

2020 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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KEY FINDINGS

This confidential supplement to the *2020 National LGBTQI Movement Report* takes a deeper look at the 39 major LGBTQI organizations participating in the 2020 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 2018 to 2019, participating organizations as a whole reported a 3% increase in revenue (excluding in-kind). Including in-kind, combined revenue increased 1%. Issue organizations saw the greatest increase in revenue (14%, excluding in-kind), followed by legal organizations (9%). Advocacy organizations reported a nearly flat change (0.04% increase), while research and public education organizations reported a 10% decrease in revenue from 2018 to 2019.

Primary revenue sources varied by organizational type. Advocacy organizations relied more on individual contributions (44% of total 2019 revenue) than any other organization type. Issue organizations relied most heavily on in-kind contributions (41% of total revenue), as did legal organizations (32%). Research and public education organizations relied on foundation contributions for their primary source of revenue (48% of total revenue).

Organizations predict an aggregate 1% increase in expenditures from 2019 to 2020 (as of mid-2020).¹ Advocacy organizations are the only type to anticipate an increase (7%), while all others project a decrease, reflecting the ongoing impacts of the COVID-19 pandemic as well as other factors. Issue and legal organizations both project a 9% decrease, while research organizations predict a 6% decrease.

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), as these donors comprise over 90% of donors to each organization type. Advocacy organizations have the largest share of micro donors, with 43% of donors to advocacy organizations giving at this level in 2019. Legal organizations have the largest share of small donors, with 65% of donors to legal organizations giving at this

level. Research and public education organizations report the largest share of both “medium” (\$1,000-\$24,999 in one year) and “large” (\$25,000 or more) donors.

From 2018 to 2019, each organization type reported a unique trend in individual donor giving by donor size. Advocacy organizations reported a minor decrease in the number of small donors, but an increase in both medium and large donors. Issue organizations had significant increases in small and large donors, but decreases in medium donors. Research organizations reported decreases in the number of small, 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 (59%). Advocacy (43%) and legal (41%) organizations reported similar proportions of revenue from top ten contributors, while issue organizations (32%) 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 of \$0.20 to raise \$1. Research and public education organizations had the lowest cost, at an average of \$0.08 to raise \$1. Advocacy organizations averaged \$0.12 and issue organizations averaged \$0.14 to raise \$1.

Staff and Boards

Advocacy, issue, and legal organizations have roughly similar average staff sizes, ranging from 32 to 38 staff. In contrast, research and public education organizations have an average staff roughly half that, at 17 staff members. While average staff size varies, average board size is relatively similar across organization types, ranging from 17 to 20 members. However, research and public education organizations had a board-to-staff ratio nearly twice as high as other organizations.

Generally, the vast majority of staff at participating organizations are full-time employees, but this varies by organization type. Research and public education organizations are again distinct from other types, with 25% of staff at research organizations being part-time, compared to 3% at issue organizations and 7% at advocacy and legal organizations.

¹ Participating organizations submitted their financial data over the late summer and early fall of 2020. These numbers will likely continue to change as the pandemic and its economic impacts continue.

Average senior staff compensation ranges from \$130,800 at advocacy organizations to \$172,600 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, and this diversity follows unique trends across different organization types. Issue organizations are the only type with a majority of staff (62%) being people of color, while advocacy organizations have the lowest share of staff who are people of color (43%).² Legal organizations reported 24% of staff are transgender, the highest of any organization type.³ Research and public education organizations were the only type where the majority of staff (51%) are women. Sexual orientation diversity was more varied by organization type. Overall, participating organizations report diverse boards, but generally less diverse than their staff.

² According to the U.S. Census, in 2019, people of color comprised 39.9% of the U.S. population. This includes 13.4% who were Black or African American alone, 18.5% who were Hispanic or Latino, 6.1% who were Asian or Pacific Islander alone, and 1.3% who were Native American alone.

³ Nationally, an estimated 0.6% of the adult population identifies as transgender. See Andrew Flores, Jody Herman, Gary Gates, and Taylor Brown's (2016) *How Many Adults Identify as Transgender in the United States?*

2020 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

METHODOLOGY

This confidential supplement to the *2020 National LGBTQI Movement Report* takes a deeper look at the 39 major LGBTQI organizations participating in the 2020 Standard Annual Reporting (SAR) project, reporting on fiscal year 2019. 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 (35) 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 format. Where figures or charts reflect data based on a subset of participating organizations, this is noted.

38 PARTICIPANTS, TOTAL 2019 REVENUE = \$294.4M, TOTAL 2019 EXPENSES = \$283.9M

Note: One participant is changing fiscal year rotation and was not able to provide full fiscal year 2019 data for some questions.

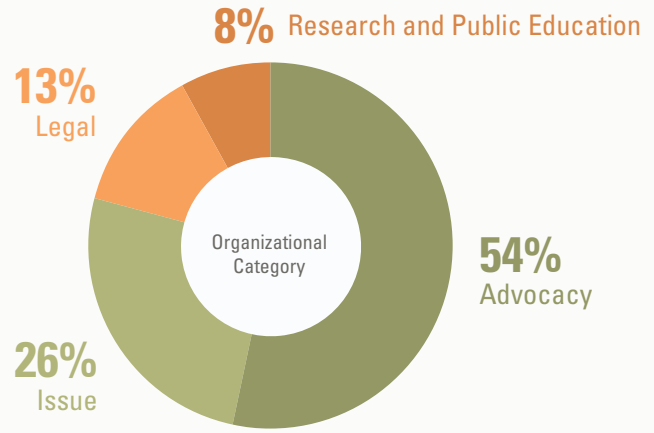
PARTICIPATING LGBTQI ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=39)

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.



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.

2020 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE



REVENUE

Primary revenue sources varied by organizational type. Advocacy organizations relied more on individual contributions than any other organization type. Issue and legal organizations relied most heavily on in-kind contributions, while research and public education organizations relied primarily on foundation contributions.

