

2019 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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Weston Milliken
Ineke Mushovic
The Palette Fund
Mona Pittenger
H. van Ameringen Foundation
Wild Geese Foundation

New this year, an intersex-focused organization participated, so we've updated the report to reflect their participation (e.g. LGBTQI).

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KEY FINDINGS

This confidential supplement to the *2019 National LGBTQI Movement Report* takes a deeper look at the 40 major LGBTQI organizations participating in the 2019 Standard Annual Reporting project (SAR).

Revenue and Expenses

Participating organizations as a whole reported a 10% increase in revenue (excluding in-kind contributions) and a 8% increase in total combined revenue (including in-kind) from 2017 to 2018. Issue organizations saw the greatest increase in revenue (37% excluding in-kind), followed by advocacy organizations (11%). Both legal and research and public education organizations reported decreases in revenue from 2017 to 2018 (-19% and -11%, respectively).

Primary revenue sources varied by organizational type. Advocacy organizations relied more on individual contributions (45% of total revenue) than any other organization type. Issue organizations relied most heavily on in-kind contributions (35% of total revenue), though legal organizations also relied on in-kind contributions for nearly one-third (33%) of their 2018 revenue. Research and public education organizations relied heavily on foundation contributions (55% of total revenue).

Organizations predict an aggregate 14% increase in expenditures from 2018 to 2019. Advocacy organizations anticipate the greatest increase (19%), followed by issue organizations (15%). Legal (1%) 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 2017 and 2018. All organization types rely heavily on small donors (those giving between \$35 and \$999 in one year), though “microdonors” (giving less than \$35 in one year) comprise the largest share of donors to issue organization. That said, from 2017 to 2018, advocacy organizations were the only organization type to report an increase across small, medium, and large donors. By contrast, issue organizations reported a decrease across small, medium, and large donors. Legal and research and public education organizations both reported increases in medium and large donors but a decrease in small 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 (60%). Advocacy (42%) and legal (42%) organizations reported similar proportions of revenue from top ten contributors, while issue organizations (34%) 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 \$0.16 to raise \$1. Research and public education organizations had the lowest cost, at an average \$0.06 to raise \$1. Both advocacy and issue organizations averaged \$0.13 to raise \$1.

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 52% identifying as people of color. Legal organizations reported 27% 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 ranges from \$120,600 to 151,400. 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 17 to 21 members. However, research and public education organizations had a board-to-staff ratio nearly twice as high as other organizations.

2019 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

METHODOLOGY

This confidential supplement to the *2019 National LGBTQI Movement Report* takes a deeper look at the 40 major LGBTQI organizations participating in the 2019 Standard Annual Reporting project (SAR).

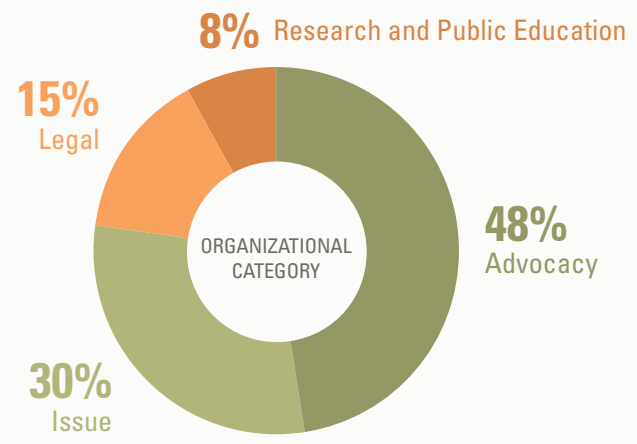
The Movement Advancement Project (MAP) selected participating organizations based on their size, importance to the overall LGBTQI movement, and collective coverage of LGBTQI issues and constituencies. Most participating organizations (33) have budgets over \$1 million; seven organizations have smaller 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 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 2018 REVENUE = \$299.3M, TOTAL 2018 EXPENSES = \$269.8M

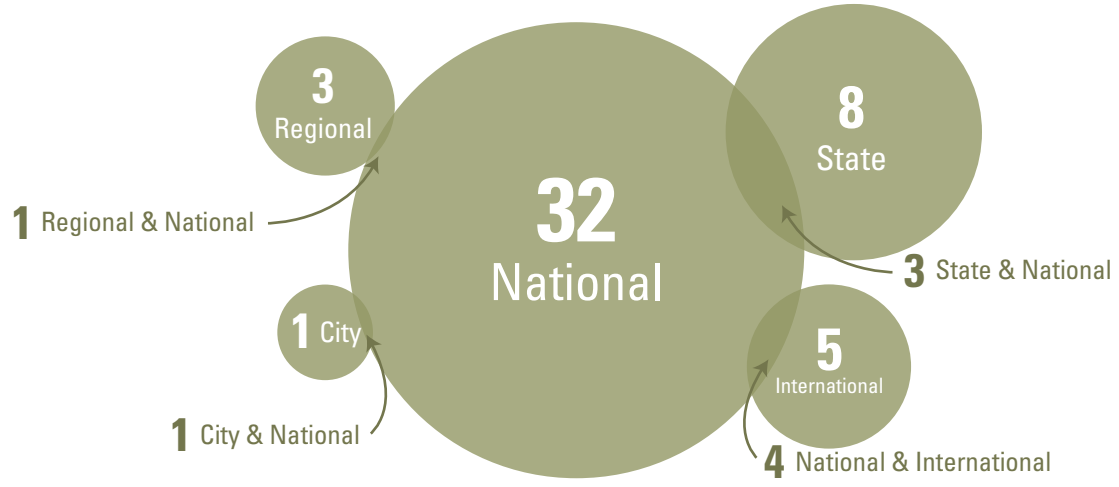
PARTICIPATING LGBTQI ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=40)

- 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; 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 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.

