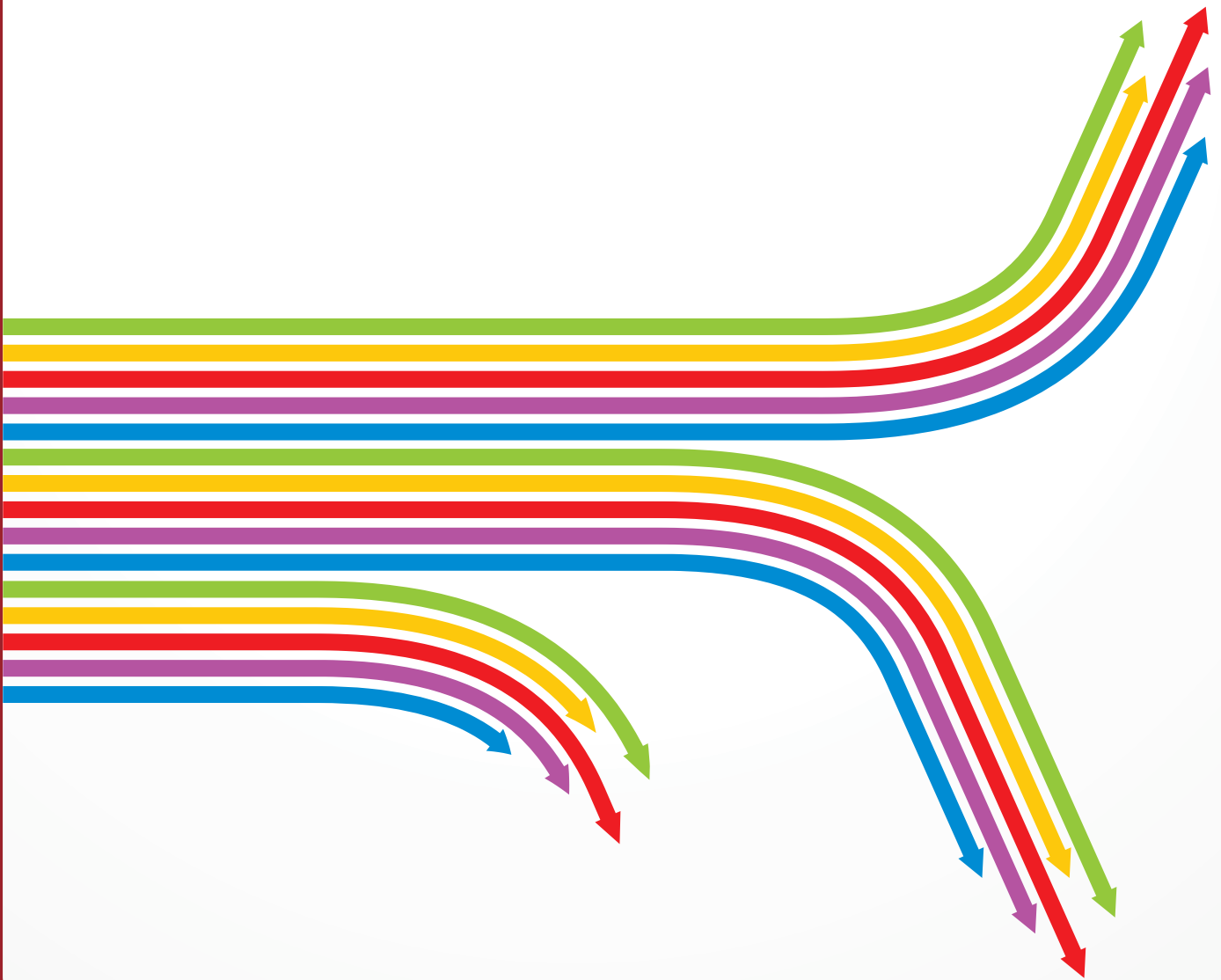


2022 STANDARD ANNUAL REPORTING

**A FINANCIAL COMPARISON
OF LEADING ORGANIZATIONS
IN THE LGBTQI 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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This report is part of an annual series assessing the financial health of major organizations in the LGBTQI movement. To see previous reports in the series, as well as other research on the capacity of the LGBTQI movement, please visit www.mapresearch.org/lgbt-advocacy-organizations.

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KEY FINDINGS

This confidential supplement to the *2022 National LGBTQI Movement Report* takes a deeper look at the 36 major LGBTQI organizations participating in the 2022 Standard Annual Reporting (SAR) project. Organizations are categorized as focusing on either broad LGBTQI **advocacy**, **issue-specific advocacy**, **legal advocacy**, or **research and public education** about LGBTQI people and issues.

Revenue and Expenses

From 2020 to 2021—amid the ongoing COVID-19 pandemic—participating organizations reported an aggregate 10% increase in revenue (excluding in-kind). Including in-kind income, combined revenue increased 2%. Legal organizations saw the greatest increase in revenue (46%, excluding in-kind), followed far behind by advocacy (5%) and issue organizations (3%). Research and public education organizations reported a 49% decrease in revenue from 2020 to 2021, but in 2020, both participating research organizations received large, one-time gifts, meaning that the 2021 decrease reflects more a return to normal revenue rather than marked decline.

Primary revenue sources varied by organizational type. Individual contributions comprised the largest share of revenue for all organization types except research organizations, which relied primarily on foundation contributions.

All organization types projected increased expenditures in fiscal year 2022. Issue and legal organizations both report they anticipate a 6% increase in spending from 2021 to 2022, while research organizations and advocacy organizations both project a 26% increase.

Fundraising and Fundraising Efficiency

All organization types rely heavily on “micro” and “small” donors (respectively, those giving less than \$35 in one year, and those giving between \$35 and \$999 in one year). These donors comprise over 75% of donors in 2021 for all organization types. Advocacy organizations have the largest share of micro donors, with 38% of donors to advocacy organizations giving at this level in 2021. Legal organizations have the largest share of small donors, with 69% of donors to legal organizations giving at this level. Research and public education organization report the largest share of both

“medium” (\$1,000 - \$24,999 in one year) and “large” (\$25,000 or more) donors.

Organizational data show that the second year of the COVID-19 pandemic continues to impact donor and donation patterns, with distinct trends for each LGBTQI organization type. As shown in the public *2022 National Movement Report*, from 2020 to 2021 and across all organizations combined, the number of micro, medium, and large donors all fell sharply, while the number of small donors rose only 1%. Looking at each organization type, however, there were more varied experiences:

- Advocacy organizations reported the same pattern as the overall trend, with double-digit decreases in the number of micro, medium, and large donors, and only a 2% increase in the number of small donors.
- While issue organizations also reported decreases in micro donors and a slight increase in small donors, these organizations reported a different trend with double-digit *increases* in the number of medium and large donors.
- Legal organizations saw decreases in the number of micro, small, and medium donors, but a double-digit increase in the number of large donors.
- Research and public education organizations reported significant decreases in the number of micro, medium, and large donors, and no change in the number of small donors.

Percent of revenue from top donors varied by organizational type. Issue (42%), research (41%), and advocacy organizations (40%) all reported generally similar proportions of revenue from top ten contributors, with legal organizations reporting a lower amount (32%).

Average fundraising costs varied by organization type but remain generally efficient even during 2021. Advocacy organizations had the highest cost, at an average \$0.10 to raise \$1. Research and public education organizations had the lowest cost, at an average \$0.06 to raise \$1. As shown in the public report, average fundraising costs across the movement also fell during the pandemic.