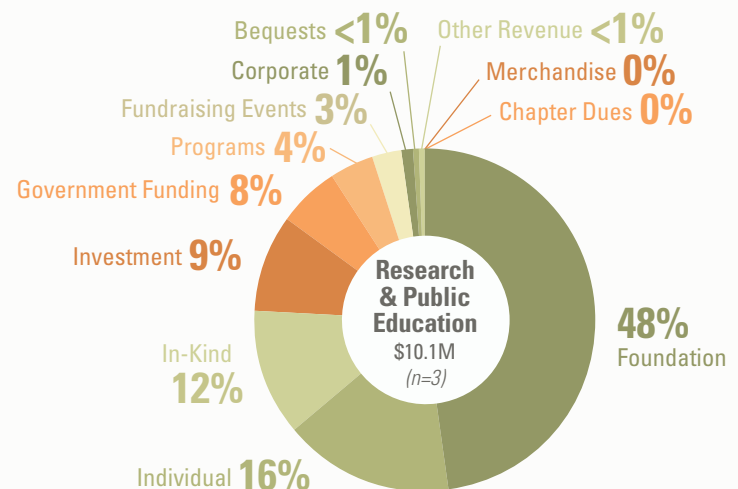
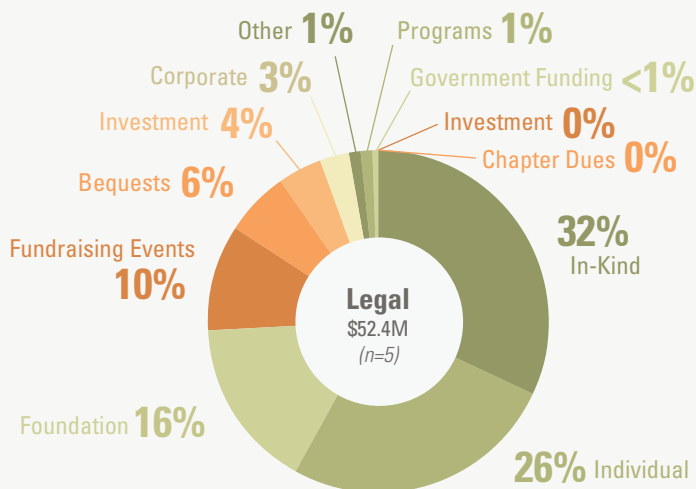
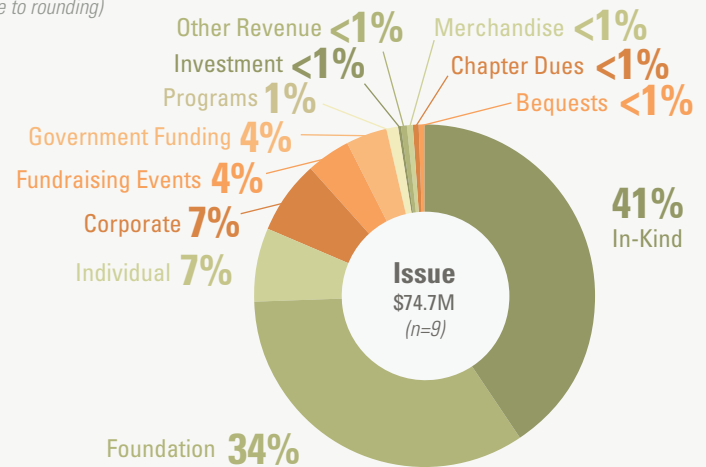
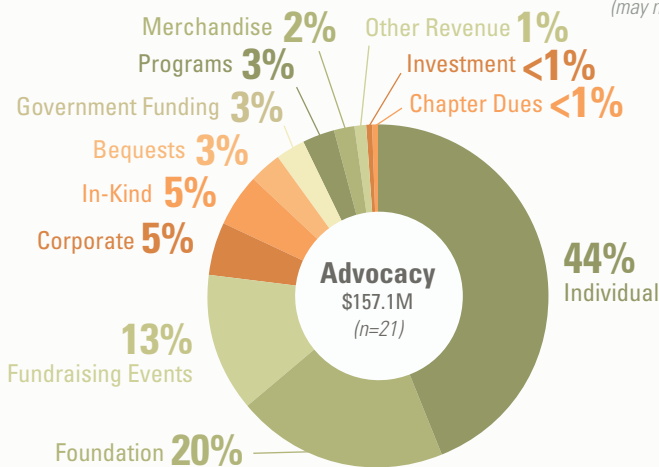
From 2018 to 2019, participating organizations reported an aggregate 1% increase in total combined revenue (including in-kind contributions), and a 3% increase in total revenue excluding in-kind. Excluding in-kind, issue organizations saw the greatest increase in revenue from 2018 to 2019, followed by legal organizations. Advocacy organizations saw nearly flat growth, while research and education organizations reported decreases in revenue.

38 PARTICIPANTS, TOTAL 2019 REVENUE = \$294.4M, TOTAL 2019 EXPENSES = \$283.9M

ORGANIZATIONS HAVE DIVERSE REVENUE STREAMS

2019 Revenue By Source

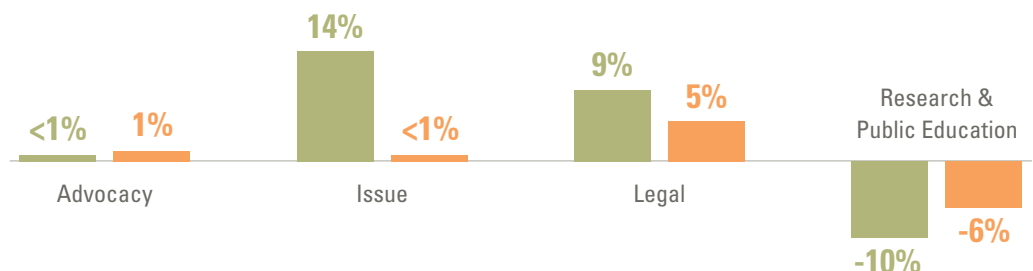
(may not sum to 100 due to rounding)



PERCENT CHANGE IN REVENUE FROM 2018 TO 2019

(n=39)