2019 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



REVENUE

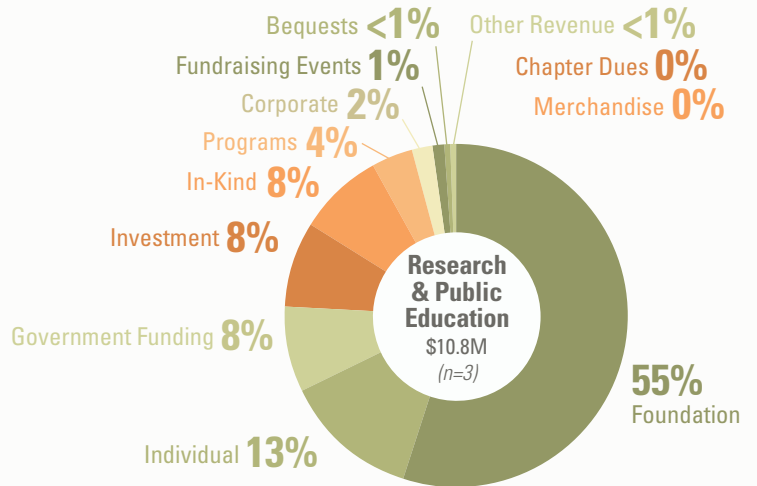
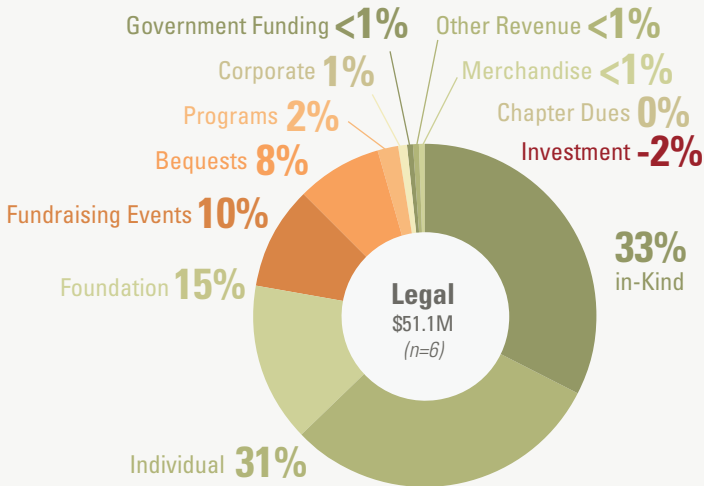
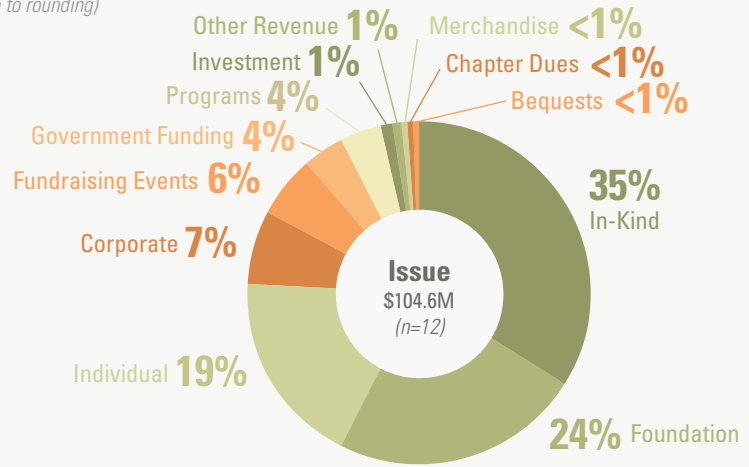
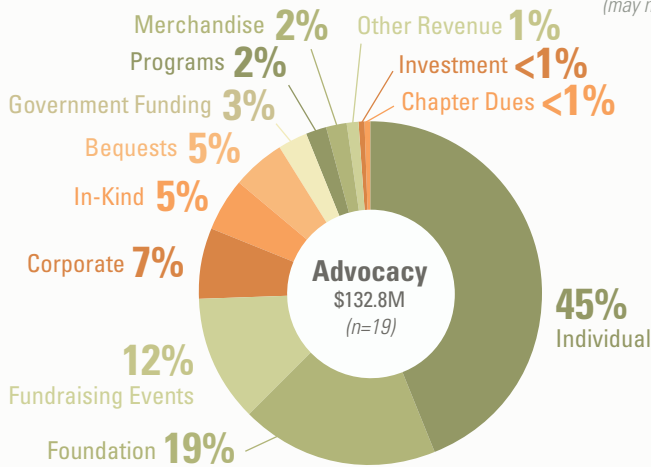
Participating organizations reported an aggregate 10% increase in revenue excluding in-kind contributions from 2017 to 2018, and an 8% increase in total combined revenue (including in-kind). Issue organizations saw the greatest increase in revenue, followed by advocacy organizations. Legal and research and public education organizations both reported decreases in revenue excluding 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 2018 revenue. Research and public education organizations relied heavily on foundation contributions.

ALL PARTICIPANTS (N=40), TOTAL 2018 REVENUE = \$299.3M, TOTAL 2018 EXPENSES = \$269.8M

ORGANIZATIONS HAVE DIVERSE REVENUE STREAMS

2018 Revenue By Source

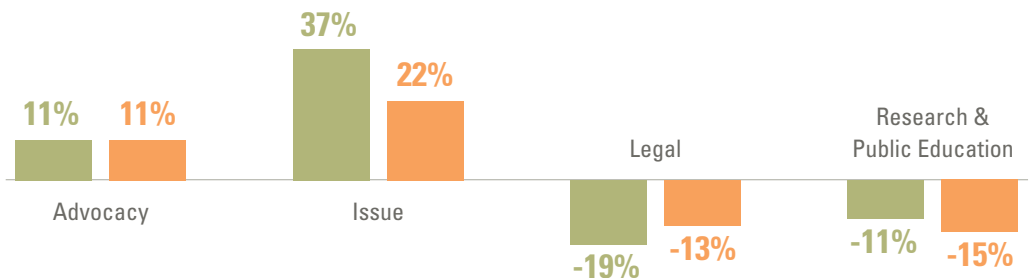
(may not sum to 100 due to rounding)