Staff and Boards

Legal organizations report the largest average staff size (41), while issue organizations have the lowest average size (16 staff). While average staff size varies

by organization type, average board size is relatively similar across organization types, ranging from 17 to 21 members. However, both issue and research organizations have a board-to-staff ratio roughly twice as high as other organization types.

Generally, the vast majority of staff at participating organizations are full-time employees, but this varies by organization type. Research and public education organizations report that 26% of their staff are part-time, compared to 4-8% at other organization types.

Average senior staff compensation ranges from \$123,400 at issue organizations to \$180,000 at legal organizations. However, the low and high ends of senior staff salary ranges vary widely within and across each organization type.

Organizations that reported staff demographics have diverse staff with respect to race and ethnicity, gender identity, transgender status, sexual orientation, and age. Responding advocacy and legal organizations report that at least half of staff are people of color. Issue organizations reported 22% of staff are transgender, the highest of any organization type. Issue and research organizations both reported that the majority of staff are women, and issue organizations also report the largest share of staff (23%) who are nonbinary, genderqueer, or another gender.

Overall, participating organizations report diverse boards, but generally less diverse than their staff. Legal organizations are the only type to report the majority of board members are people of color, and across all responding organizations (n=30), there were zero reported board members who are Native American. Advocacy organizations report the highest share of board members who are transgender (10%), but for all organization types, there are fewer transgender board members than transgender staff. Similarly, across all organization types, the share of board members who are nonbinary, genderqueer, or another gender is lower than the share of staff who are nonbinary, genderqueer, or another gender.

2022 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



METHODOLOGY

This confidential supplement to the 2022 *National LGBTQI Movement Report* takes a deeper look at the 36 major LGBTQI organizations participating in the 2022 Standard Annual Reporting (SAR) project, reporting on fiscal year 2021. The Movement Advancement Project (MAP) selected participating organizations based on their size, importance to the overall LGBTQI movement, and collective coverage of LGBTQI issues and constituencies. Most participating organizations (32) have budgets over \$1 million; four organizations have smaller budgets but are national leaders working in areas of critical concern to the LGBTQI 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 findings 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.

36 PARTICIPANTS, TOTAL 2021 REVENUE = \$385.8M, TOTAL 2021 EXPENSES = \$267.3M

PARTICIPATING LGBTQI ORGANIZATIONS ARE COMPRISED OF ADVOCACY, ISSUE, LEGAL, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS

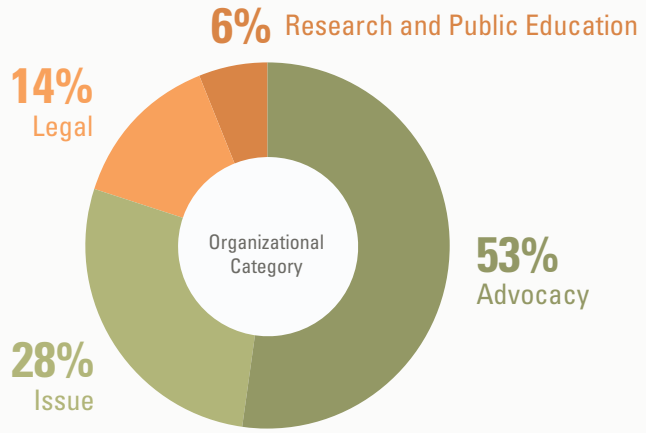
(n=36)

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

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

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

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



THE MAJORITY OF PARTICIPATING ORGANIZATIONS FOCUS ON NATIONAL LGBTQI ISSUES

Note: Many organizations noted more than one focus, as shown below.

ADVOCACY (n=19)



ISSUE (n=10)



LEGAL (n=5)



RESEARCH (n=2)



NOTE: Participating organizations in this survey vary from year to year. **Because of the change in participants, elements of the 2019 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.

2022 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

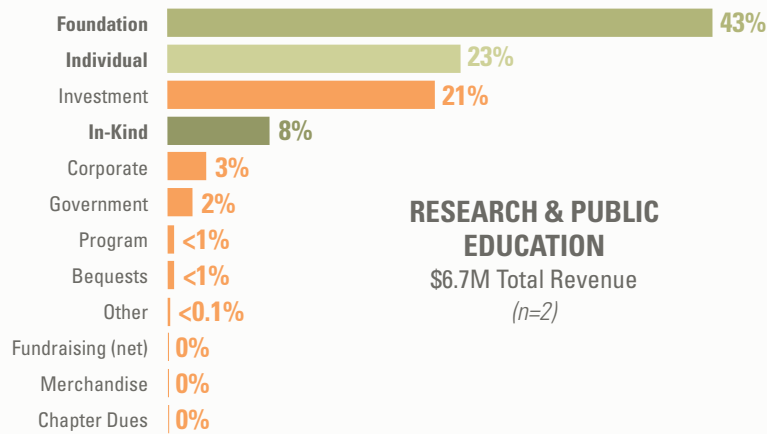
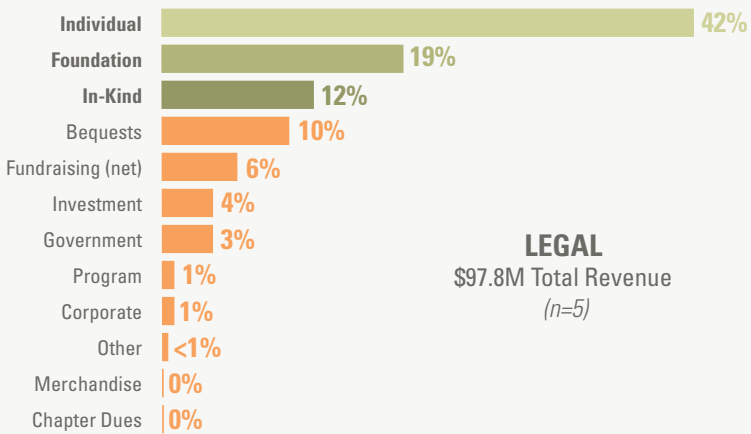
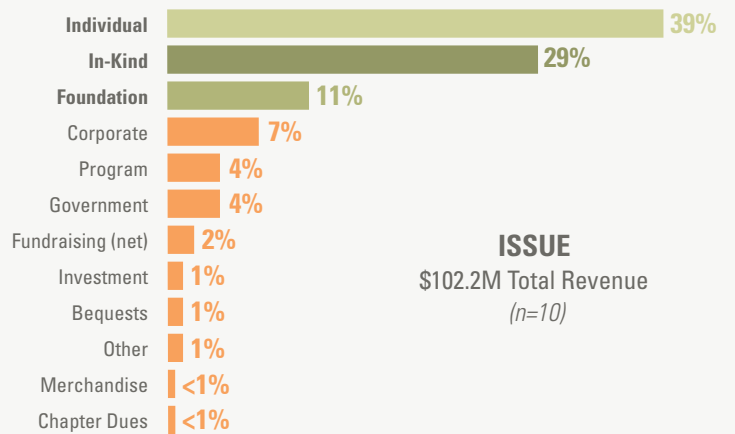
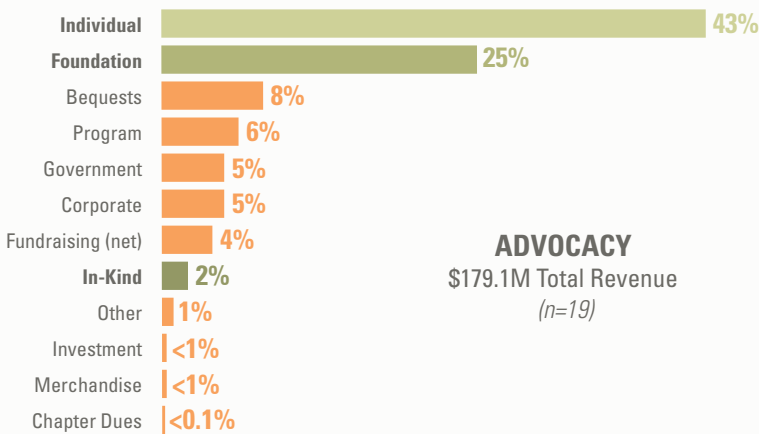
REVENUE

Primary revenue sources varied by organizational type. For fiscal year 2021, individual contributions comprised the largest share of revenue for all organization types except research organizations, which relied primarily on foundation contributions. As shown in the National Movement Report, from 2020 to 2021, participating organizations reported an aggregate 2% increase in total combined revenue (including in-kind contributions), and a 10% increase in revenue excluding in-kind.