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



2020 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

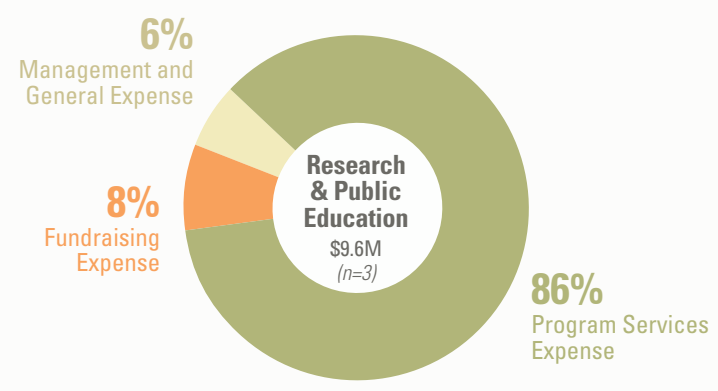
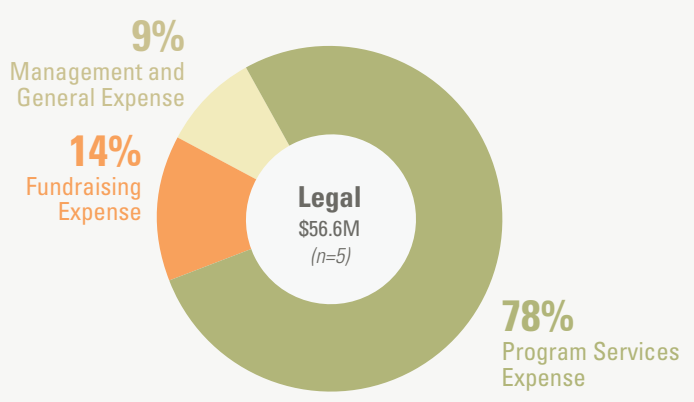
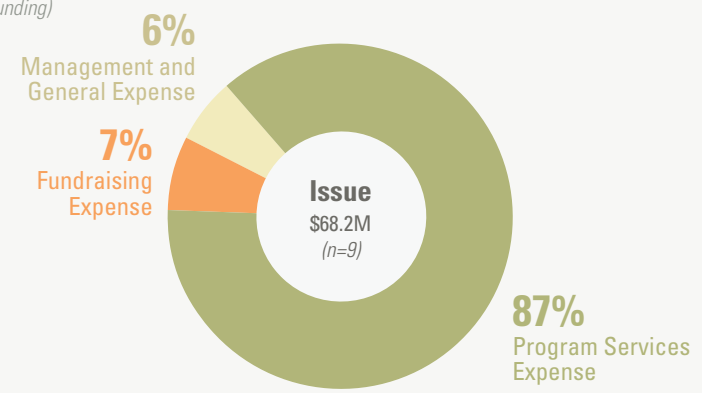
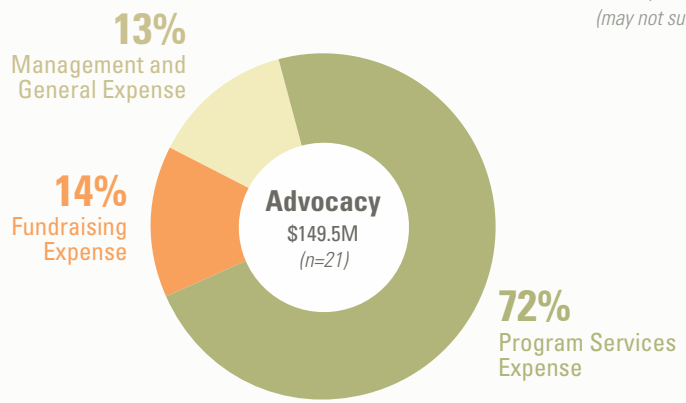
EXPENSES

In 2019, all organization types exceeded Better Business Bureau benchmarks for programmatic spending. As of mid-2020 (after the onset of the COVID-19 pandemic), organizations predicted a combined 1% increase in expenditures from 2019 to 2020. However, advocacy organizations are the only type to anticipate an increase, while issue, legal, and research organizations all project declines.

38 PARTICIPANTS, TOTAL 2019 REVENUE = \$294.4M, TOTAL 2019 EXPENSES = \$283.9M

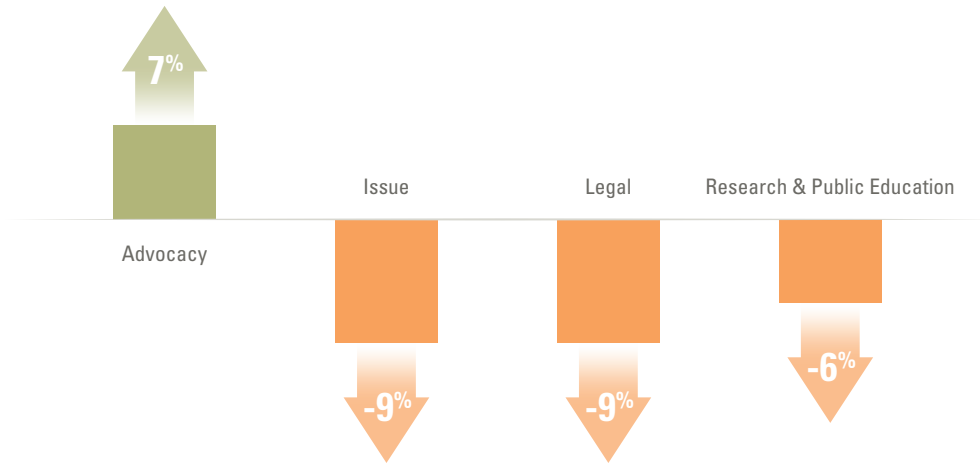
ORGANIZATIONS, REGARDLESS OF TYPE, MEET NONPROFIT STANDARDS FOR PROGRAM SPENDING

2019 Expenses By Expense Category
 (may not sum to 100 due to rounding)



AS OF MID-2020, ORGANIZATIONS PROJECT COMBINED 1% INCREASE IN EXPENSES, BUT PROJECTIONS VARY BY ORGANIZATION TYPES

% Change from 2019 Expenses (Excluding In-Kind Expenses) to Mid-2020 Projected Budgets



2020 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

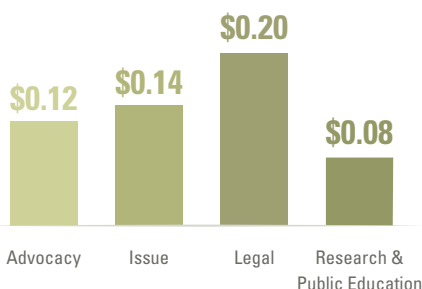


FUNDRAISING

The average fundraising cost to raise one dollar varies by organization type but remains generally efficient. New donors (defined as donors who have never before given to the organization) and the percent of revenue from top ten donors also varied by organization type. All organization types rely heavily on small donors (those giving between \$35 and \$999 in one year) and "microdonors" (less than \$35), though medium donors (\$1,000-\$24,999) and large donors (\$25,000+) also play a key role in all organizations' revenue. From 2018 to 2019, trends in giving by small, medium, and large donors varied by organization type.

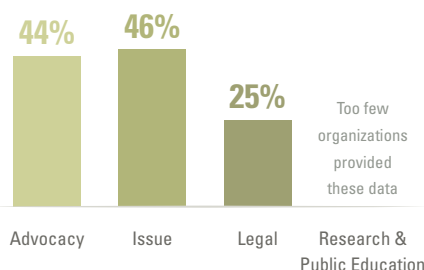
2019 AVERAGE FUNDRAISING EXPENSE TO RAISE \$1

(n=39)



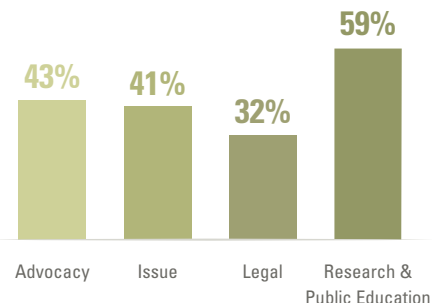
2019 PERCENT OF DONORS THAT ARE NEW DONORS

(n=30)



