

2018 STANDARD ANNUAL REPORTING

**A FINANCIAL COMPARISON
OF LEADING ORGANIZATIONS
IN THE LGBT MOVEMENT**



This report was authored by:

Movement Advancement Project

MAP's mission is to provide independent and rigorous research, insight and communications that help speed equality and opportunity for LGBT and all people. MAP works to ensure that all people have a fair chance to pursue health and happiness, earn a living, take care of the ones they love, be safe in their communities, and participate in civic life.

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KEY FINDINGS

This confidential supplement to the *2018 National LGBT Movement Report* takes a deeper look at the 40 major LGBT organizations participating in the 2018 Standard Annual Reporting project (SAR).

Revenue and Expenses

Participating organizations as a whole reported a 5% increase in revenue (excluding in-kind contributions) and a 13% increase in total combined revenue (including in-kind) from 2016 to 2017. Research and public education organizations saw the greatest increase in revenue (30% excluding in-kind), followed by issue organizations (18%). Advocacy organizations reported only small increases in revenue from 2016 to 2017 (3%). Legal organizations reported a small (4%) decrease in revenue excluding in-kind, but a 10% increase in combined revenue (including in-kind) from 2016 to 2017.

Primary revenue sources varied by organizational type. Advocacy organizations relied more on individual contributions (49% of total revenue) than any other organization type. Issue organizations relied most heavily on in-kind contributions (43% of total revenue), though legal organizations also relied on in-kind contributions for nearly one-third (31%) of their 2017 revenue. Research and public education organizations relied heavily on foundation contributions (42% of total revenue).

Organizations predict an aggregate 16% increase in expenditures from 2017 to 2018. Advocacy organizations anticipate the greatest increase (20%), followed by issue organizations (18%). Legal (4%) and research and public education (0%) organizations predict little to no change in expenditures.

Fundraising and Fundraising Efficiency

Organizations reported mixed success with donor retention between 2016 and 2017. All organization types rely heavily on small donors (those giving between \$35 and \$999 in one year), though medium (\$1,000-\$24,999) and large donors (\$25,000+) also play a key role in all organizations' revenue. From 2016 to 2017, advocacy organizations were the only organization type to report an increase across small, medium, and large donors. By contrast, research and public education organizations reported a decrease across all donor sizes. Issue organizations reported an increase in small and

large donors, but a decrease in medium donors. Legal organizations reported an increase in small donors, but a decrease in both medium and large donors.

Percent of revenue from top contributors varied by organizational type. Research and public education organizations reported the largest proportion of revenue from top ten contributors (56%). Advocacy (39%) and issue (36%) organizations reported similar proportions of revenue from top ten contributors, while legal organizations (24%) reported the lowest share of revenue from top ten donors.

Average fundraising cost to raise \$1 varied by organization type but remains generally efficient. Legal organizations had the highest cost, at an average \$0.15 to raise \$1. Research and public education organizations had the lowest cost, at an average \$0.05 to raise \$1.

Programs

Key programmatic goals for the 40 organizations vary greatly, but as a whole the groups are engaged in a comprehensive range of activities. Advocacy organizations are working at the local, state, and national levels and across diverse communities to achieve greater equality for LGBT people and fight back against anti-LGBT forces. Issue organizations are working to advance employment protections, reform immigration, ensure safe and healthy schools, and advance equality in religious communities, the workplace, and the media. Legal groups provide direct legal services to LGBT and HIV-positive people and undertake impact litigation to advance workplace protections, rights for transgender people, anti-bullying protections in schools, and to improve HIV-related laws. Research and education organizations seek to support the movement and advance LGBT equality through a range of activities including policy analysis, demographic studies, and strategic advice.

Staff and Boards

Staff demographics generally reflect the diversity of the population, but board demographics less so. As a whole, the organizations that provided staff demographic data have staff that generally reflect the racial and ethnic diversity of the broader U.S. population. Issue organizations reported the greatest racial/ethnic diversity among staff, with 54% identifying as people of color. Legal organizations reported 21% of staff identifying as transgender. Sexual orientation diversity was more varied by organization type. Board

member demographics were less diverse and less representative of the general population, compared to staff demographics.

Average senior staff compensation is generally similar across organizations. However, the low and high ends of senior staff salary ranges varied widely by organization type.

Average board sizes are relatively similar across organizations, but staff sizes are not. Average board sizes across organization types ranged from 18 to 20 members. However, research and public education organizations had a board-to-staff ratio nearly twice as high as other organizations.

2018 NATIONAL LGBT MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

METHODOLOGY

This confidential supplement to the *2018 National LGBT Movement Report* takes a deeper look at the 40 major LGBT organizations participating in the 2018 Standard Annual Reporting project (SAR).

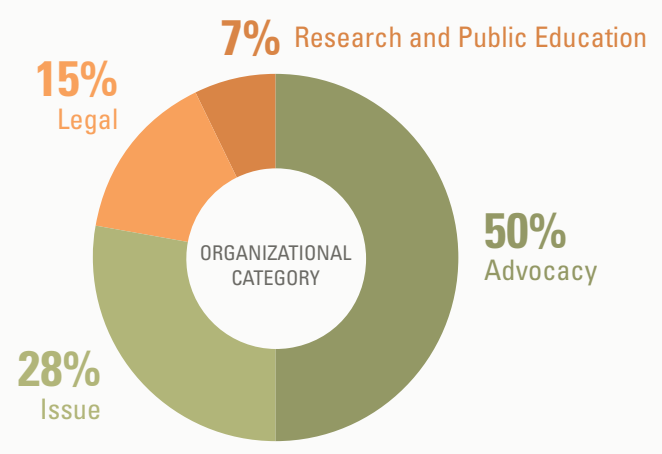
The Movement Advancement Project (MAP) selected participating organizations based on their size, importance to the overall LGBT movement, and collective coverage of LGBT issues and constituencies. Most participating organizations (32) have budgets over \$1 million; eight organizations have smaller budgets 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 a broad overview of the differences across four categories of organizations: advocacy, issue, legal, and research and public education. It also provides a composite profile for each category, following a standard two-page format. Where figures or charts reflect data based on a subset of participating organizations, this is noted.