36 PARTICIPANTS, TOTAL 2021 REVENUE = \$385.8M, TOTAL 2021 EXPENSES = \$267.3M

ORGANIZATIONS HAVE DIVERSE REVENUE STREAMS

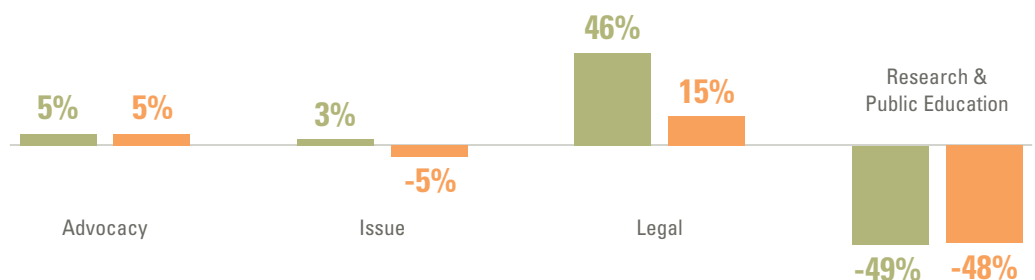
2021 Revenue By Source
(may not sum to 100 due to rounding)



REVENUE GROWTH IN 2021 DIFFERED BY ORGANIZATION TYPE

Percent Change in Revenue from 2020 to 2021 (n=36)

■ Excluding In-Kind Contributions
■ Including In-Kind Contributions



Note: In 2020, both participating research organizations received large, one-time gifts, so the 2021 decrease shown here more reflects a return to previous levels than a marked decline.

2022 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



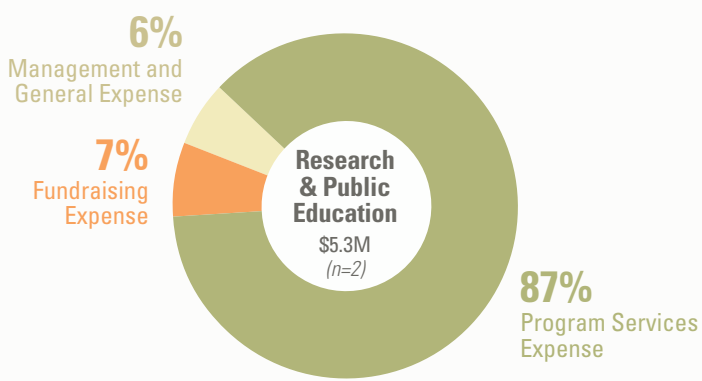
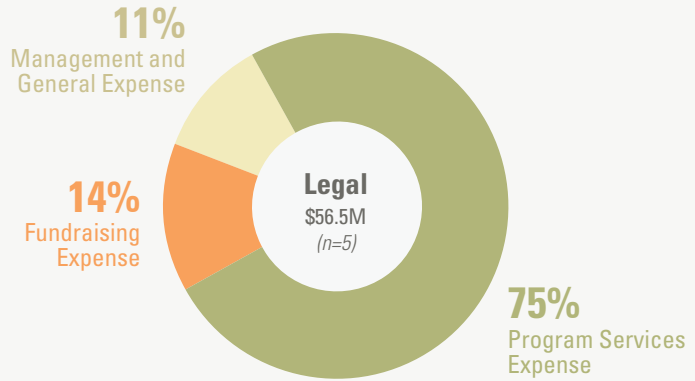
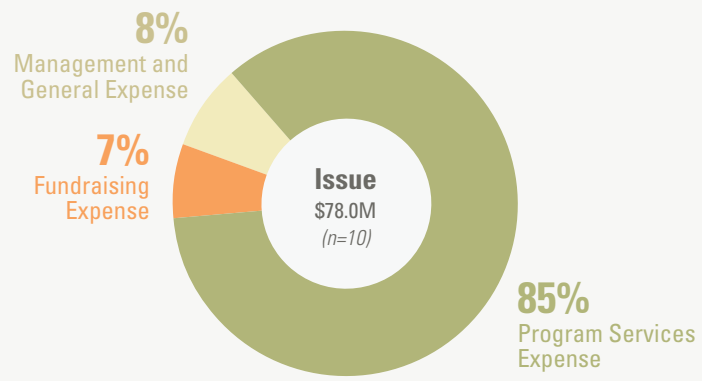
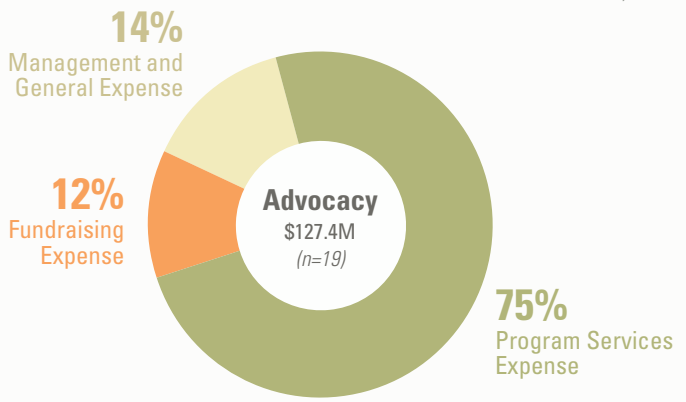
EXPENSES

In 2021, all organization types exceeded Better Business Bureau benchmarks for programmatic spending (at least 65% of total expenses). As of mid-2022, organizations predicted a combined 18% increase in expenditures from 2021 to 2022. Advocacy and research organizations project double-digit increases, while issue and legal organizations project relatively more modest increases.

36 PARTICIPANTS, TOTAL 2021 REVENUE = \$385.8M, TOTAL 2021 EXPENSES = \$267.3M

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

2021 Expenses By Expense Category
 (may not sum to 100 due to rounding)



AS OF MID-2022, ORGANIZATIONS PROJECT COMBINED 18% INCREASE IN EXPENSES, BUT PROJECTIONS VARY BY ORGANIZATION TYPES

% Change from 2021 Expenses (Excluding In-Kind Expenses) to Mid-2022 Projected Budgets



MAP Member Resource
Confidential, for use by MAP member organizations only.

2022 NATIONAL LGBTQI MOVEMENT REPORT

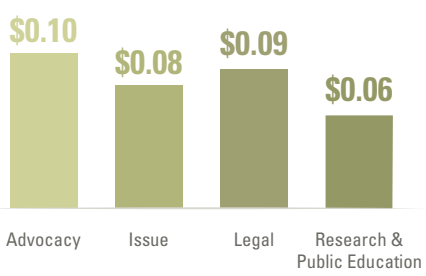
COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



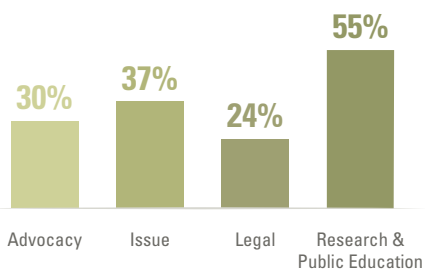
FUNDRAISING

The average fundraising cost to raise one dollar varies by organization type but remains generally efficient. New donors (defined as individual donors who have never before given to the organization) and the percent of revenue from top ten donors also varied by organization type. Among organizations that reported donor data, all organization types rely heavily on micro donors (those giving <\$35 per year) and 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.