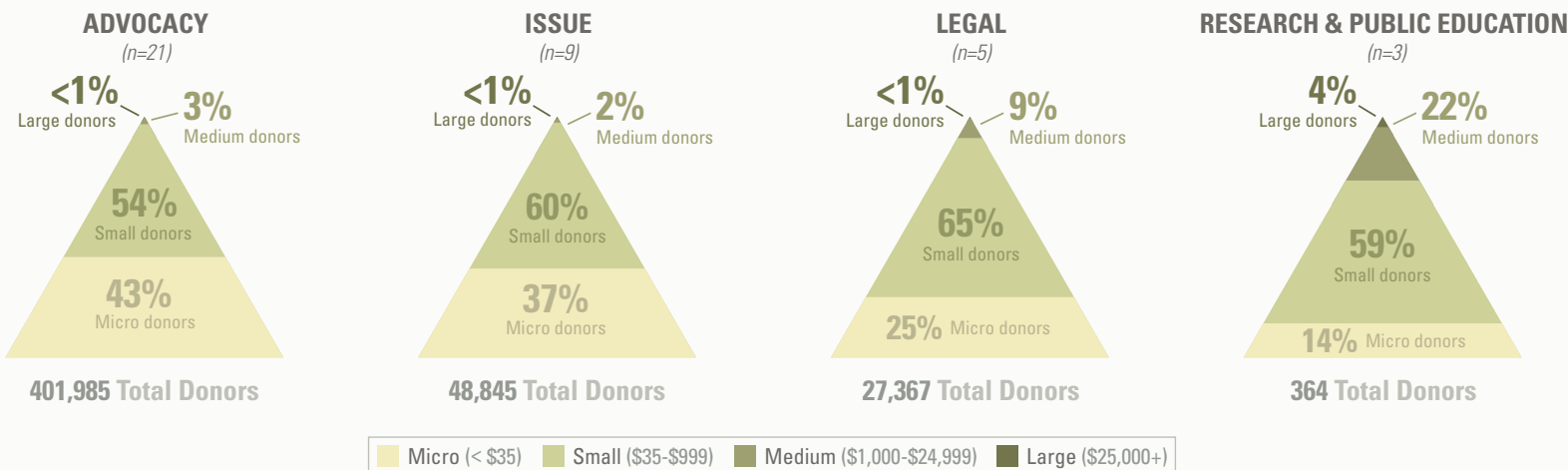
2019 PERCENT OF REVENUE FROM TOP TEN CONTRIBUTORS

(n=38)



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

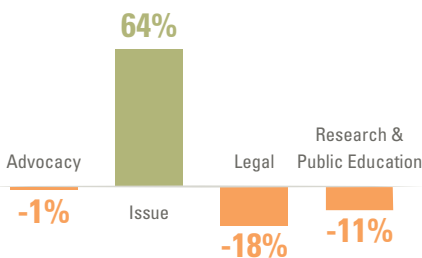
Number and Percent of Total Donors Giving At Various Levels in 2019



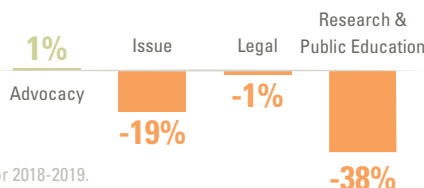
FROM 2018 TO 2019, RESEARCH ORGANIZATIONS SAW DECREASES IN NUMBER OF DONORS IN ALL SIZES OF GIVING; OTHER ORGANIZATION TYPES HAD MIXED EXPERIENCES

Change in Total Number of Donors from 2018 to 2019 (n=38)

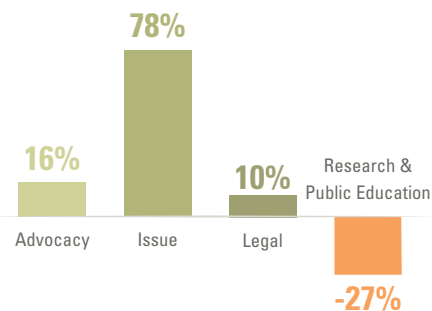
DONORS GIVING > \$35-\$999



DONORS GIVING > \$1,000 - \$24,999



DONORS GIVING > \$25,000+



Note: Trend data for "microdonors" (giving less than \$35) are not available for 2018-2019.

2020 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

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

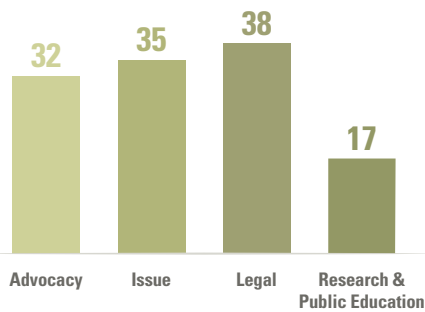


STAFF

Average staff size is roughly similar among all types except research organizations, which are roughly half the size of other types. Research organizations also report the highest share of staff who are part-time workers. Average compensation for senior staff varies widely across organization types.

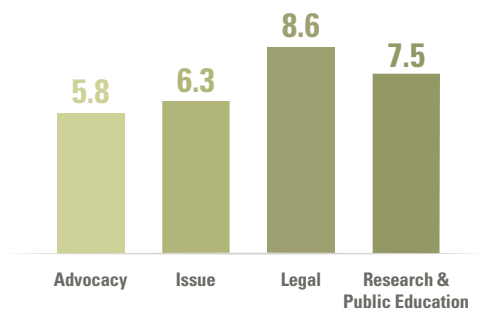
AVERAGE NUMBER OF STAFF IS HIGHEST FOR LEGAL ORGANIZATIONS

Average Number of Total Paid Staff (n=39)