PERCENT CHANGE IN REVENUE FROM 2017 TO 2018

All Participants (n=40)

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



2019 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

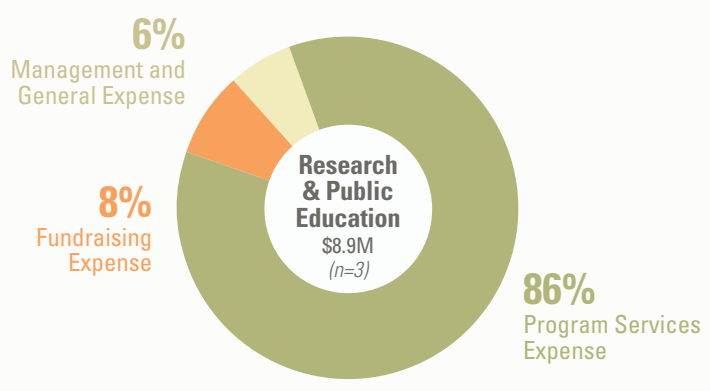
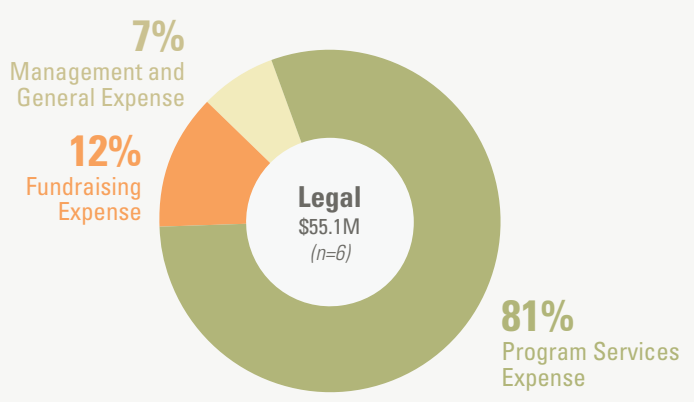
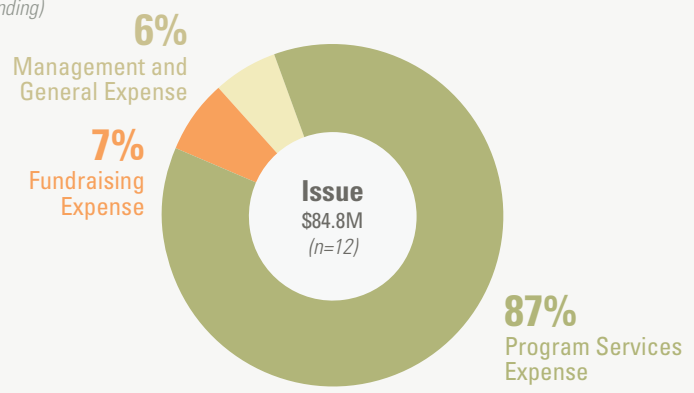
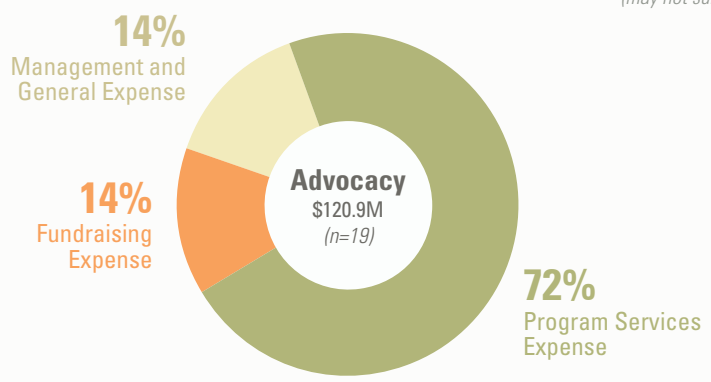
EXPENSES

Organizations cumulatively predict a 14% increase in expenditures from 2018 to 2019. 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.

ALL PARTICIPANTS (N=40), TOTAL 2018 REVENUE = \$299.3M, TOTAL 2018 EXPENSES = \$269.8M

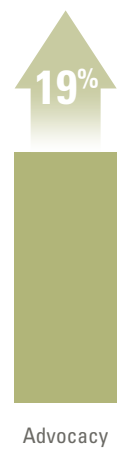
ORGANIZATIONS, REGARDLESS OF TYPE, MEET NONPROFIT STANDARDS FOR PROGRAM SPENDING

2018 Expenses By Expense Category
 (may not sum to 100 due to rounding)



ORGANIZATIONS PROJECT 14% AVERAGE INCREASE IN EXPENSES FROM 2018 TO 2019, VARIED BY ORGANIZATION TYPES

% Change from 2018 Expenses (Excluding In-Kind Expenses) to 2019 Projected Budgets



2019 NATIONAL LGBTQI MOVEMENT REPORT

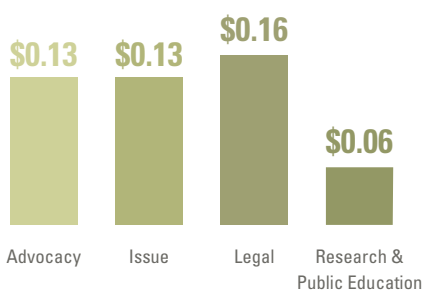
COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



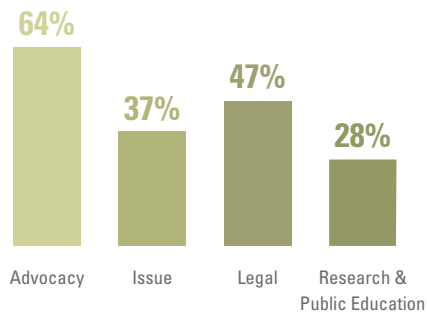
FUNDRAISING

The average fundraising cost to raise one dollar varies by organization type but remains generally efficient. Organizations reported mixed success with donor retention from 2017 to 2018, 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 "microdonors" (less than \$35), medium donors (\$1,000-\$24,999), and large donors (\$25,000+) also play a key role in all organizations' revenue. From 2017 to 2018, advocacy organizations were the only organization type to report an increase in small, medium, and large donors.