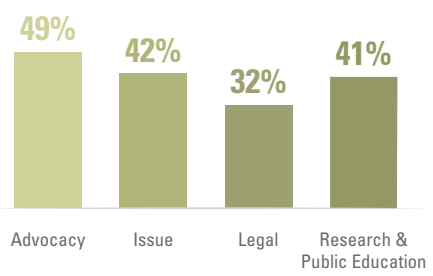
2021 AVERAGE FUNDRAISING EXPENSE TO RAISE \$1
(n=35)



2021 PERCENT OF DONORS THAT ARE NEW DONORS
(n=28)

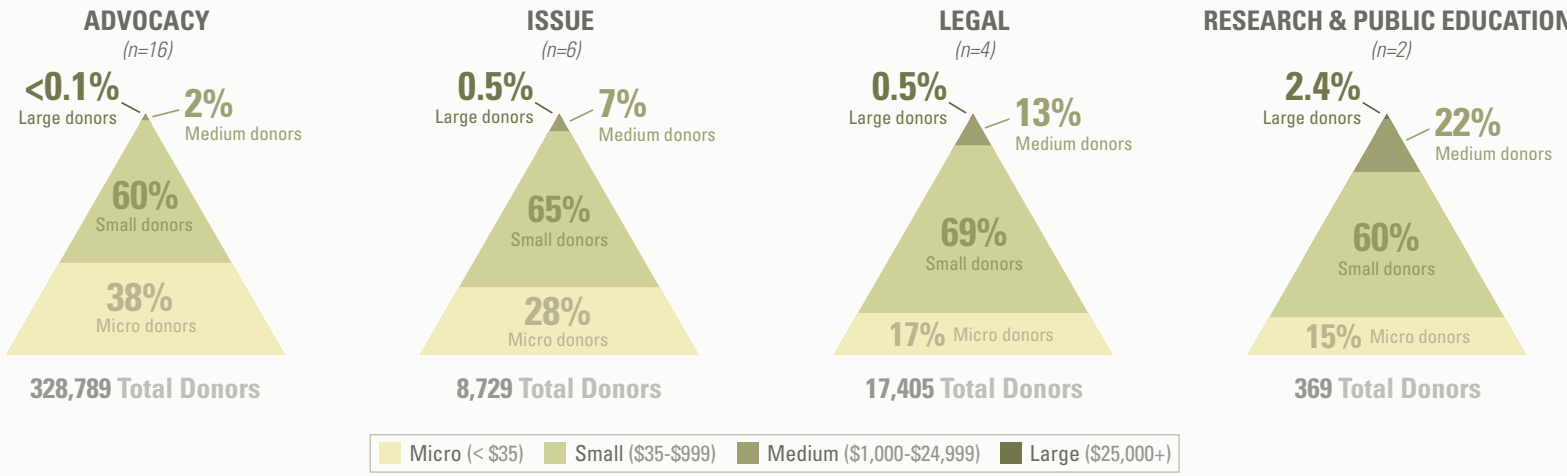


2021 PERCENT OF REVENUE FROM TOP TEN CONTRIBUTORS
(n=27)



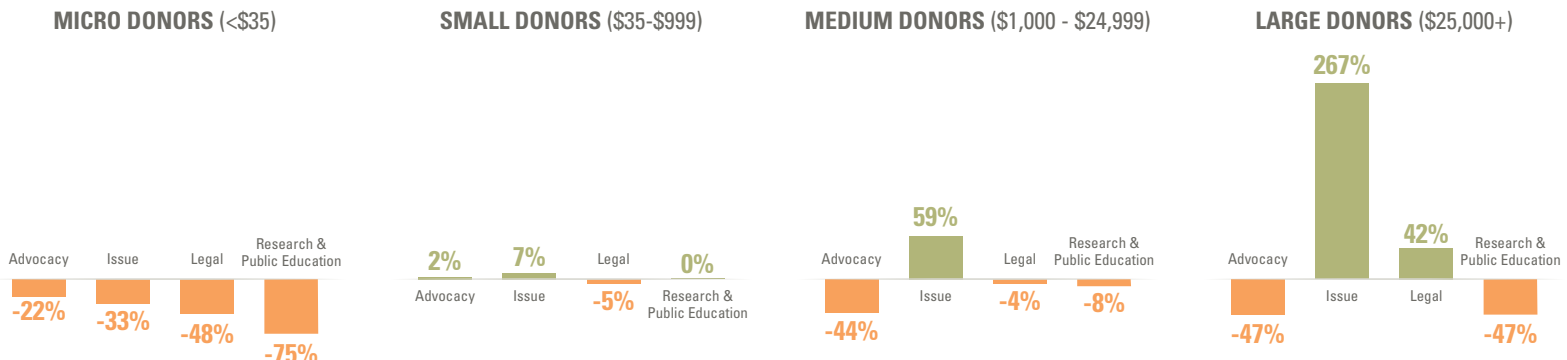
FOR ALL ORGANIZATIONS, MAJORITY OF INDIVIDUAL DONORS ARE SMALL OR MICRO DONORS

Number and Percent of Total Donors Giving At Various Levels in 2021



FROM 2020 TO 2021, ISSUE ORGANIZATIONS SAW INCREASES IN DONORS BY MOST DONATION SIZES, WHILE OTHER ORGANIZATION TYPES SAW DECLINES OR MIXED TRENDS

Change in Total Number of Donors from 2020 to 2021 (n=27)



2022 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

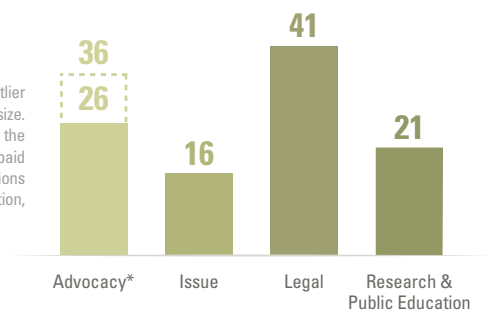


STAFF

Average staff size varies by organization type, with issue organizations having the lowest average staff size. Research organizations report the highest share of staff who are part-time workers. Both the average tenure of senior staff and the average compensation for senior staff vary widely across organization types.

AVERAGE NUMBER OF STAFF IS HIGHEST FOR LEGAL ORGANIZATIONS

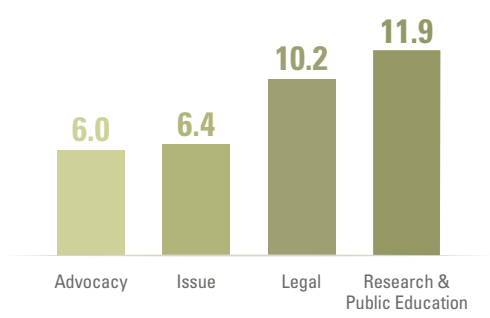
Average Number of Total Paid Staff (n=31)



*One organization is an outlier due to its large staff size. Excluding this organization, the average number of total paid staff at advocacy organizations is 26. Including this organization, the average is 36.