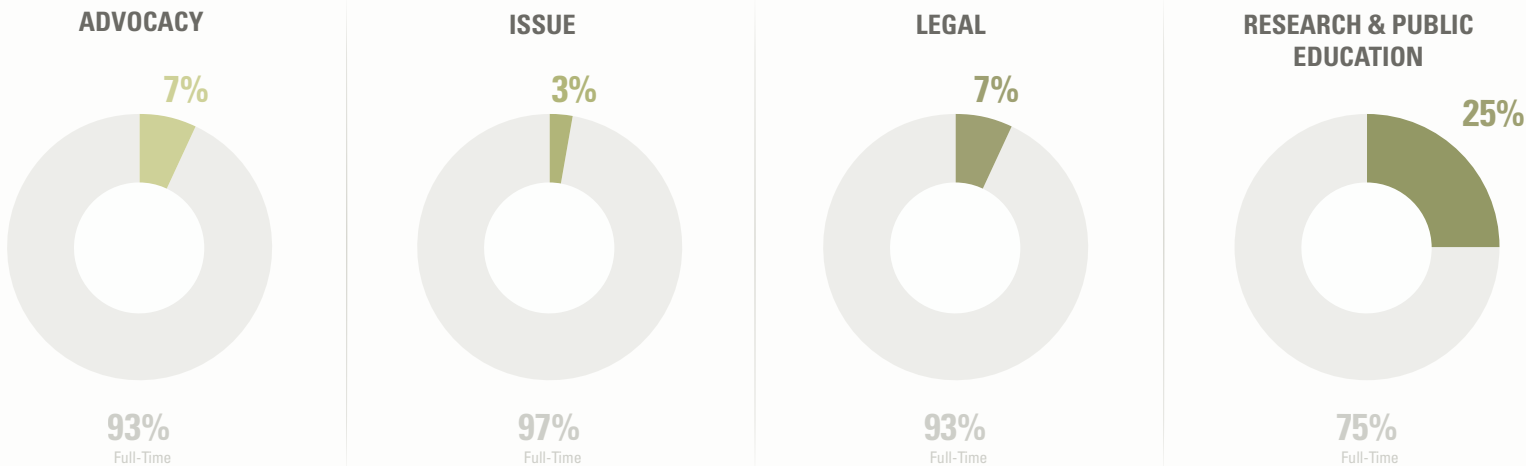
TENURE OF SENIOR MANAGEMENT IS LONGEST FOR RESEARCH & LEGAL ORGANIZATIONS

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



PERCENT OF STAFF THAT IS PART-TIME IS HIGHEST AT RESEARCH ORGANIZATIONS

% of All Staff That Is Part-Time (n=39)



SENIOR STAFF COMPENSATION VARIES ACROSS ORGANIZATION TYPES

Average Senior Staff Compensation (n=34)



2020 NATIONAL LGBTQI MOVEMENT REPORT

COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

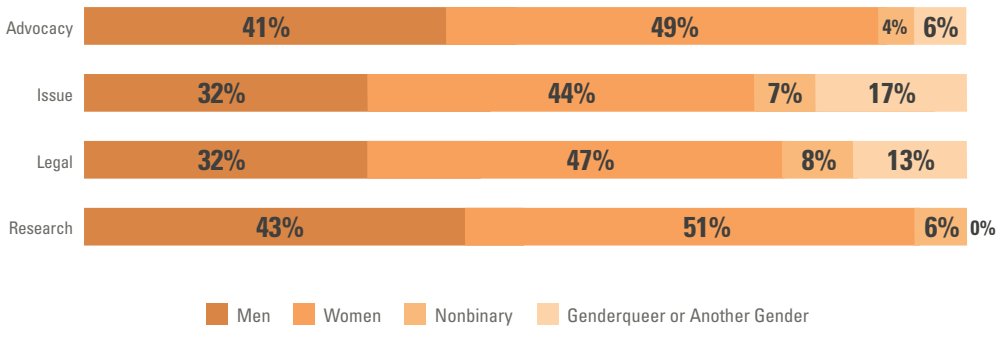


STAFF

Among organizations that provided staff demographic data, staff are demographically diverse across race, gender, sexual orientation, and age. Issue organizations reported the greatest racial and ethnic diversity and were the only organization type where the majority of all staff are people of color. Legal organizations reported the highest share of staff who are transgender (24%). Research organizations are the only type where the majority of all staff are women, and issue and legal organizations have the highest shares of staff who are nonbinary, genderqueer, or another gender identity. Note that in some cases percentages may not add to 100 due to rounding.

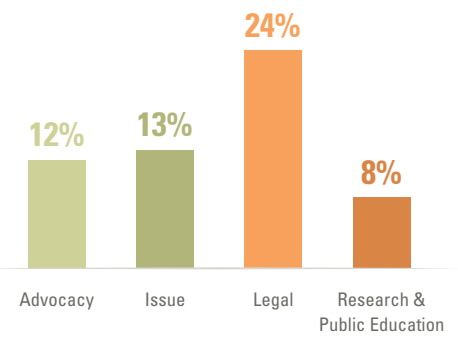
GENDER IDENTITY OF STAFF

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



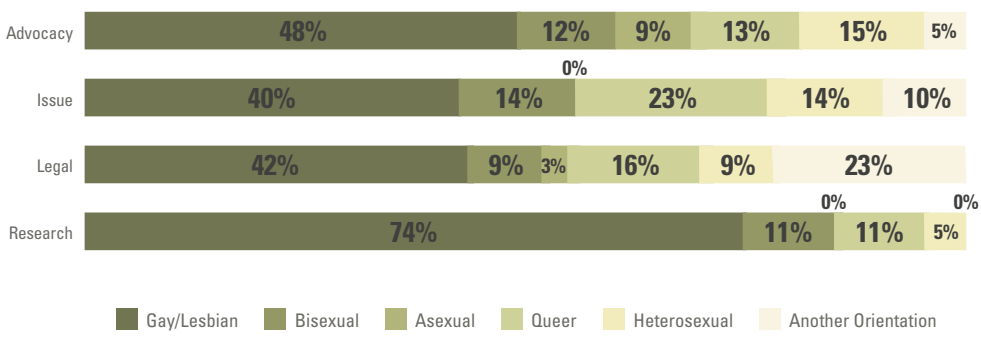
TRANSGENDER

% of Staff Identifying as Transgender (n=33)



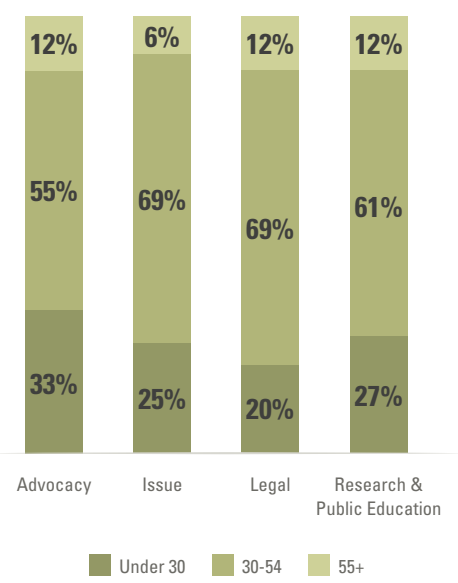
SEXUAL ORIENTATION OF STAFF

% of Staff Identifying as... (n=27)



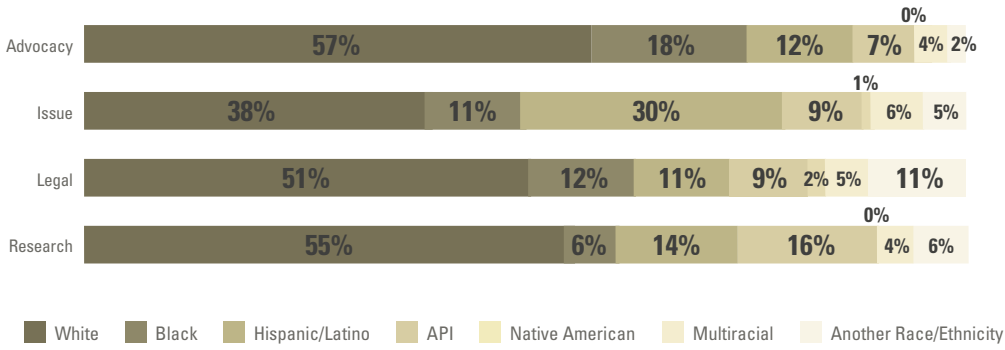
MAJORITIES OF STAFF ACROSS ORGANIZATION TYPES ARE AGES 30-54

% of All Staff in Each Age Range (n=39)