ALL PARTICIPANTS (N=40), TOTAL 2017 REVENUE = \$269.7M, TOTAL 2017 EXPENSES = \$250.2M

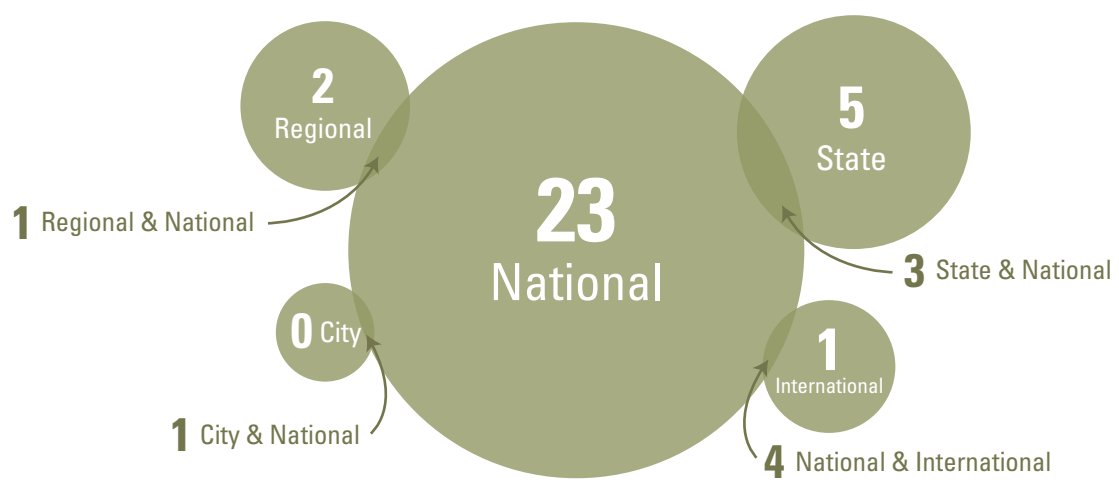
PARTICIPATING LGBT ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=40)

- 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, elements of the 2018 report (such as figures, charts, and numbers) 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.

2018 NATIONAL LGBT MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

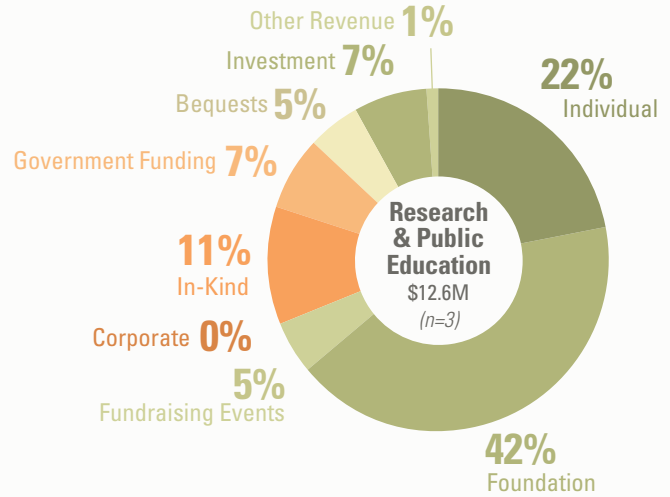
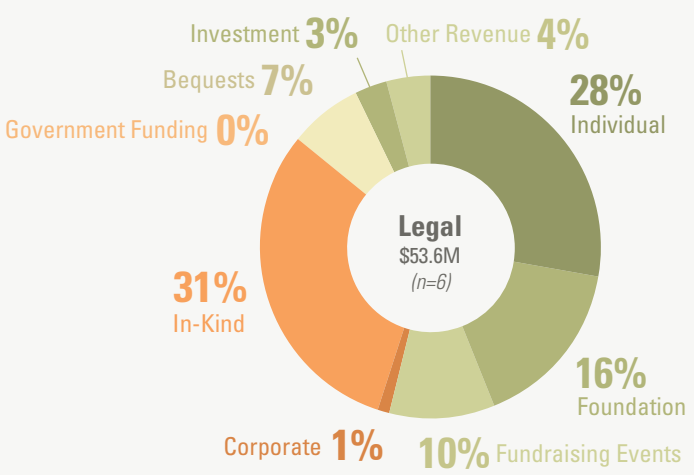
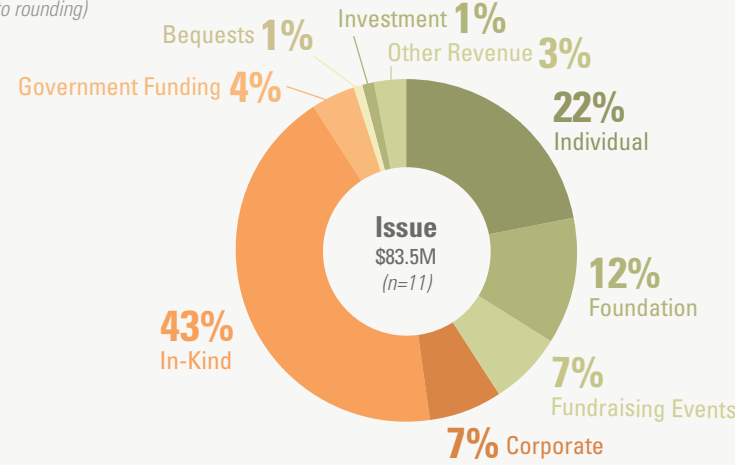
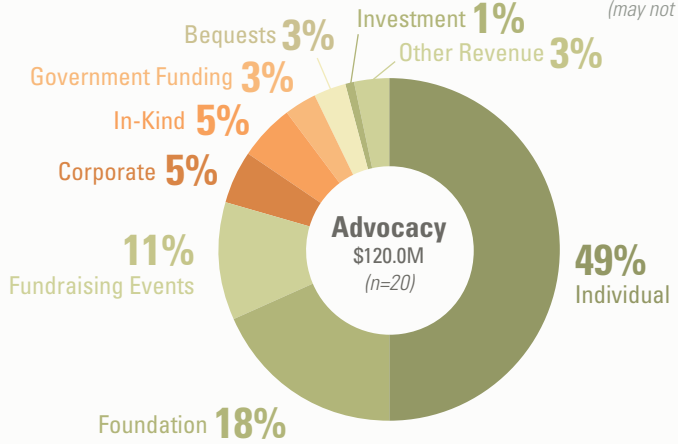
REVENUE

Participating organizations reported an aggregate 5% increase in revenue excluding in-kind contributions from 2016 to 2017, and a 13% increase in total combined revenue (including in-kind). Research and public education organizations saw the greatest increase in revenue, followed by issue and then advocacy organizations. Legal organizations reported a small decrease in revenue excluding in-kind, but a 10% increase in combined revenue (including in-kind). Primary revenue sources varied by organizational type. Advocacy organizations relied more on individual contributions than any other organization type. Issue organizations relied most heavily on in-kind contributions, though legal organizations also relied on in-kind contributions for nearly one-third of their 2017 revenue. Research and public education organizations relied heavily on foundation contributions.