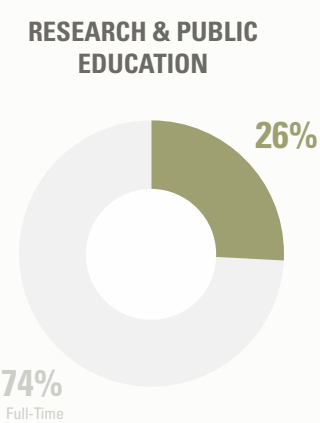
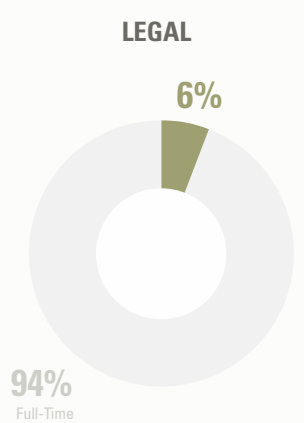
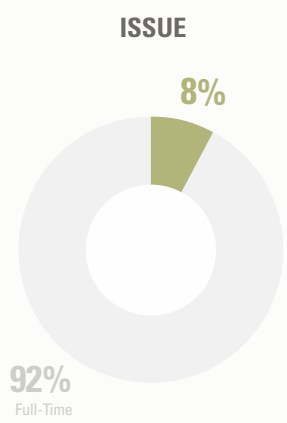
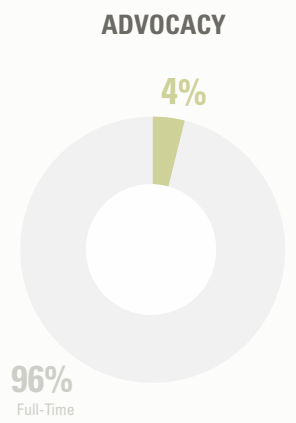
AVERAGE TENURE OF SENIOR MANAGEMENT IS LONGEST FOR RESEARCH & LEGAL ORGANIZATIONS

Average Senior Management Tenure, in Years (n=31)



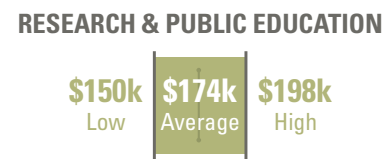
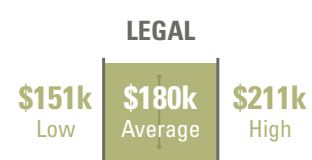
ORGANIZATION TYPES DIFFER IN THEIR USE OF PART-TIME STAFF

% of All Staff That Is Part-Time (n=31)



SENIOR STAFF COMPENSATION VARIES ACROSS ORGANIZATION TYPES

Average Senior Staff Compensation (n=30)



2022 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

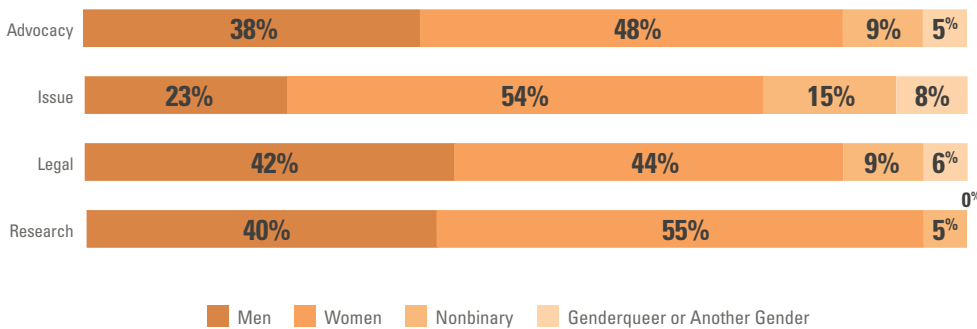


STAFF

Among organizations that provided staff demographic data, staff are demographically diverse across race, gender, sexual orientation, and age. Not all organizations provided these data or each type of data. Note that in some cases percentages may not add to 100 due to rounding.

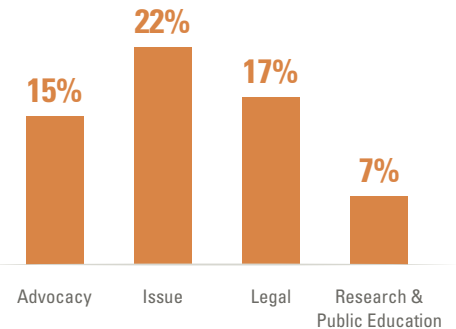
GENDER IDENTITY OF STAFF

% of Staff Identifying as... (n=31)



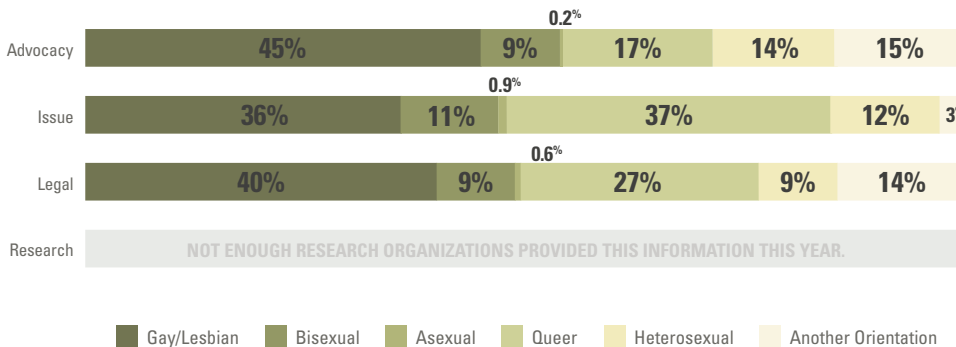
TRANSGENDER STATUS OF STAFF

% of Staff Identifying as Transgender (n=30)



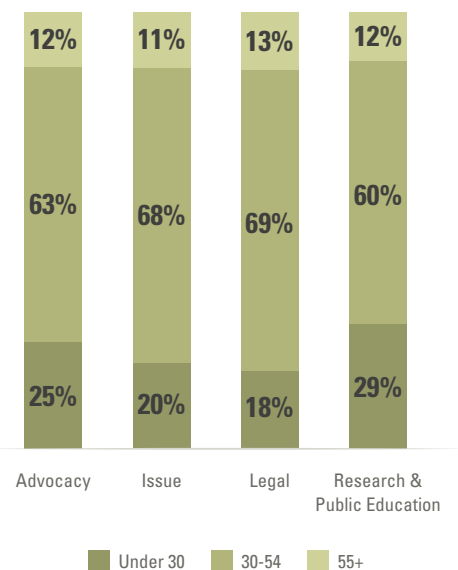
SEXUAL ORIENTATION OF STAFF

% of Staff Identifying as... (n=26)



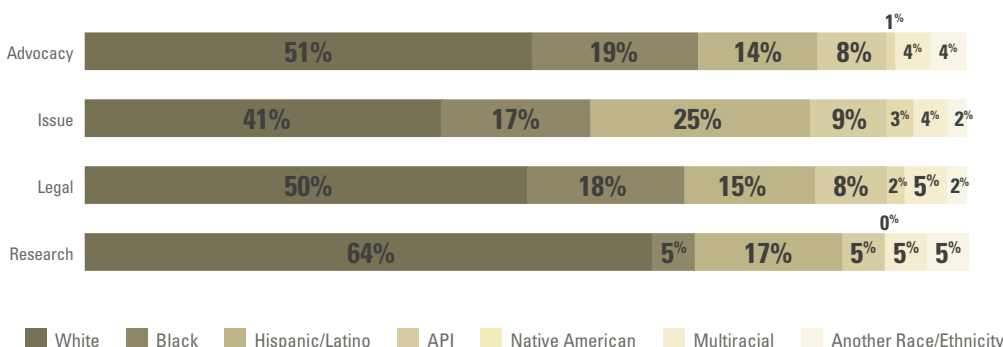
MAJORITIES OF STAFF ACROSS ORGANIZATION TYPES ARE AGES 30-54

% of All Staff in Each Age Range (n=31)