RACE/ETHNICITY OF STAFF

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



2020 NATIONAL LGBTQI MOVEMENT REPORT

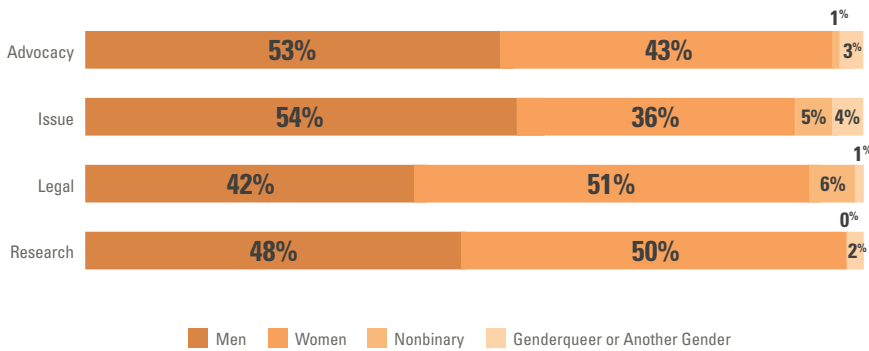
COMPARATIVE ANALYSIS BY ORGANIZATION TYPE

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

BOARDS

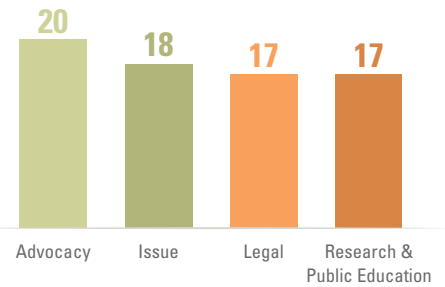
The boards of participating organizations are generally less diverse than staff. Legal organizations reported the highest share of board members who are people of color, as well as who are transgender. Average board sizes across organization types ranged from 17 to 20 members, and research and public education organizations had the highest board-to-staff ratio of any organization type.

GENDER IDENTITY OF BOARD (n=35)

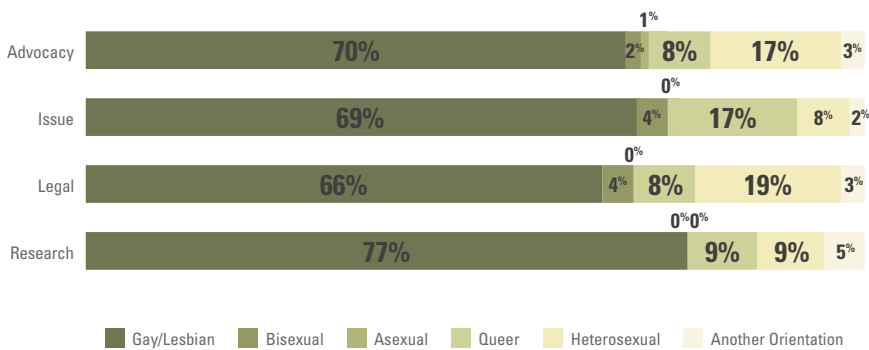


ORGANIZATIONS HAVE ROUGHLY THE SAME AVERAGE NUMBER OF BOARD MEMBERS

Average Number of Board Members (n=39)

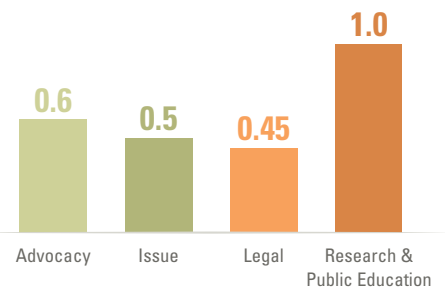


SEXUAL ORIENTATION OF BOARD (n=32)

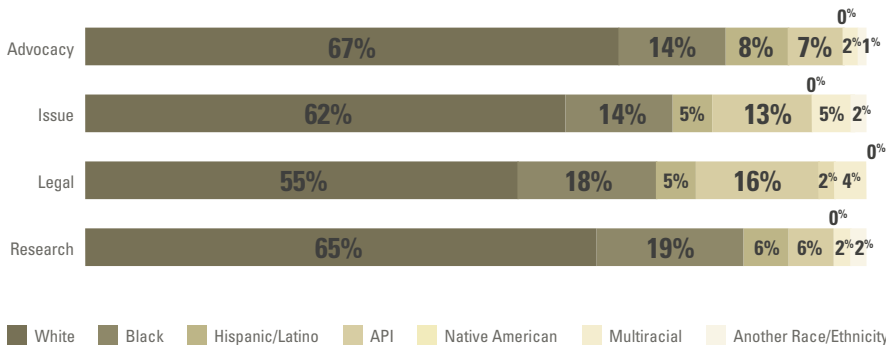


RESEARCH & PUBLIC EDUCATION ORGANIZATIONS HAVE HIGHEST BOARD:STAFF RATIO

(n=39)

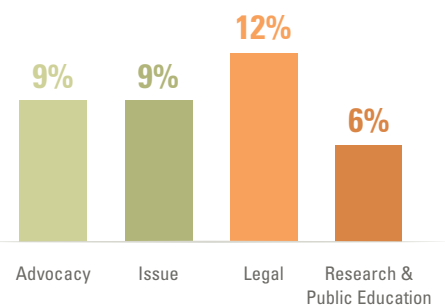


RACE/ETHNICITY OF BOARD (n=35)



TRANSGENDER BOARD MEMBERS

% of Board Identifying As Transgender (n=35)



COMPOSITE PROFILE: ADVOCACY ORGANIZATIONS

PARTICIPATING ADVOCACY ORGANIZATIONS

Organizations and Legal Structure (n=21)	C3	C4	PAC
(May not sum to 100 due to rounding)	(% of 2019 revenue)		
Basic Rights Oregon (BRO)	61%	37%	3%
Campaign for Southern Equality (CSE)	100%		
Equality California (EQCA)	40%	60%	
Equality Federation (EQ Fed)	95%	5%	
Equality Florida (EQFL)	87%	10%	2%
Equality North Carolina (EQNC)	80%	20%	
Family Equality (FEQ)	100%		
Freedom For All Americans (FFAA)	87%	13%	
Georgia Equality (GAEQ)	89%	11%	
GLAAD	100%		
Human Rights Campaign and Federation (HRC)	22%	78%	
interACT	100%		
Keshet	100%		
LGBTQ Victory Fund and Leadership Institute (VF/VI)	46.5%		53.5%
National Center for Transgender Equality (NCTE)	100%		
National Queer Asian Pacific Islander Alliance (NOAPIA)	100%		
PFLAG National	100%		
Services and Advocacy for GLBT Elders (SAGE)	100%		
Southerners on New Ground (SONG)	100%		
Task Force	99%	1%	
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.