ALL PARTICIPANTS (N=40), TOTAL 2017 REVENUE = \$269.7M, TOTAL 2017 EXPENSES = \$250.2M

ORGANIZATIONS HAVE DIVERSE REVENUE STREAMS

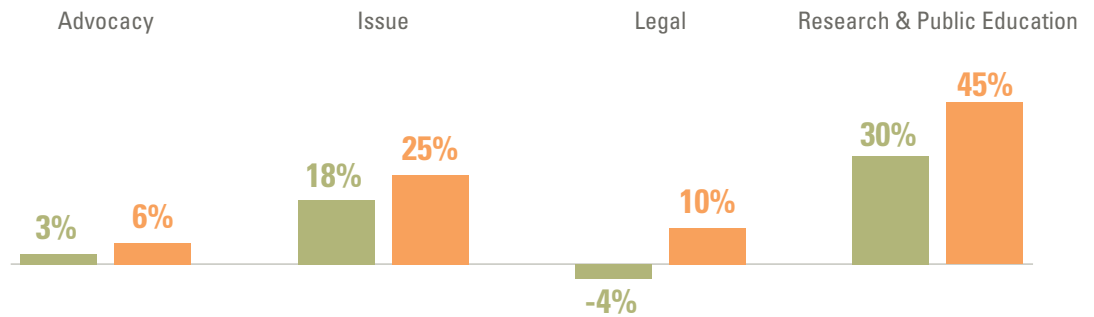
2017 Revenue By Source
(may not sum to 100 due to rounding)



PERCENT CHANGE IN REVENUE FROM 2016 TO 2017

All Participants (n=40)

■ Excluding In-Kind Expenses
■ Including In-Kind Expenses



2018 NATIONAL LGBT MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

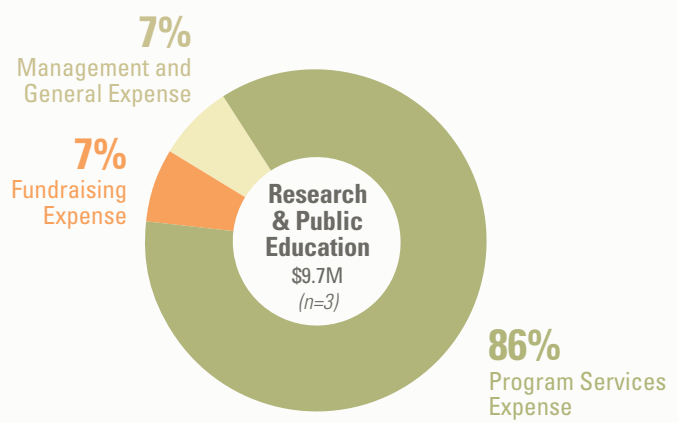
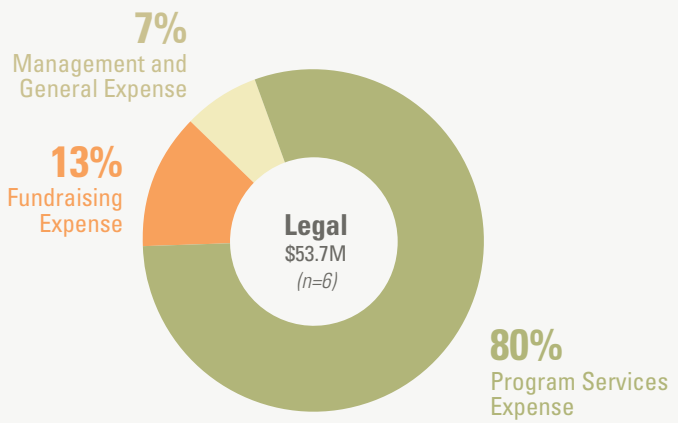
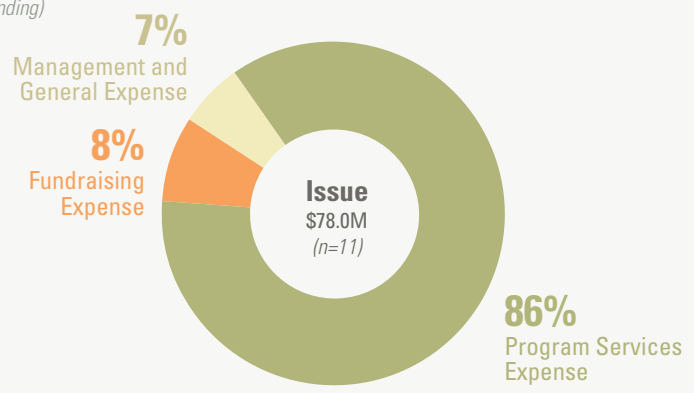
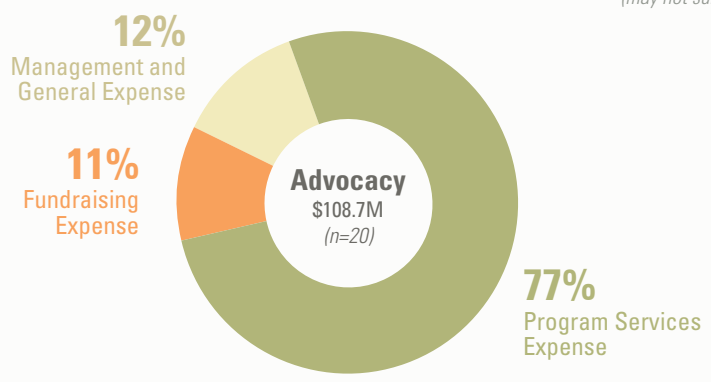
EXPENSES

Organizations cumulatively predict a 16% increase in expenditures from 2017 to 2018. Advocacy organizations anticipate the greatest increase, followed by issue organizations. Legal and research and public education organizations predict little to no change in expenditures. All organization types exceeded Better Business Bureau benchmarks for programmatic spending.

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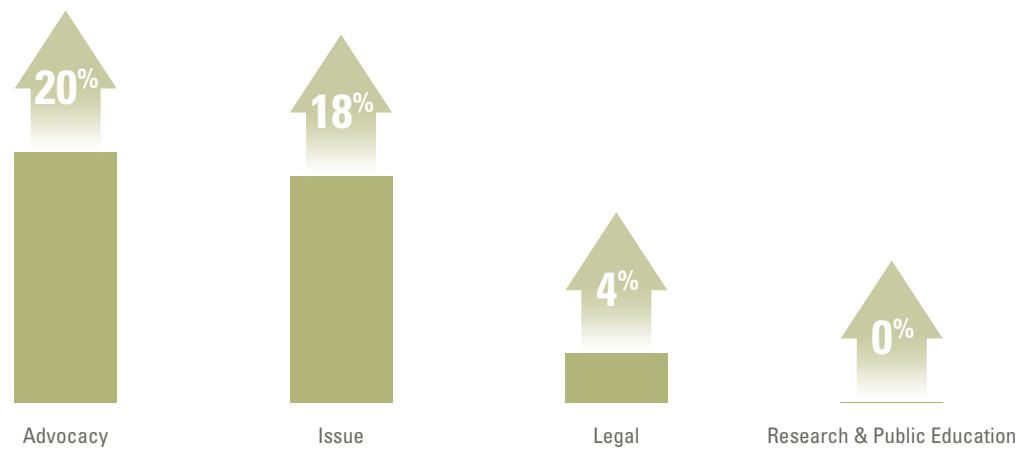
ORGANIZATIONS, REGARDLESS OF TYPE, MEET NONPROFIT STANDARDS FOR PROGRAM SPENDING