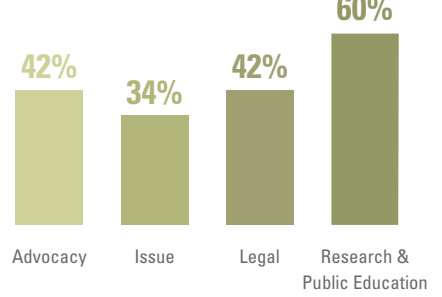
2018 AVERAGE FUNDRAISING EXPENSE TO RAISE \$1



2018 AVERAGE DONOR TURNOVER (n=39)

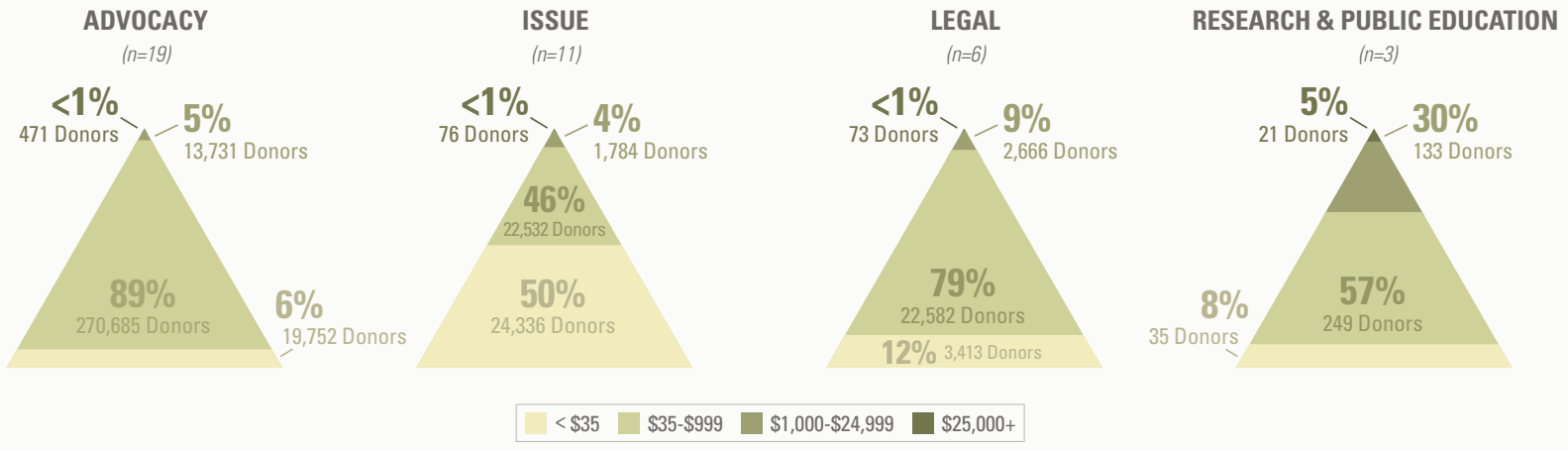


2018 PERCENT OF REVENUE FROM TOP TEN CONTRIBUTORS (n=39)



ORGANIZATIONS RELY ON SMALL, MEDIUM, AND LARGE DONORS

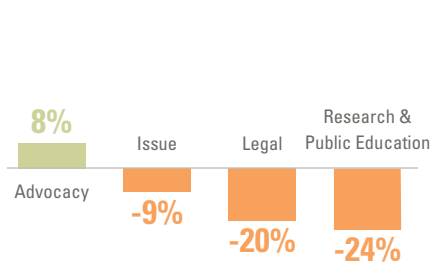
Number and Percent of Total Donors Giving At Various Levels Per Year



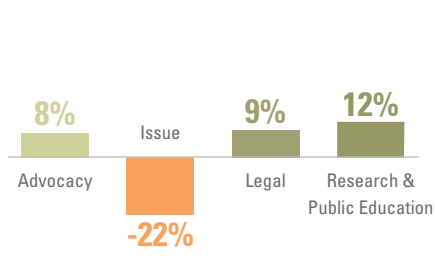
FROM 2017 TO 2018, ADVOCACY ORGANIZATIONS SAW INCREASES IN ALL DONATION SIZES; OTHER ORGANIZATIONS HAD MIXED EXPERIENCES

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

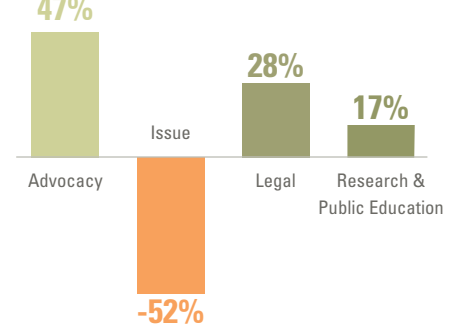
DONORS GIVING > \$35



DONORS GIVING > \$1,000



DONORS GIVING > \$25,000



Note: Trend data for "microdonors" (giving less than \$35) is not available for 2017-2018.

2019 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

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

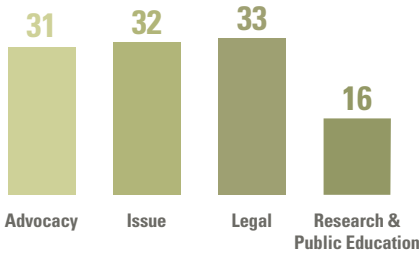


STAFF

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.