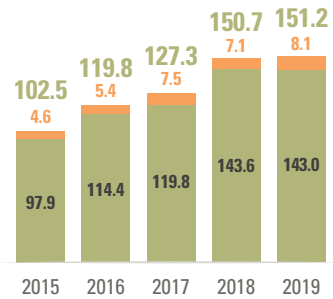


2019 performance on charity watchdog benchmarks: All advocacy organizations, except BRO, met BBB benchmarks for program spending in 2019.

REVENUE, EXPENSES & BUDGET

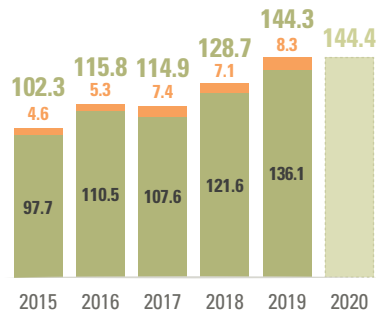
COMBINED REVENUE

\$ millions (n=17)



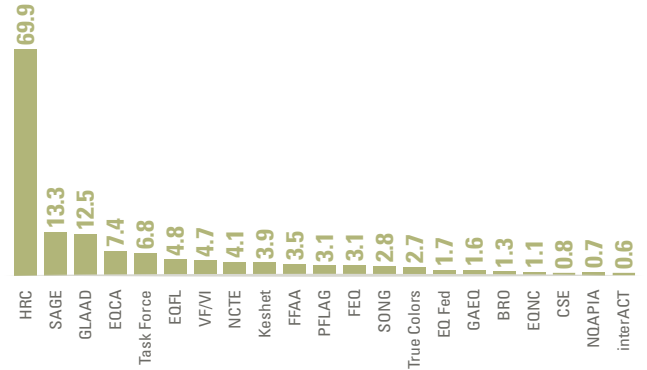
COMBINED EXPENSES

\$ millions (n=17)



MID-2020 BUDGET

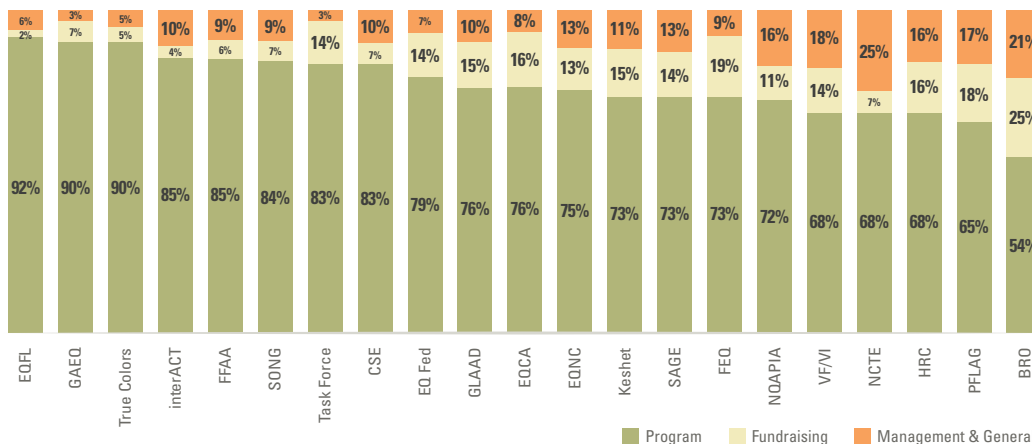
\$ millions, excluding in-kind expenses



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

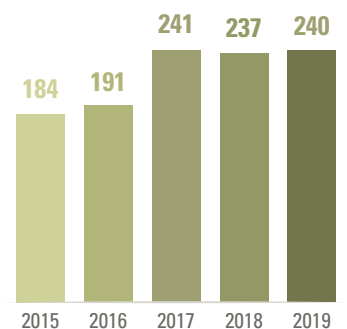
2019 EXPENSE BREAKDOWN

(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 2019 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	*		
Point Foundation	100%		
Reconciling Ministries Network (RMN)	100%		
Soulforce	100%		
The Trevor Project	100%		
True Colors	100%		

*Out & Equal is changing its fiscal year rotation and did not provide FY2019 data for some questions.

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.

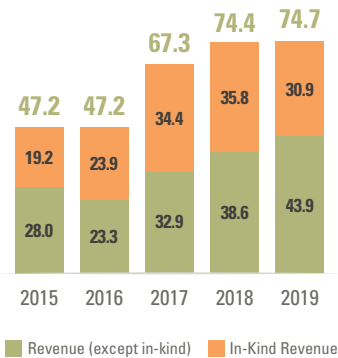


2019 performance on charity watchdog benchmarks: All issue organizations that provided these data, except RMN, met BBB benchmarks for program spending in 2019.

REVENUE, EXPENSES & BUDGET

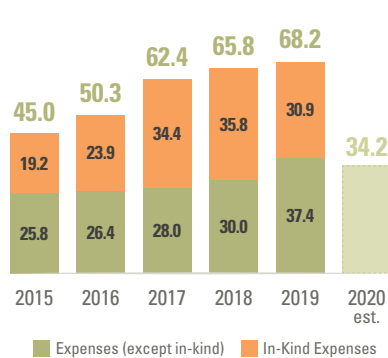
COMBINED REVENUE

\$ millions (n=9)



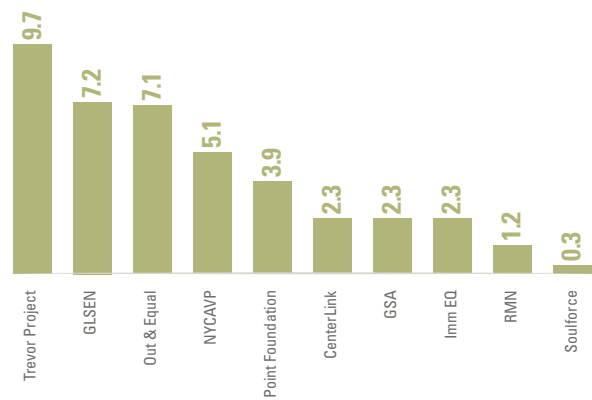
COMBINED EXPENSES

\$ millions (n=9)