2017 Expenses By Expense Category
 (may not sum to 100 due to rounding)



ORGANIZATIONS PROJECT 16% AVERAGE INCREASE IN EXPENSES FROM 2017 TO 2018, VARIED BY ORGANIZATION TYPES

% Change from 2017 Expenses (Excluding In-Kind Expenses) to 2018 Projected Budgets



2018 NATIONAL LGBT MOVEMENT REPORT

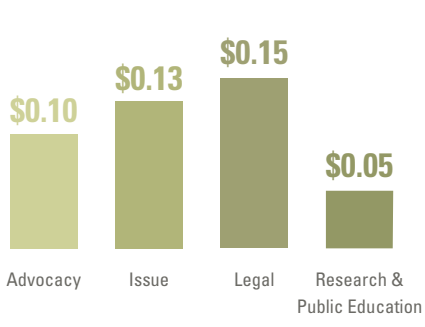
COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

FUNDRAISING

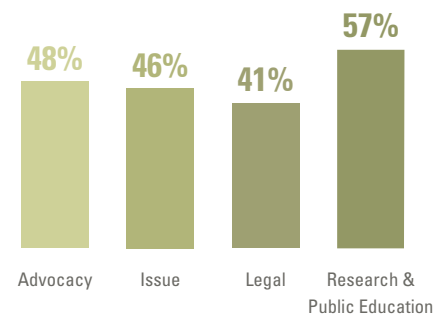
The average fundraising cost to raise one dollar varies by organization type but remains generally efficient. Organizations reported mixed success with donor retention from 2016 to 2017, and the percent of revenue from top ten contributors varied by organizational type. Research and public education organizations reported the largest share of revenue coming from top ten donors. All organization types rely heavily on small donors (those giving between \$35 and \$999 in one year), though medium (\$1,000-\$24,999) and large donors (\$25,000+) also play a key role in all organizations' revenue. From 2016 to 2017, advocacy organizations were the only organization type to report an increase in small, medium, and large donors. By contrast, research and public education organizations reported a decrease in all donor sizes.

ALL PARTICIPANTS (N=40), TOTAL 2017 REVENUE = \$269.7M, TOTAL 2017 EXPENSES = \$250.2M

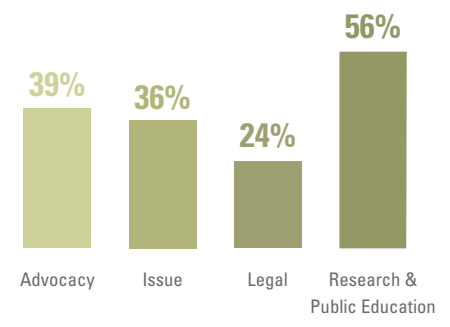
2017 AVERAGE FUNDRAISING EXPENSE TO RAISE \$1



2017 AVERAGE DONOR TURNOVER (n=38)

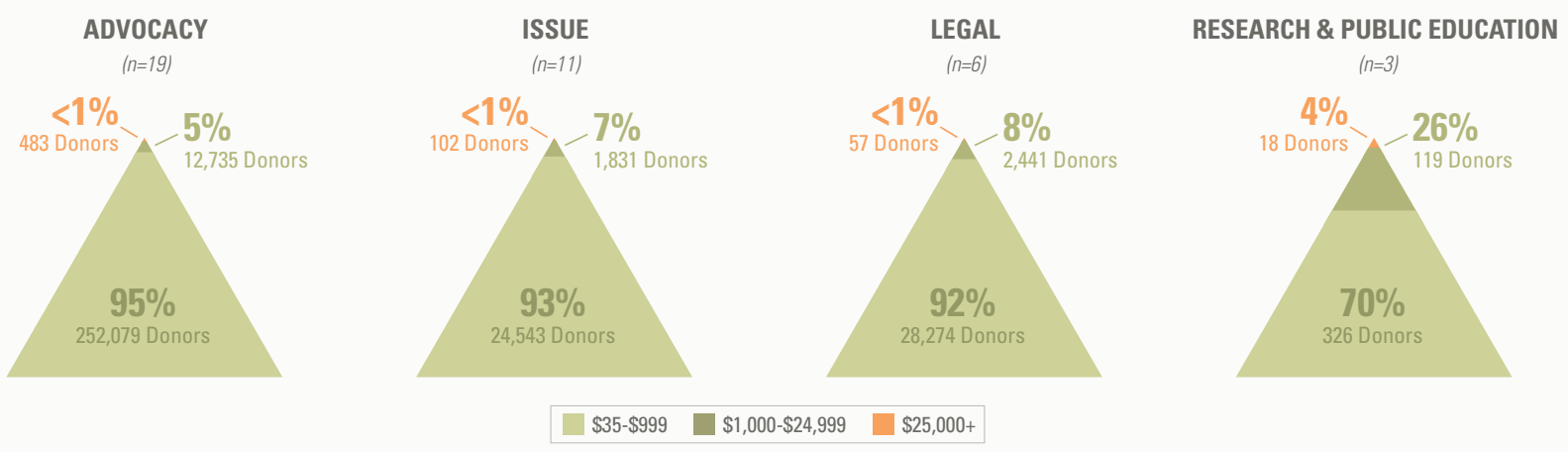


2017 PERCENT OF REVENUE FROM TOP TEN CONTRIBUTORS



ORGANIZATIONS RELY ON SMALL, MEDIUM, AND LARGE DONORS

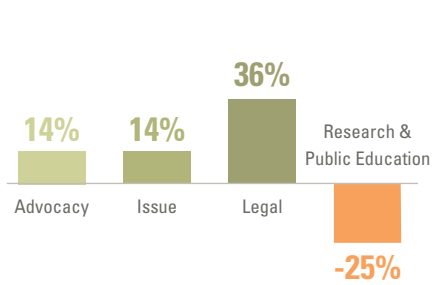
Number and Percent of Total Donors Giving At Various Levels Per Year



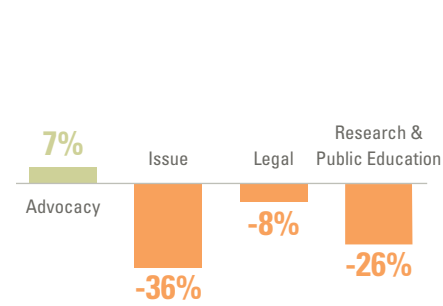
FROM 2016 TO 2017, ADVOCACY ORGANIZATIONS SAW INCREASES IN ALL DONATION SIZES; OTHER ORGANIZATIONS HAD MIXED EXPERIENCES

Change in Total Number of Donors for Participating Organizations (n=39)