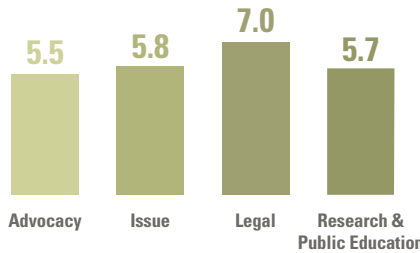
AVERAGE NUMBER OF STAFF IS HIGHEST FOR LEGAL ORGANIZATIONS

Average Number of Total Paid Staff (n=39)



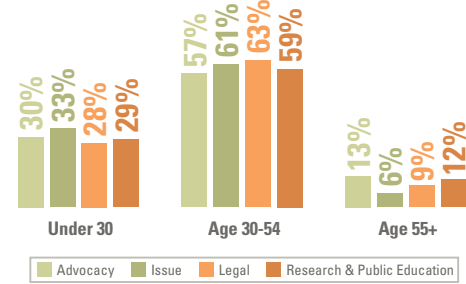
TENURE OF SENIOR MANAGEMENT IS LONGEST FOR RESEARCH & LEGAL ORGANIZATIONS

Average Senior Management Tenure, in Years (n=35)



MAJORITIES OF STAFF ACROSS ORGANIZATION TYPES ARE AGES 30-54

Average Age of Staff (n=37)

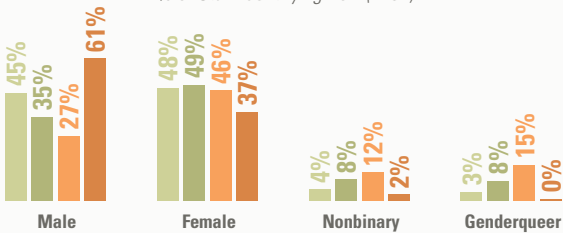


ISSUE ORGANIZATIONS REPORT GREATEST STAFF DIVERSITY BY GENDER, RACE/ETHNICITY; SEXUAL ORIENTATION DEMOGRAPHICS VARY BY ORGANIZATION TYPE

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

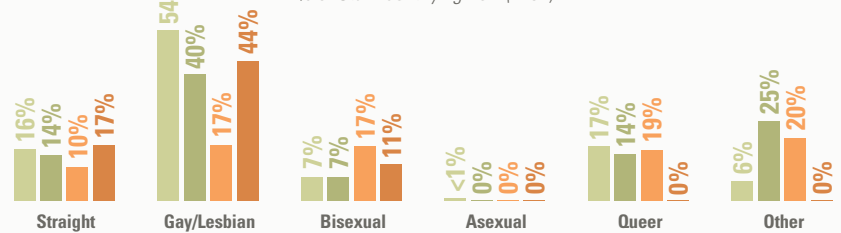
GENDER

% of Staff Identifying As... (n=37)



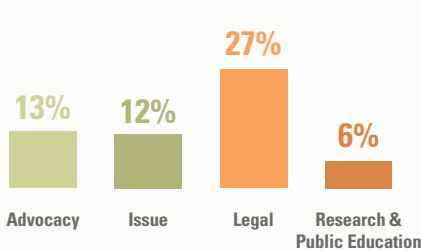
SEXUAL ORIENTATION

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



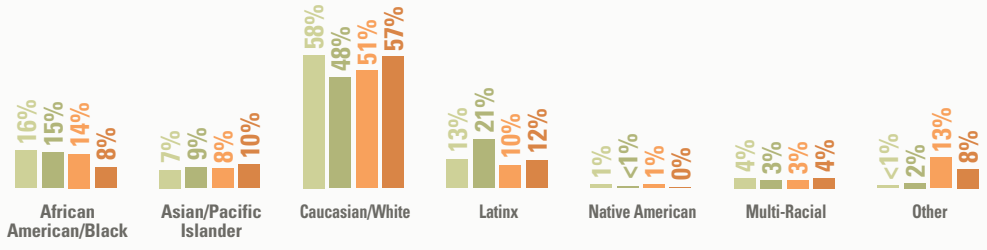
TRANSGENDER

% of Staff Identifying As Transgender (n=35)



RACE/ETHNICITY

% of Staff Identifying As... (n=36)



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

Average Senior Staff Compensation (n=36)



2019 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

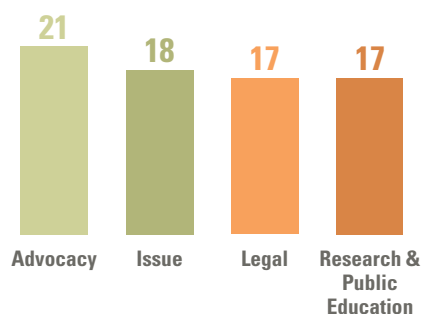


BOARDS

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 17 to 21 members, but research and public education organizations had a board-to-staff ratio nearly twice as high as other organizations.