RACE/ETHNICITY OF STAFF

% of Staff Identifying as... (n=30)



2022 NATIONAL LGBTQI MOVEMENT REPORT

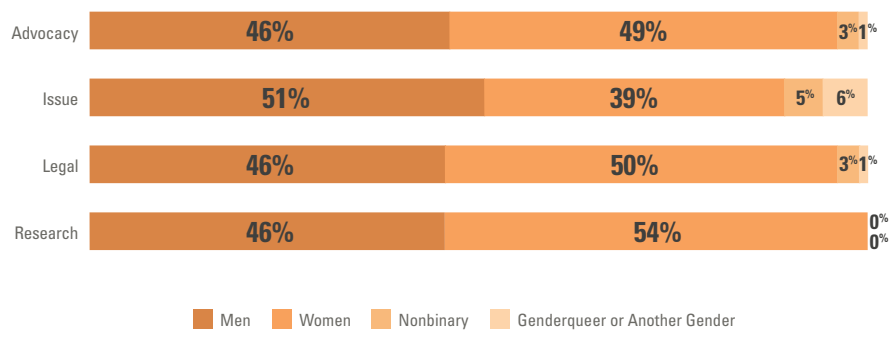
COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



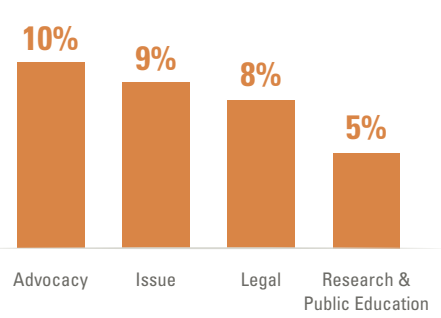
BOARDS

Among organizations that provided board demographic data, boards are demographically diverse across race, gender, and sexual orientation—though not as diverse as staff. Not all organizations provided these data or each type of data. Note that in some cases percentages may not add to 100 due to rounding.

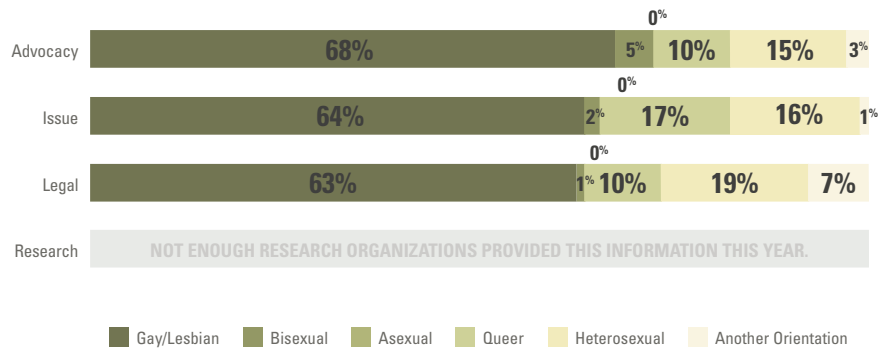
GENDER IDENTITY OF BOARD
(n=31)



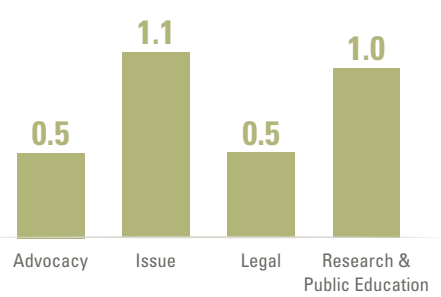
TRANSGENDER BOARD MEMBERS
% of Board Identifying As Transgender (n=30)



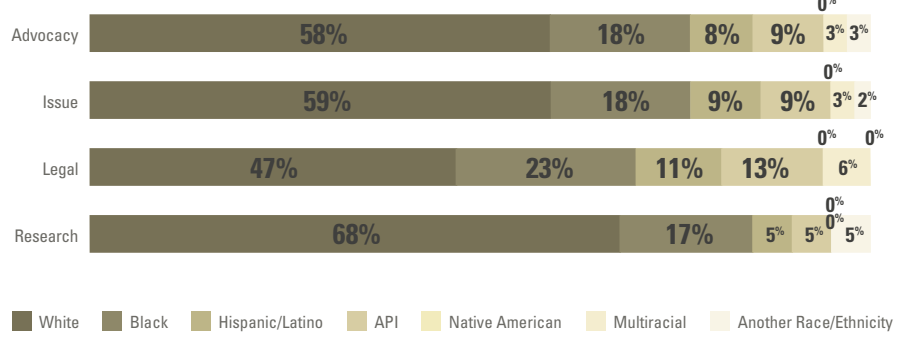
SEXUAL ORIENTATION OF BOARD
(n=27)



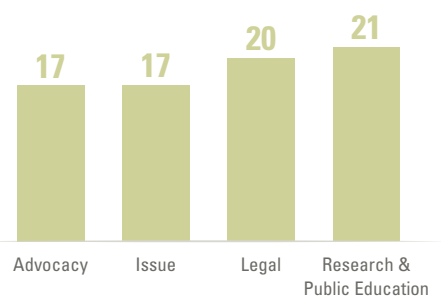
ISSUE & RESEARCH ORGANIZATIONS HAVE HIGHEST BOARD:STAFF RATIO
(n=31)



RACE/ETHNICITY OF BOARD
(n=30)



ORGANIZATIONS HAVE ROUGHLY SIMILAR AVERAGE NUMBER OF BOARD MEMBERS
Average Number of Board Members (n=31)



COMPOSITE PROFILE: ADVOCACY ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure (n=19)	C3	C4	PAC
(May not sum to 100 due to rounding)	(% of 2021 revenue)		
Basic Rights Oregon (BRO)	79%	21%	<1%
Campaign for Southern Equality (CSE)	100%		
Equality Federation (EQ Fed)	80%	20%	
Equality Florida (EQFL)	88%	12%	
Equality North Carolina (EQNC)	62%	38%	
Family Equality (FEQ)	100%		
Freedom For All Americans (FFAA)	69%	31%	
Georgia Equality (GAEQ)	86%	14%	
GLAAD	100%		
Human Rights Campaign and Federation (HRC)	31%	69%	
interACT	100%		
Keshet	100%		
LGBTQ Victory Fund and Leadership Institute (VF/VI)	48%		52%
National Center for Transgender Equality (NCTE)	100%		
National Queer Asian Pacific Islander Alliance (NQAPIA)	100%		
PFLAG National	100%		
Services and Advocacy for GLBT Elders (SAGE)	100%		
Task Force	100%		
True Colors United	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.

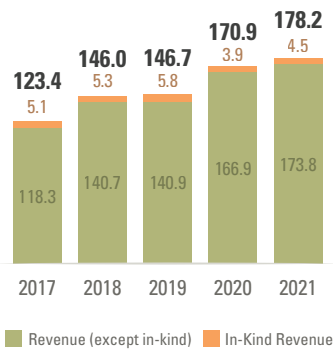


2021 performance on nonprofit watchdog benchmarks: All but three advocacy organizations (BRO, NCTE, and NQAPIA) met BBB benchmarks for program spending in 2021.