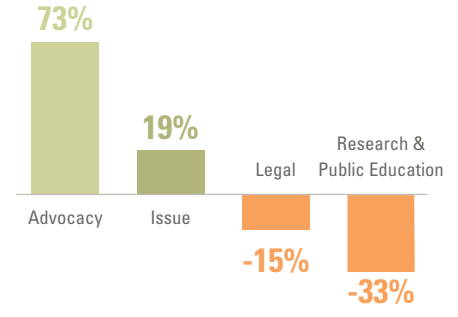
DONORS GIVING > \$35



DONORS GIVING > \$1,000



DONORS GIVING > \$25,000



2018 NATIONAL LGBT MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

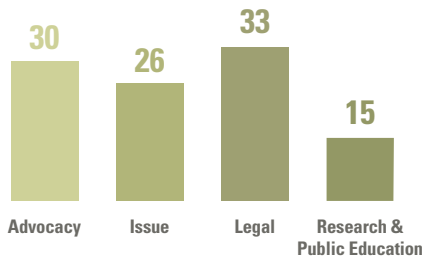
STAFF

Staff demographics generally reflect the diversity of the population. As a whole, the organizations that provided staff demographic data have staff that generally reflect the racial and ethnic diversity of the broader U.S. population. Issue organizations reported the greatest racial and ethnic diversity. Note that in some cases percentages may not add to 100 due to rounding. Average compensation for senior staff is relatively similar across organization type, but the low and high ends of senior staff salary ranges varied widely by organization type.

ALL PARTICIPANTS (N=40), TOTAL 2017 REVENUE = \$269.7M, TOTAL 2017 EXPENSES = \$250.2M

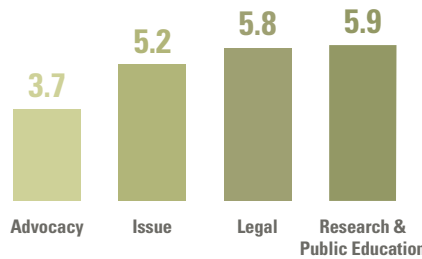
AVERAGE NUMBER OF STAFF IS HIGHEST FOR LEGAL ORGANIZATIONS

Average Number of Total Paid Staff (n=39)



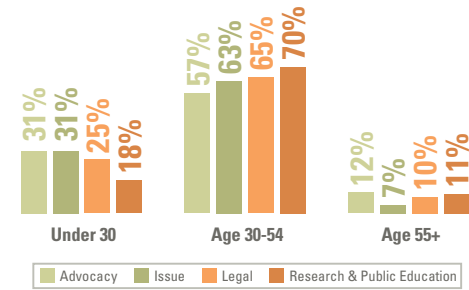
TENURE OF SENIOR MANAGEMENT IS LONGEST FOR RESEARCH & LEGAL ORGANIZATIONS

Average Senior Management Tenure, in Years (n=40)



MAJORITIES OF STAFF ACROSS ORGANIZATION TYPES ARE AGES 30-54

Average Age of Staff (n=39)

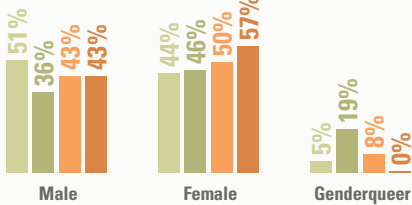


ISSUE ORGANIZATIONS REPORT GREATEST STAFF DIVERSITY BY GENDER, RACE/ETHNICITY; SEXUAL ORIENTATION DEMOGRAPHICS VARY BY ORGANIZATION TYPE

% of Staff Identifying as Each Demographic Category (n=33-39)

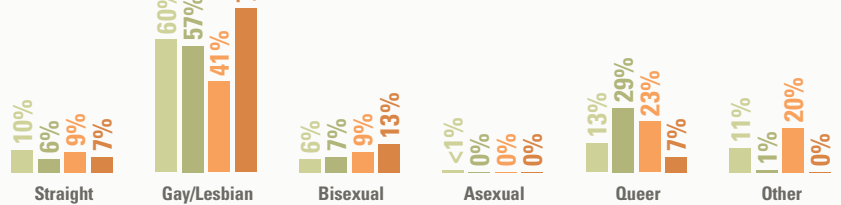
GENDER

% of Staff Identifying As... (n=38)



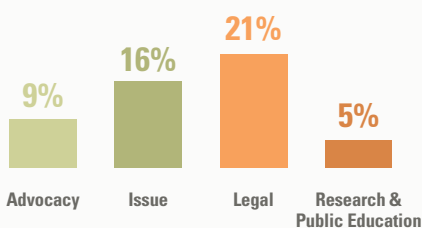
SEXUAL ORIENTATION

% of Staff Identifying As... (n=33)



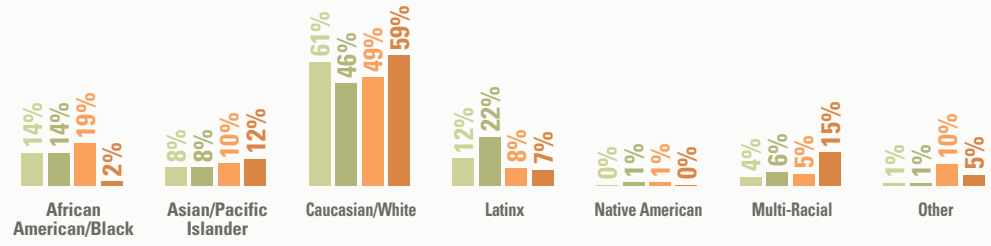
TRANSGENDER

% of Staff Identifying As Transgender (n=38)



RACE/ETHNICITY

% of Staff Identifying As... (n=39)



AVERAGE SENIOR STAFF COMPENSATION RELATIVELY SIMILAR ACROSS ORGANIZATION TYPE, BUT LOW AND HIGH SALARIES VARY

Average Senior Staff Compensation (n=38)



2018 NATIONAL LGBT MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

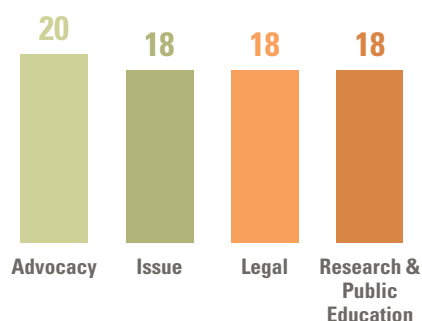
BOARD

The boards of participating organizations were generally less diverse than staff. Legal organizations reported the greatest diversity among board members. Average board sizes across organization types ranged from 18 to 20 members, but research and public education organizations had a board-to-staff ratio nearly twice as high as other organizations.