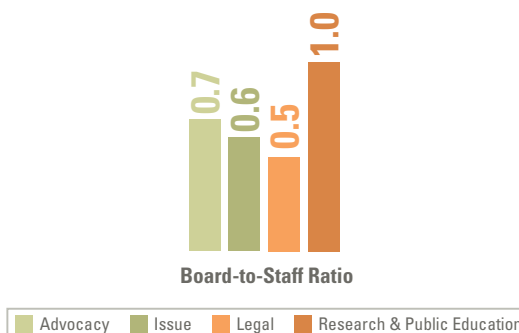
ORGANIZATIONS HAVE ROUGHLY THE SAME AVERAGE NUMBER OF BOARD MEMBERS

Average Number of Board Members (n=39)



RESEARCH & PUBLIC EDUCATION ORGANIZATIONS HAVE HIGHEST BOARD:STAFF RATIO

2017 Board, Staff, and Board:Staff Ratio (n=39)

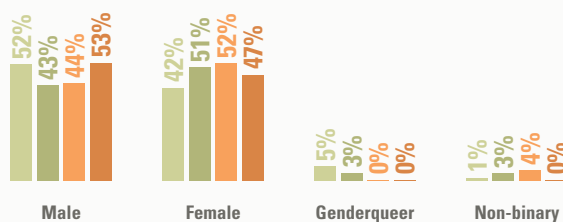


BOARD DIVERSITY VARIES BY ORGANIZATION TYPE

% of Board Identifying as Each Demographic Category

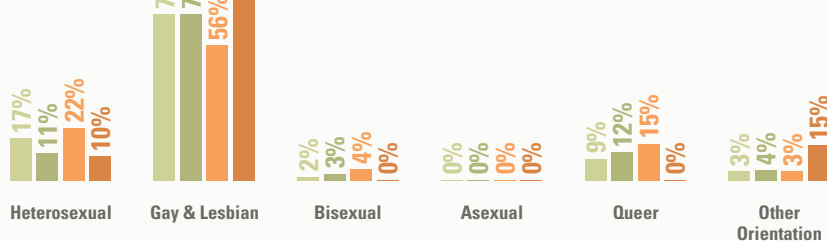
GENDER

% of Board Identifying As... (n=37)



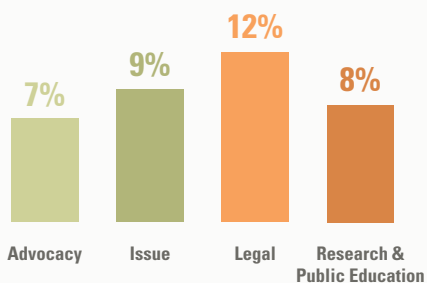
SEXUAL ORIENTATION

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



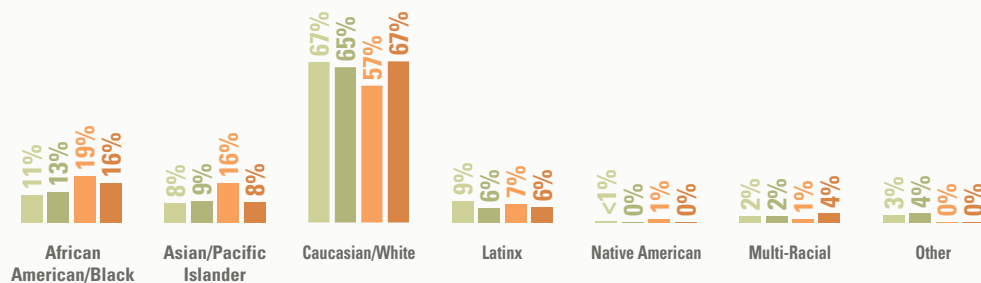
TRANSGENDER BOARD MEMBERS

% of Board Identifying As Transgender (n=37)



RACE/ETHNICITY

% of Board Identifying As... (n=31)



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COMPOSITE PROFILE: ADVOCACY ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure	C3	C4	PAC
	(% of 2018 revenue)		
Basic Rights Oregon (BRO)	74%	23%	3%
Campaign for Southern Equality (CSE)	100%		
Equality California (EqCA)	38%	62%	
Equality Federation (EQ Fed)	94%	6%	
Equality Florida (EqFL)	90%	5%	5%
Equality North Carolina (EqNC)	33%	67%	
Family Equality Council (FEC)	100%		
Freedom For All Americans (FFAA)	86%	14%	
Gay & Lesbian Victory Fund and Leadership Institute (Victory Fund/GLVI)	53%		47%
Human Rights Campaign and Federation (HRC)	27%	73%	
interACT	100%		
Keshet	100%		
MassEquality	59%	41%	
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	97%	3%	

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.

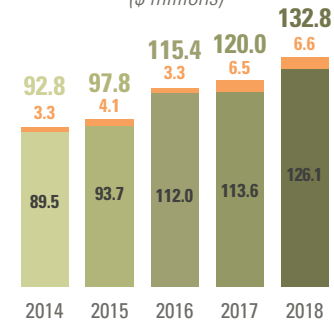


2018 performance on charity watchdog benchmarks: All advocacy organizations, except PFLAG, met BBB benchmarks for program spending in 2018.

REVENUE, EXPENSES & BUDGET

COMBINED REVENUE

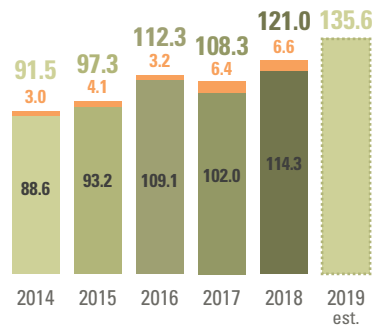
(\$ millions)



Revenue (except in-kind) In-Kind Revenue

COMBINED EXPENSES

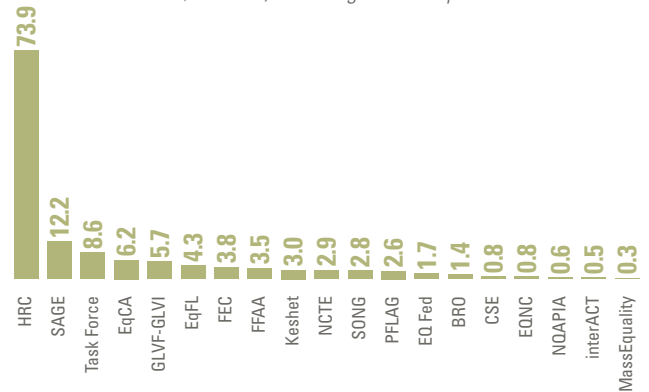
(\$ millions)