REVENUE, EXPENSES & BUDGET

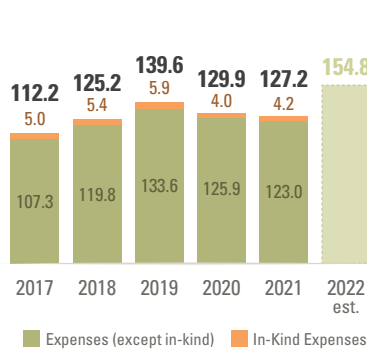
COMBINED REVENUE

\$ millions (n=19)



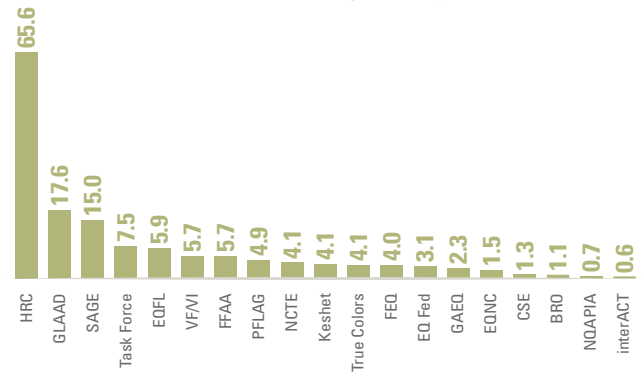
COMBINED EXPENSES

\$ millions (n=19)



MID-2022 BUDGET

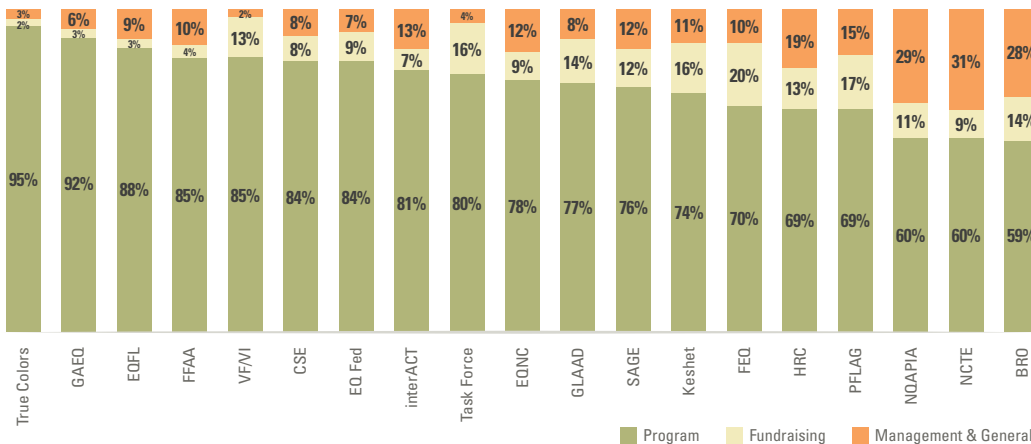
\$ millions, excluding in-kind expenses



Note: Only organizations that provided five years of data are included. Numbers may not sum due to rounding.

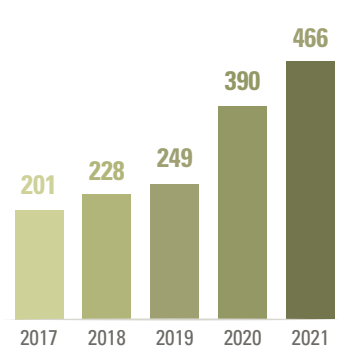
2021 EXPENSE BREAKDOWN

(may not sum to 100 due to rounding)



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS

(n=17)



Note: Only organizations that provided five years of data are included.

COMPOSITE PROFILE: ISSUE ORGANIZATIONS

PARTICIPATING ISSUE ORGANIZATIONS

Organizations and Legal Structure (n=10)	C3	C4	PAC
	(% of 2021 revenue)		
CenterLink	100%		
GLSEN	100%		
Genders and Sexualities Alliances Network (GSA)	100%		
Immigration Equality (Imm EQ)	99%	<1%	
New York City Anti-Violence Project (NYCAVP)	100%		
Out & Equal	100%		
Point Foundation	100%		
Reconciling Ministries Network (RMN)	100%		
Soulforce	100%		
The Trevor Project	100%		
True Colors	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.

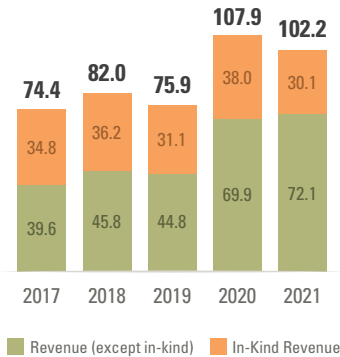


2021 performance on nonprofit watchdog benchmarks: All issue organizations, except Out & Equal, met BBB benchmarks for program spending in 2021.

REVENUE, EXPENSES & BUDGET

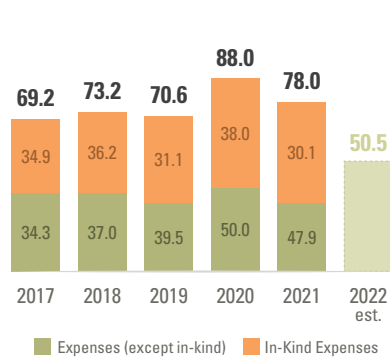
COMBINED REVENUE

\$ millions (n=10)



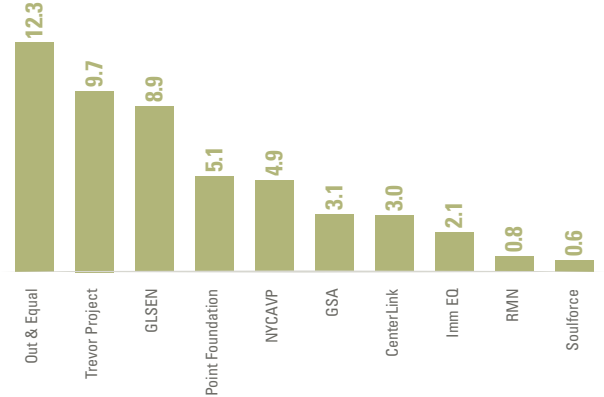
COMBINED EXPENSES

\$ millions (n=10)



MID-2022 BUDGET

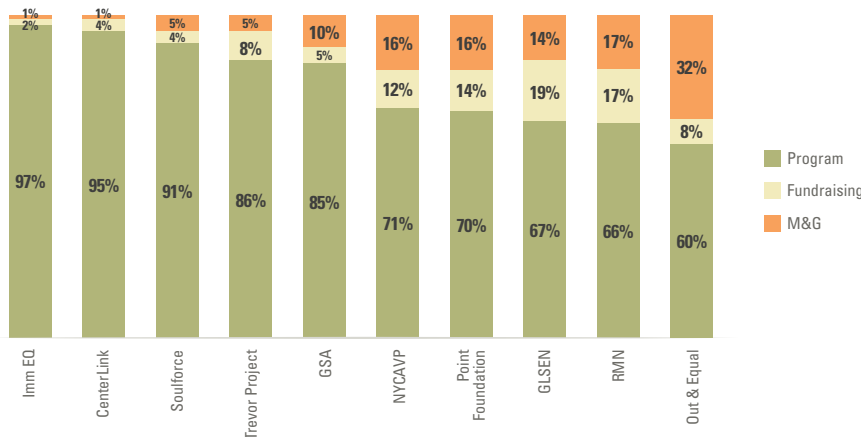
\$ millions, excluding in-kind expenses



Note: Only organizations that provided five years of data are included. Numbers may not sum due to rounding.