ALL PARTICIPANTS (N=40), TOTAL 2017 REVENUE = \$269.7M, TOTAL 2017 EXPENSES = \$250.2M

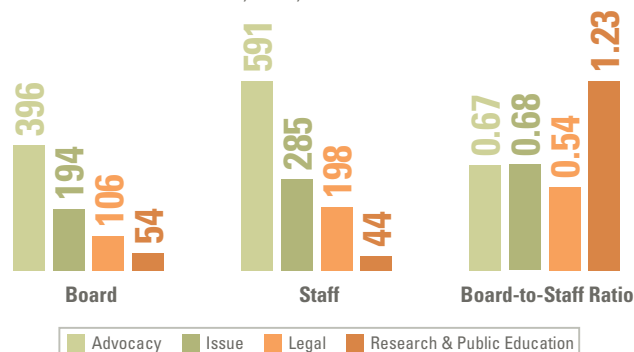
ORGANIZATIONS HAVE ROUGHLY THE SAME AVERAGE NUMBER OF BOARD MEMBERS

Average Number of Board Members (n=40)



RESEARCH & PUBLIC EDUCATION ORGANIZATIONS HAVE HIGHEST BOARD:STAFF RATIO

2017 Board, Staff, and Board:Staff Ratio

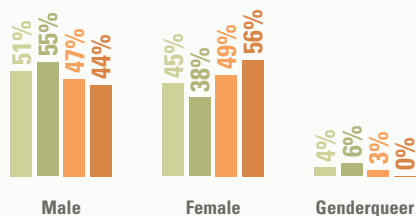


BOARD DIVERSITY VARIES BY ORGANIZATION TYPE

% of Board Identifying as Each Demographic Category (n=34-38)

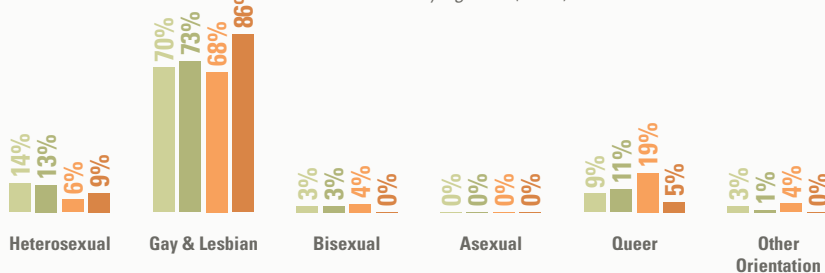
GENDER

% of Board Identifying As... (n=38)



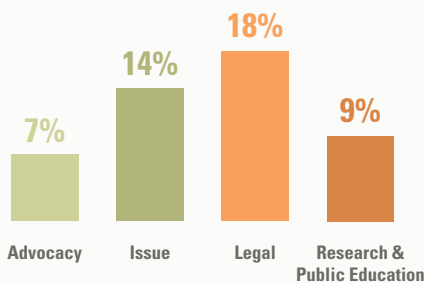
SEXUAL ORIENTATION

% of Board Identifying As... (n=34)



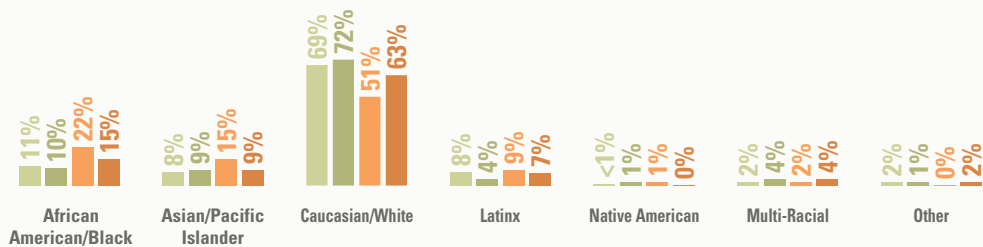
TRANSGENDER BOARD MEMBERS

% of Board Identifying As Transgender (n=38)



RACE/ETHNICITY

% of Board Identifying As... (n=38)



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COMPOSITE PROFILE: ADVOCACY ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure	C3	C4	PAC
	(% of 2017 revenue)		
Basic Rights Oregon (BRO)	74%	24%	2%
Campaign for Southern Equality (CSE)	100%		
Equality California (EqCA)	57%	43%	
Equality Federation (EQ Fed)	95%	5%	
Equality Florida (EqFL)	93%	7%	
Equality Maine (EqME)	97%	3%	
Family Equality Council (FEC)	100%		
Gay & Lesbian Victory Fund and Leadership Institute (Victory Fund/GLVI)	72%	28%	
Human Rights Campaign and Federation (HRC)	56%		44%
Keshet	28%	72%	
Log Cabin Republicans (Log Cabin)	58%	42%	
MassEquality	56%	44%	
National Center for Transgender Equality (NCTE)	100%		
National Queer Asian Pacific Islander Alliance (NQAPIA)	100%		
PFLAG National (PFLAG)	100%		
Services and Advocacy for GLBT Elders (SAGE)	100%		
Southerners on New Ground (SONG)	100%		
Task Force	99%	1%	
True Colors Fund	100%		

Advocacy Organizations - Category Definition

Advocacy organizations advocate for a specific constituency across a broad spectrum of issues. These organizations use a wide range of strategies, including legislative advocacy, public and media education, litigation, coalition building, protests and rallies, and research.

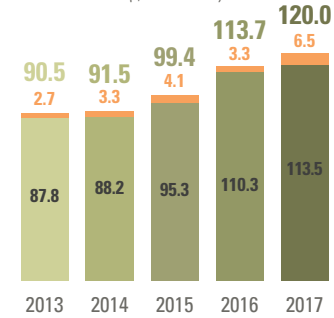


2017 performance on charity watchdog benchmarks: All advocacy organizations met AIP and BBB benchmarks in 2017.

REVENUE, EXPENSES & BUDGET

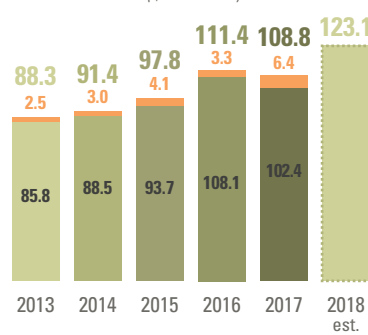
COMBINED REVENUE

(\$ millions)



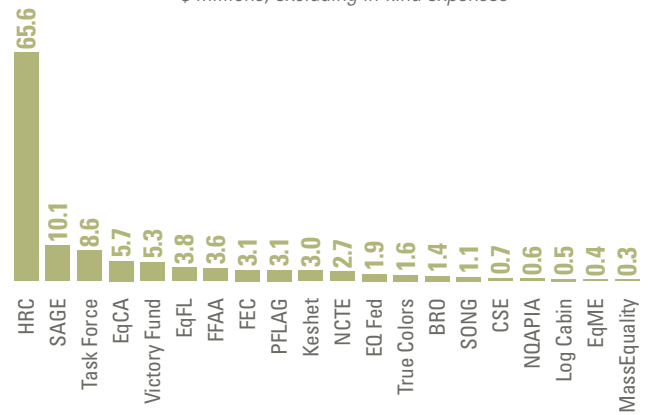
COMBINED EXPENSES

(\$ millions)