Expenses (except in-kind) In-Kind Expenses

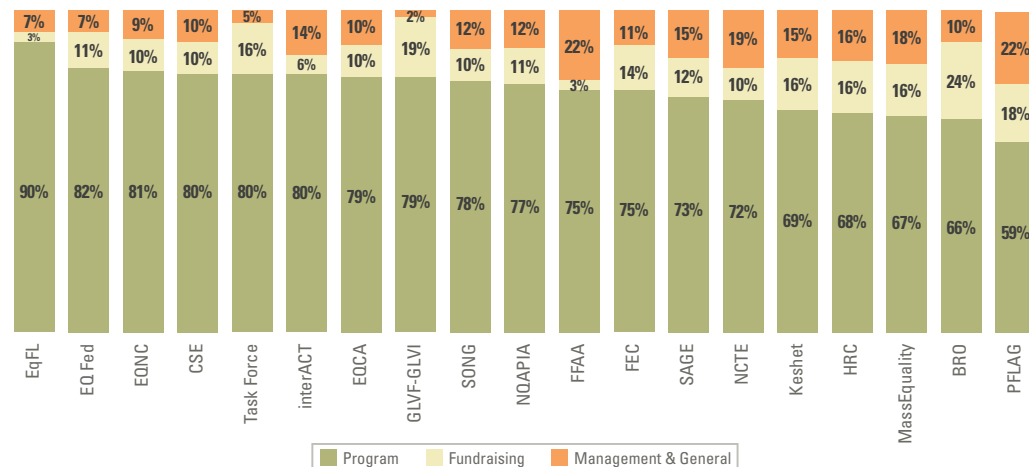
2019 BUDGET

\$ millions, excluding in-kind expenses

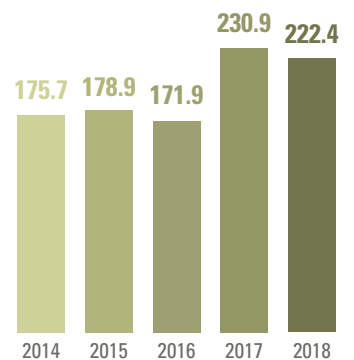


EXPENSE BREAKDOWN

(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 2018 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%		
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.

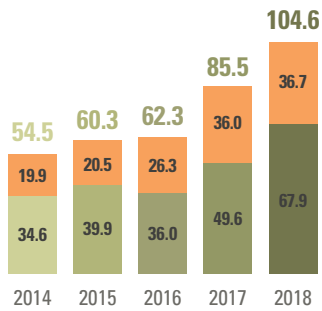


2018 performance on charity watchdog benchmarks: All issue organizations, except Soulforce, met BBB benchmarks for program spending in 2018.

REVENUE, EXPENSES & BUDGET

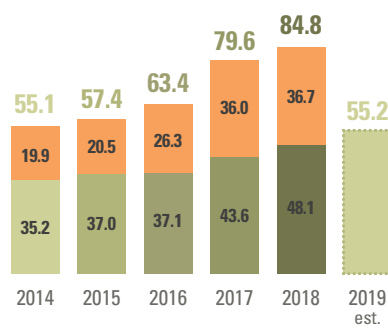
COMBINED REVENUE

(\$ millions)



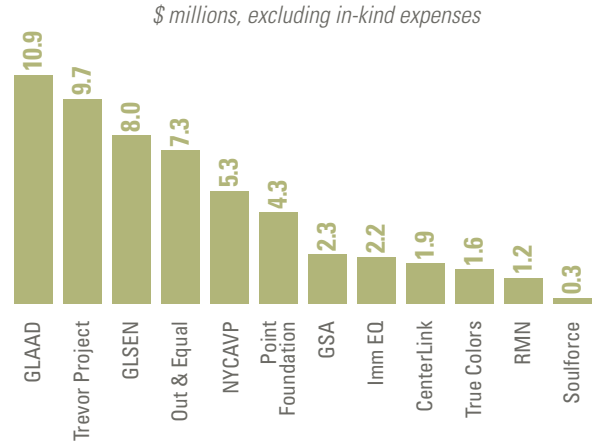
COMBINED EXPENSES

(\$ millions)



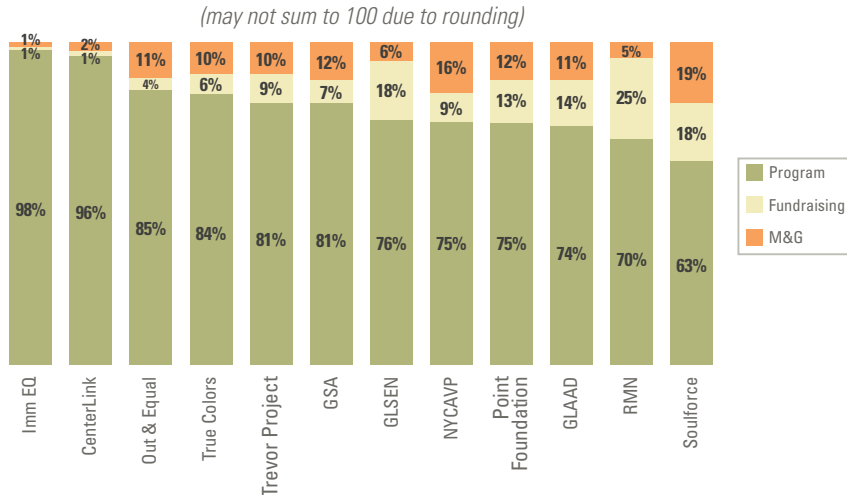
2019 BUDGET

\$ millions, excluding in-kind expenses

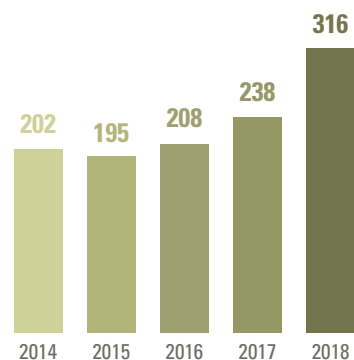


EXPENSE BREAKDOWN

(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 2018 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

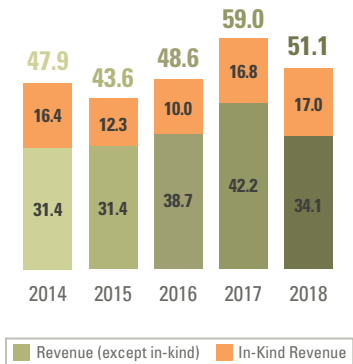
Legal organizations work to achieve full civil legal rights for LGBTQI people through litigation, policy advocacy, public education, and coalition building.