2021 EXPENSE BREAKDOWN

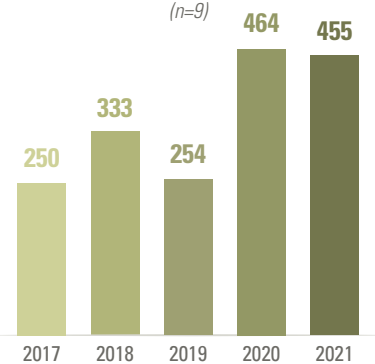
(may not sum to 100 due to rounding)



Note: Out & Equal did not provide these data for FY19.

AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS

(n=9)



Note: Only organizations that provided five years of data are included.

COMPOSITE PROFILE: LEGAL ORGANIZATIONS

PARTICIPATING LEGAL ORGANIZATIONS

Organizations and Legal Structure (n=5)	C3	C4	PAC
	(% of 2021 revenue)		
ACLU LGBT & HIV Project (ACLU)	100%		
GLBTQ Legal Advocates and Defenders (GLAD)	100%		
Lambda Legal (Lambda)	100%		
National Center for Lesbian Rights (NCLR)	100%		
Transgender Law Center (TLC)	100%		

Legal Organizations - Category Definition

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

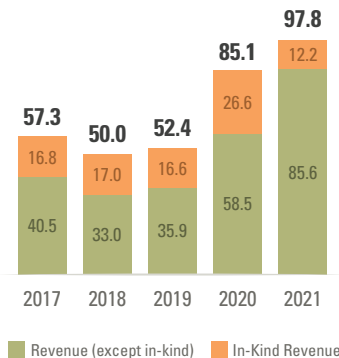


2021 performance on nonprofit watchdog benchmarks: All legal organizations met BBB benchmarks in 2021.

REVENUE, EXPENSES & BUDGET

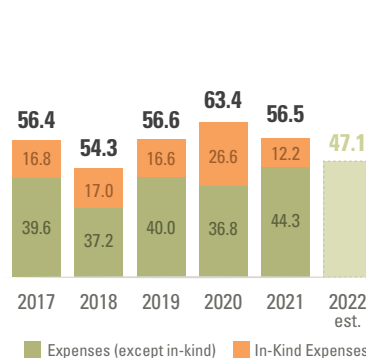
COMBINED REVENUE

\$ millions (n=5)



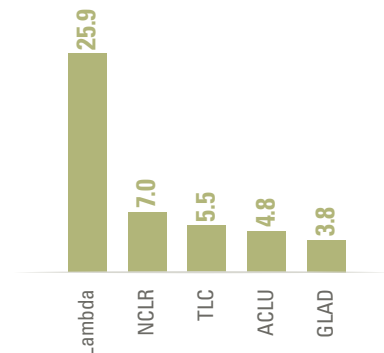
COMBINED EXPENSES

\$ millions (n=5)



MID-2022 BUDGET

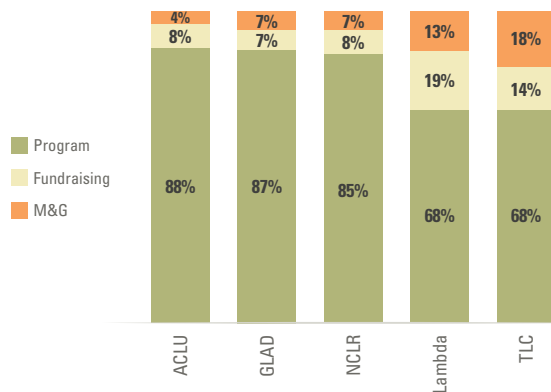
\$ millions, excluding in-kind expenses



Note: Only organizations that provided five years of data are included. Numbers may not sum due to rounding.

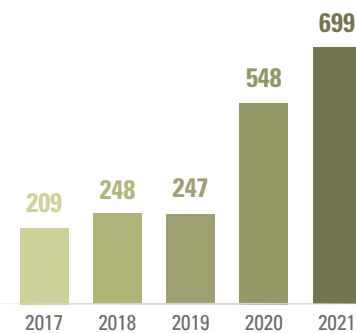
2021 EXPENSE BREAKDOWN

(may not sum to 100 due to rounding)



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS

(n=4)



Note: Only organizations that provided five years of data are included.

COMPOSITE PROFILE: RESEARCH & PUBLIC EDUCATION ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure (n=2)	C3	C4	PAC
	(% of 2021 revenue)		
Movement Advancement Project (MAP)	92%	8%	
Williams Institute (Williams)	100%		

Research & Public Education Organizations - Category Definition

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

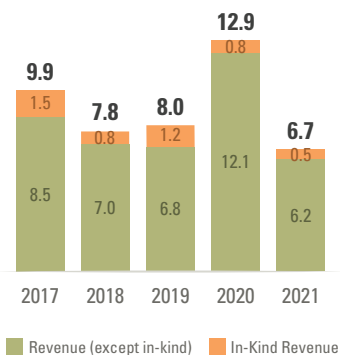


2021 performance on nonprofit watchdog benchmarks: All research and public education organizations met AIP and BBB benchmarks in 2021.

REVENUE, EXPENSES & BUDGET

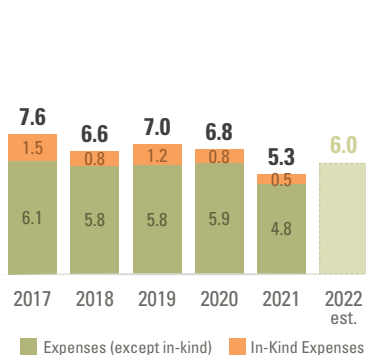
COMBINED REVENUE

\$ millions (n=2)



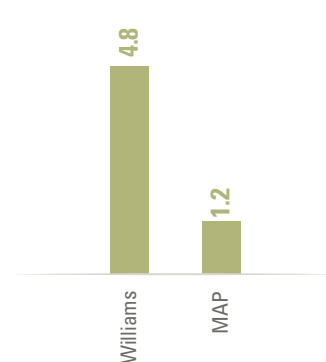
COMBINED EXPENSES

\$ millions (n=2)



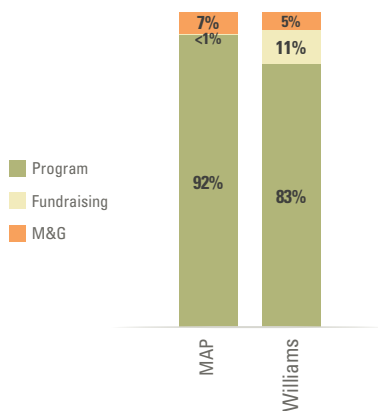
MID-2022 BUDGET

\$ millions, excluding in-kind expenses



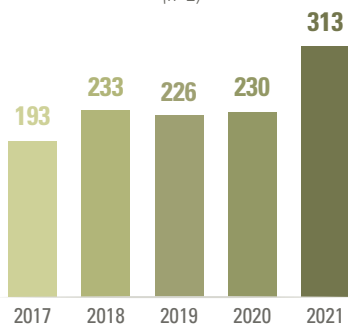
Note: Only organizations that provided five years of data are included. Numbers may not sum due to rounding.

2021 EXPENSE BREAKDOWN



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS

(n=2)



Note: Only organizations that provided five years of data are included.

ABOUT THIS REPORT

The National LGBTQI 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, queer, and intersex (LGBTQI) advocacy, issue, legal, and research and public education organizations.



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