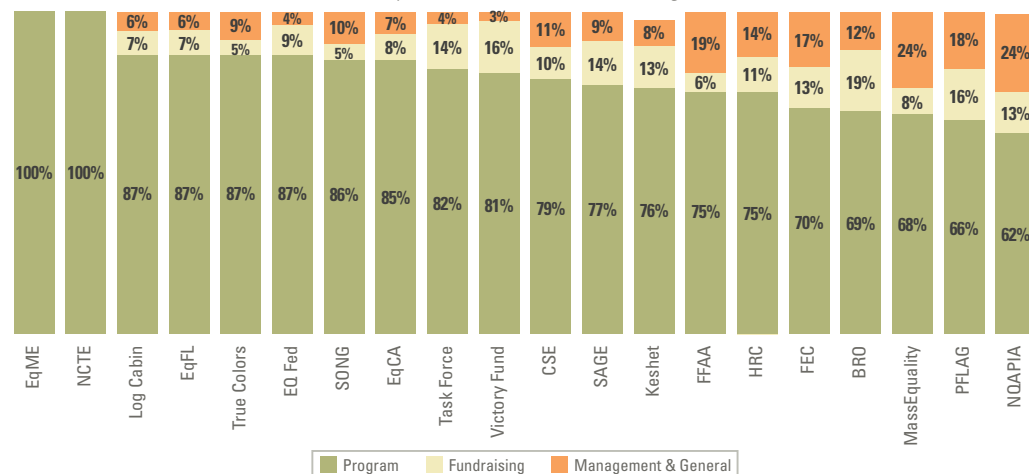
2017 BUDGET

\$ millions, excluding in-kind expenses

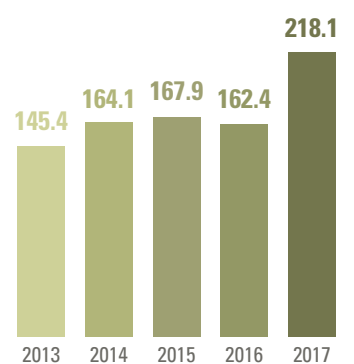


EXPENSE BREAKDOWN

(may not sum to 100 due to rounding)



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS



Note: The average was calculated using the total number of organizations for which data were available.

COMPOSITE PROFILE: ISSUE ORGANIZATIONS

PARTICIPATING ISSUE ORGANIZATIONS

Organizations and Legal Structure	C3	C4	PAC
	(% of 2017 revenue)		
CenterLink	100%		
GLAAD	100%		
GLSEN	100%		
Gender and Sexualities Alliance Network (GSA)	100%		
Immigration Equality (Imm EQ)	99%	<1%	
New York City Gay and Lesbian Anti-Violence Project (NYCAVP)	100%		
Out & Equal	100%		
Point Foundation	100%		
Reconciling Ministries Network (RMN)	100%		
Soulforce	100%		
Trevor Project	100%		

Issue Organizations - Category Definition

Issue organizations advocate for a specific issue using a wide range of strategies, including legislative advocacy, public and media education, litigation, coalition building, protests and rallies, and research.

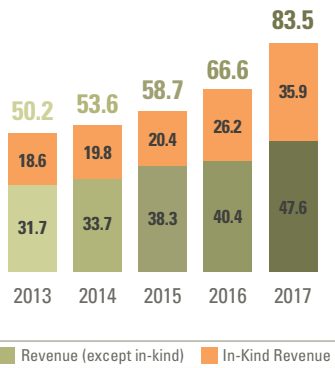


2017 performance on charity watchdog benchmarks: All issue organizations met AIP and BBB benchmarks in 2017.

REVENUE, EXPENSES & BUDGET

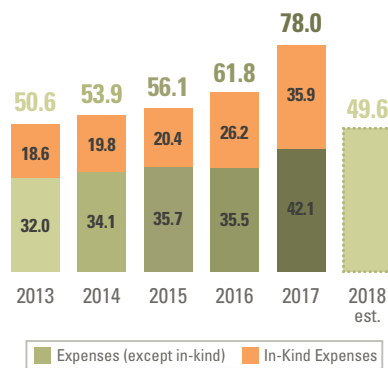
COMBINED REVENUE

(\$ millions)



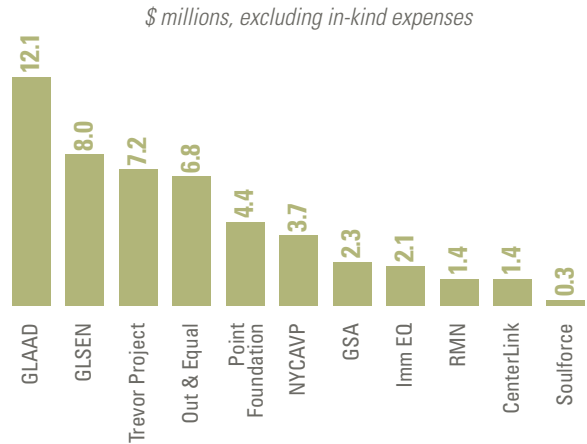
COMBINED EXPENSES

(\$ millions)



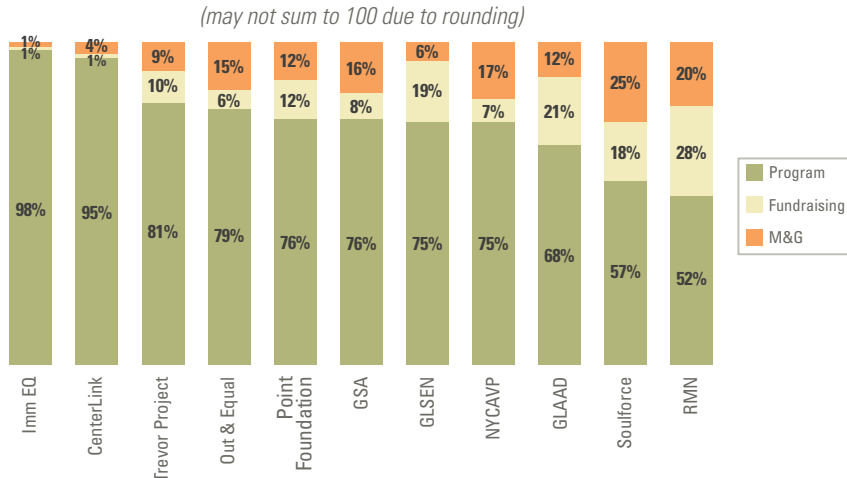
2018 BUDGET

\$ millions, excluding in-kind expenses

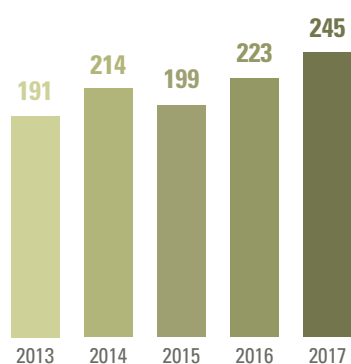


EXPENSE BREAKDOWN

(may not sum to 100 due to rounding)



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS



Note: The average was calculated using the total number of organizations for which data were available.