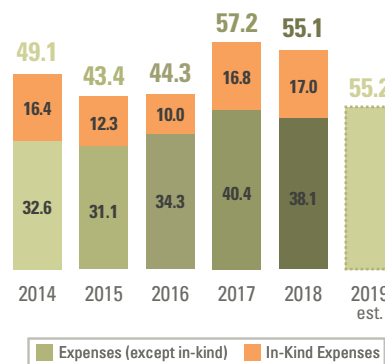
2018 performance on charity watchdog benchmarks: All legal organizations met AIP and BBB benchmarks in 2018.

REVENUE, EXPENSES & BUDGET

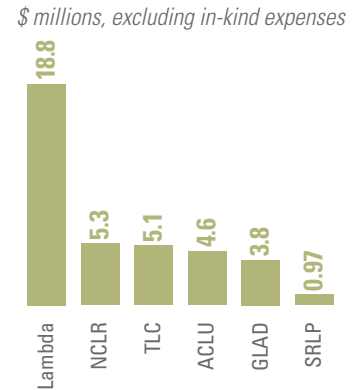
COMBINED REVENUE (\$ millions)



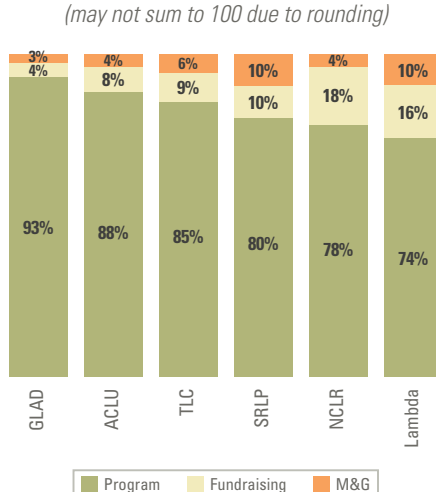
COMBINED EXPENSES (\$ millions)



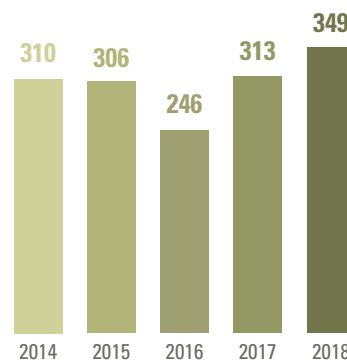
2019 BUDGET \$ millions, excluding in-kind expenses



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: RESEARCH & PUBLIC EDUCATION ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure	C3	C4	PAC
	(% of 2018 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 LGBTQI movement and the general public on the social and economic status and needs of LGBTQI people.

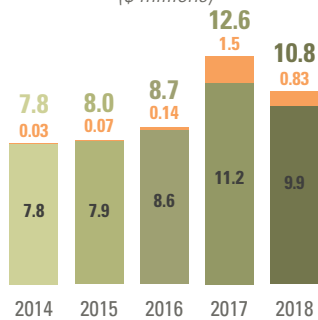


2018 performance on charity watchdog benchmarks: All research and public education organizations met AIP and BBB benchmarks in 2018.

REVENUE, EXPENSES & BUDGET

COMBINED REVENUE

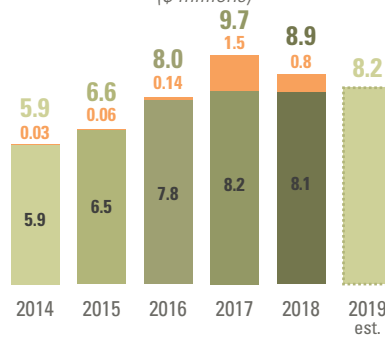
(\$ millions)



Revenue (except in-kind) In-Kind Revenue

COMBINED EXPENSES

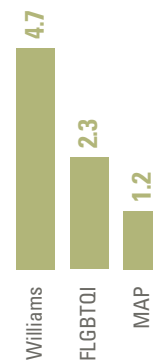
(\$ millions)



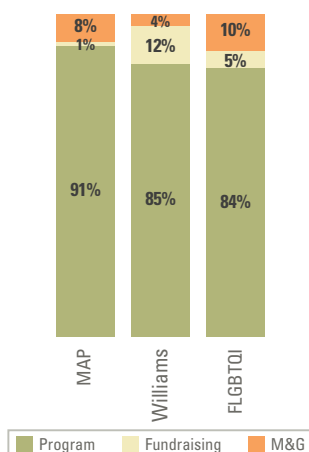
Expenses (except in-kind) In-Kind Expenses

2019 BUDGET

\$ millions, excluding in-kind expenses

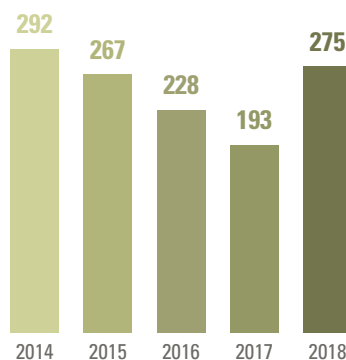


EXPENSE BREAKDOWN



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.

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.



movement advancement project ▶

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