MID-2020 BUDGET

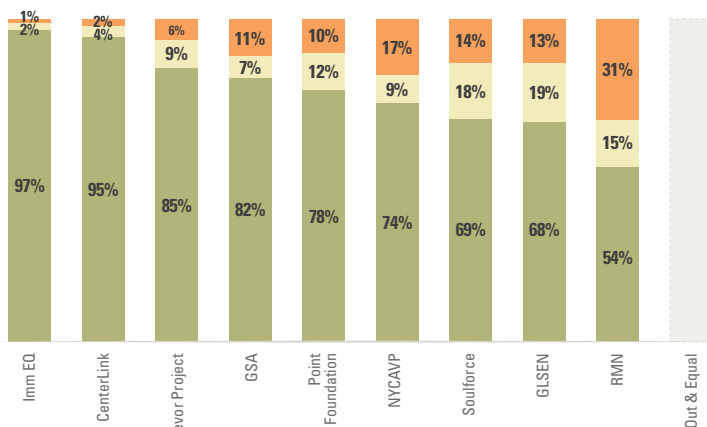
\$ millions, excluding in-kind expenses



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

2019 EXPENSE BREAKDOWN

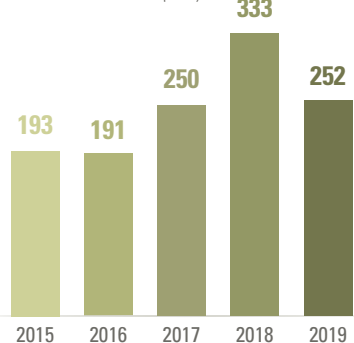
(may not sum to 100 due to rounding)



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 2019 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.

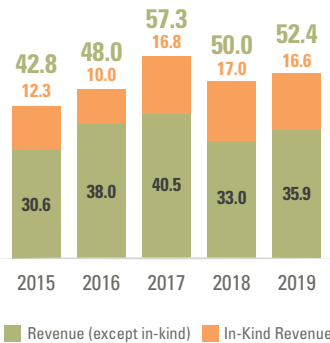


2019 performance on charity watchdog benchmarks: All legal organizations met AIP and BBB benchmarks in 2019.

REVENUE, EXPENSES & BUDGET

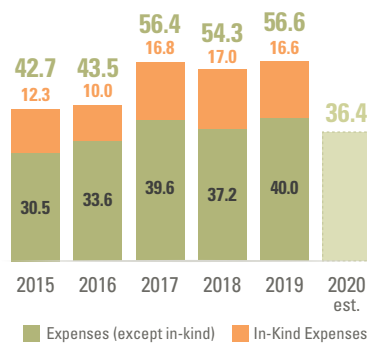
COMBINED REVENUE

\$ millions (n=5)



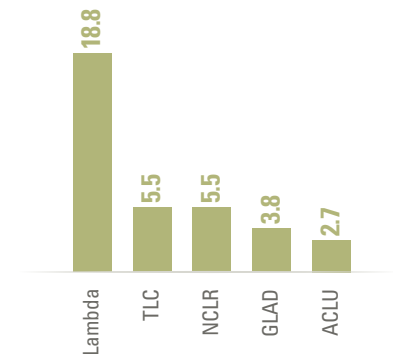
COMBINED EXPENSES

\$ millions (n=5)



MID-2020 BUDGET

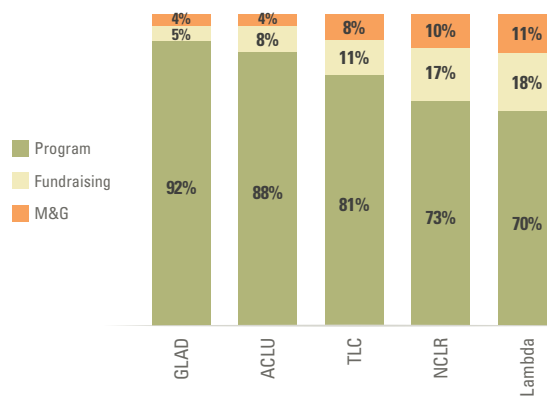
\$ millions, excluding in-kind expenses



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

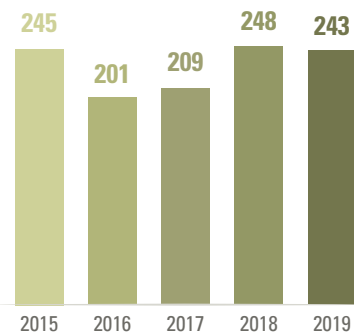
2019 EXPENSE BREAKDOWN

(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=3)	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.

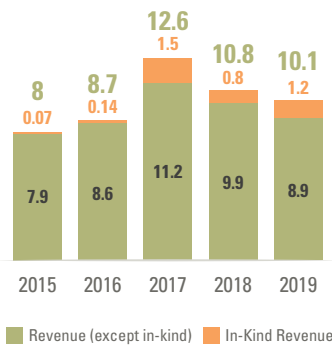


2019 performance on charity watchdog benchmarks: All research and public education organizations met AIP and BBB benchmarks in 2019.

REVENUE, EXPENSES & BUDGET

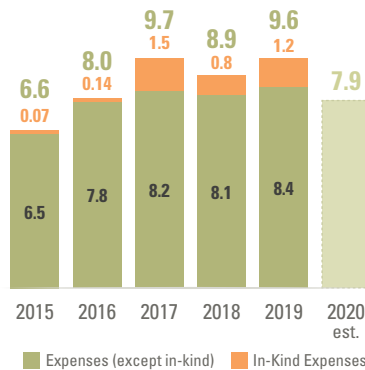
COMBINED REVENUE

\$ millions (n=3)



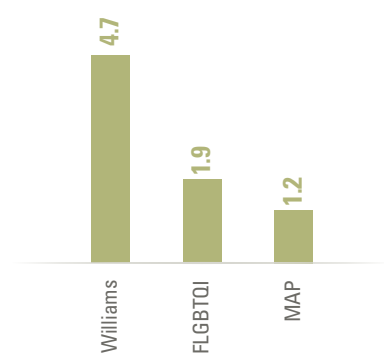
COMBINED EXPENSES

\$ millions (n=3)



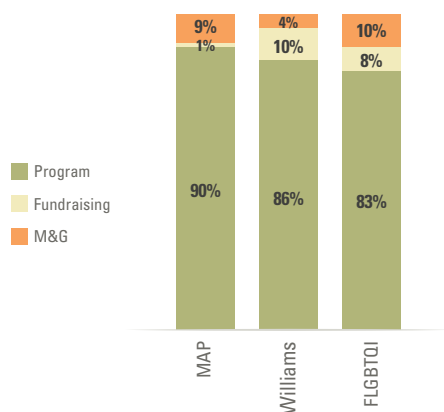
MID-2020 BUDGET

\$ millions, excluding in-kind expenses



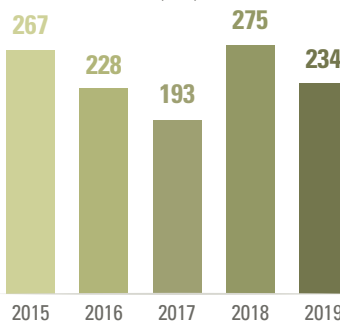
Note: Only organizations that provided five years of data are included.

2019 EXPENSE BREAKDOWN



AVERAGE DAYS OF WORKING CAPITAL FOR ORGANIZATIONS

(n=3)



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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