COMPOSITE PROFILE: LEGAL ORGANIZATIONS

PARTICIPATING LEGAL ORGANIZATIONS

Organizations and Legal Structure	C3	C4	PAC
	(% of 2017 revenue)		
American Civil Liberties Union (ACLU)	100%		
GLBTQ Legal Advocates and Defenders (GLAD)	100%		
Lambda Legal (Lambda)	100%		
National Center for Lesbian Rights (NCLR)	100%		
Sylvia Rivera Law Project (SRLP)	100%		
Transgender Law Center (TLC)	100%		

Legal Organizations - Category Definition

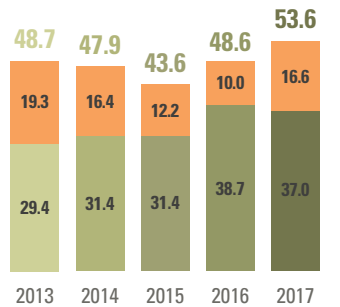
Legal organizations work to achieve full civil legal rights for LGBT people through litigation, policy advocacy, public education, and coalition building.



2017 performance on charity watchdog benchmarks: All legal organizations met AIP and BBB benchmarks in 2017.

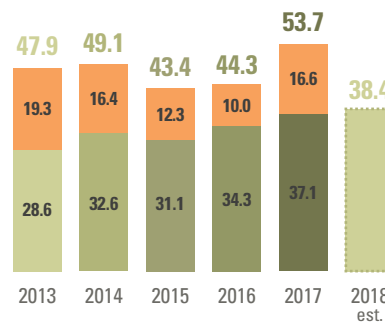
REVENUE, EXPENSES & BUDGET

COMBINED REVENUE (\$ millions)



Revenue (except in-kind) In-Kind Revenue

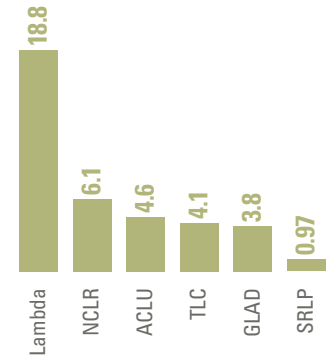
COMBINED EXPENSES (\$ millions)



Expenses (except in-kind) In-Kind Expenses

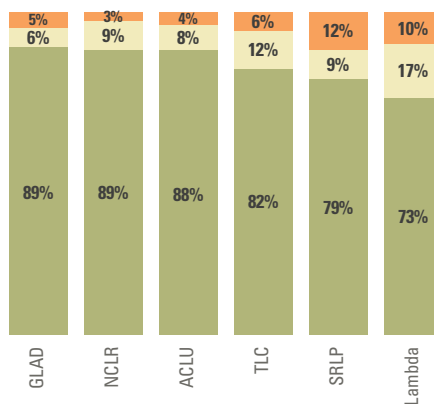
2018 BUDGET

\$ millions, excluding in-kind expenses



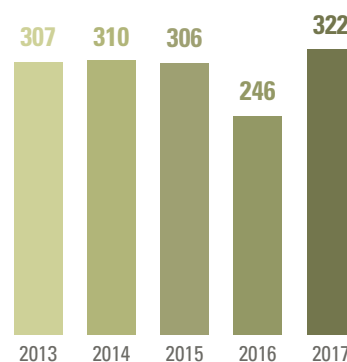
EXPENSE BREAKDOWN

(may not sum to 100 due to rounding)



Program Fundraising M&G

AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS



Note: The average was calculated using the total number of organizations for which data were available.

COMPOSITE PROFILE: RESEARCH & PUBLIC EDUCATION ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure	C3	C4	PAC
	(% of 2017 revenue)		
Funders for LGBTQ Issues (FLGBTQI)	100%		
Movement Advancement Project (MAP)	100%		
Williams Institute (Williams)	100%		

Research & Public Education Organizations - Category Definition

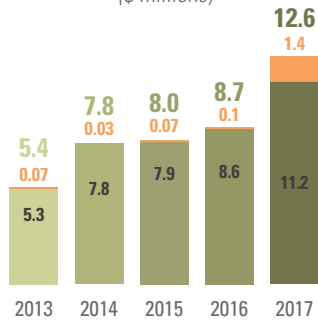
Research and public education organizations provide data and information to the LGBT movement and the general public on the social and economic status and needs of LGBT people.



2017 performance on charity watchdog benchmarks: All research and public education organizations met AIP and BBB benchmarks in 2017.

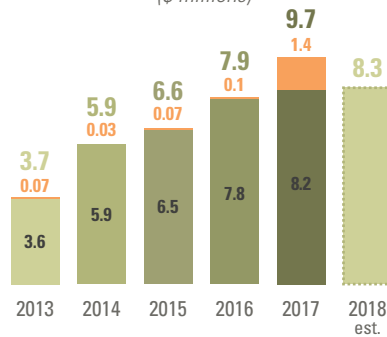
REVENUE, EXPENSES & BUDGET

COMBINED REVENUE (\$ millions)



Revenue (except in-kind) In-Kind Revenue

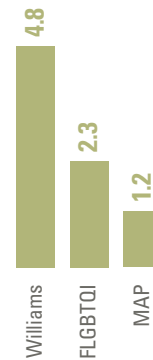
COMBINED EXPENSES (\$ millions)



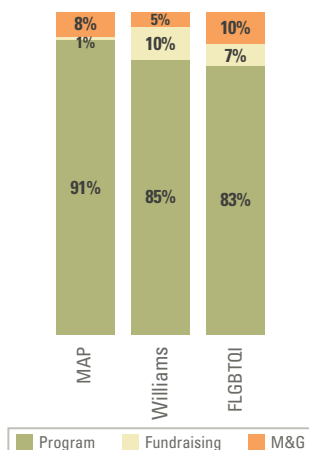
Expenses (except in-kind) In-Kind Expenses

2018 BUDGET

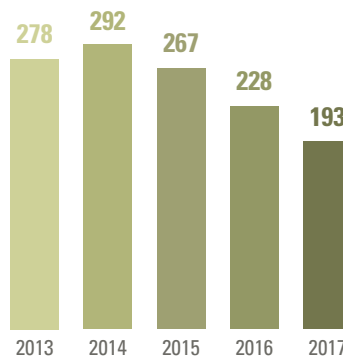
\$ millions, excluding in-kind expenses



EXPENSE BREAKDOWN



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS



Note: The average was calculated using the total number of organizations for which data were available.

ABOUT THIS REPORT

The Standard LGBT Annual 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, and research and public education organizations.



movement advancement project ▶

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