

2020 NATIONAL LGBTQI MOVEMENT REPORT

**A FINANCIAL OVERVIEW 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

The *National LGBTQI Movement Report* (NMR) series provides a comprehensive, annual snapshot of the financial health of many of the largest lesbian, gay, bisexual, transgender, queer, and intersex (LGBTQI) social justice organizations in the United States. These organizations generally focus on either broad LGBTQI advocacy, issue-specific advocacy, legal advocacy, or research and public education about LGBTQI people and issues.

The *2020 National LGBTQI Movement Report* finds that, at the end of the 2019 fiscal year, participating organizations remain efficient, focused on providing important programs and services, and are supported by a diverse range of revenue sources. Organizations reported increases in support from individual giving, fundraising events, and corporate contributions, though they also reported decreases in foundation contributions, bequests, and government funding. Both staff and board are internally diverse with respect to race and ethnicity, gender, and sexual orientation.

This annual report shows key financial trends and benchmarks in these major areas:

- Revenue
- Expenses
- Financial Trends
- Indicators of Financial Health
- Fundraising
- Staff
- Boards

Note that because different organizations participate from year to year, readers should not compare findings in this year's report to those in previous years' reports. Instead, readers can find historical comparisons within this and each report, as participating organizations are asked to provide both current and past years' data whenever possible.

Importantly, this report focuses on fiscal year 2019 and does not detail the impact of the COVID-19 pandemic. However, in November 2020, MAP conducted a survey of leading LGBTQI organizations, many of whom were also NMR participants, regarding the initial financial impacts of COVID-19. Early key findings of that survey are detailed below.¹

Revenue: Continued Growth, Including in Top Revenue Sources

- Across 38 participating organizations, **combined 2019 revenue** totaled \$294.4 million, exceeding combined 2019 expenses (\$283.9 million) by roughly \$10.5 million.
- Including in-kind revenue, these organizations reported a combined 1% **revenue increase from 2018 to 2019**. Excluding in-kind revenue, organizations' revenue increased 3%.
- Organizations that provided five-year trend data reported an aggregate 44% **revenue increase from 2015 to 2019** (including in-kind).
- Individual donations remain the largest share of organizations' combined revenue, comprising 37% of total 2019 combined revenue.
- From 2018 to 2019, organizations reported a cumulative 14% increase in revenue from individual contributions and a 14% increase in fundraising event net income. However, in that same time span, organizations also reported a 21% decrease in revenue from foundations and an 18% decrease in revenue from bequests.

Expenses: Growth Over Past Five Years, Focused on Programs and Services

- Total **combined 2019 expenses** were \$283.9 million, and the majority of organizations' combined expenses (77%) were spent on programs and services.
- **From 2018 to 2019, expenses (including in-kind) increased 8%**. Excluding in-kind, participating organizations' expenses increased 13%.
- Organizations that provided five-year trend data reported an aggregate 42% **expense increase (including in-kind) from 2015 to 2019**—demonstrating a clear growth in programs and services.

¹ In January 2021, MAP will publish a separate, more detailed report on the findings of this November 2020 survey. See also MAP's September 2020 *Understanding the Impact of COVID-19 on the LGBTQI Movement*, based on smaller surveys done earlier in the year.

Indicators of Financial Health: Clear Growth and Strength

- **Daily cash expenditures increased** 13% from 2018 to 2019, to an average of \$17,700 in spending per day. This is a five-year high for participating organizations.
- Participating organizations reported an average of 243 days of **working capital** in 2019, a decline from the previous year, but an overall 21% increase over the past five years (2015 to 2019).

Fundraising: Growth in Large Donors, But Declines in Medium and Small Donors that Comprise the Majority of Individual Giving

- In 2019, participating organizations reported a combined total of over 478,000 **individual donors**, the vast majority of whom (97%) gave under \$1,000 in 2019.
- Among organizations that provided five-year trend data (2015 to 2019), the total number of **large donors** (\$25,000+ per year) increased by 39%. However, **medium donors** (\$1,000-\$24,999) decreased by 11%, and **small donors** (\$35-\$999) decreased by 3%. Trend data are not yet available for micro donors (<\$35), but participating organizations reported over 199,000 such donors in 2019 alone.
- Five-year trend data show that the number of **individuals that attend fundraising events** slightly fluctuates from year to year, with an overall 3% decrease from 2015 to 2019.
- Based on the number of donors to participating organizations (assuming that all donors are LGBT people and that there are no duplicates) and the total number of LGBT adults in the United States,² data reported by participating organizations suggest that only 4.2% of LGBT people—only about 1 in every 25 LGBT people—donated to these leading LGBTQI advocacy organizations in 2019. Of course, many non-LGBT people donate to these organizations, and some LGBT people likely donate to multiple organizations, so the true number of **LGBT people who donate to these important organizations** is likely even smaller.

Staff: Demographically Diverse in Race, Gender, Orientation, and Age

- Participating organizations employed a total of 1,259 paid staff, 93% of whom are full-time workers. The **average staff** size at participating organizations is 32 staff, and the median staff size is 19. Staff size ranges from a low of five to a high of 241.
- Organizations that reported staff demographics have **racially** diverse staff, with 47% of all staff and 46% of all senior staff being people of color.³ Among all staff, 15% are Black or African American, 14% are Hispanic or Latinx, 8% are Asian or Pacific Islander (API), 5% are multi-racial, 0.5% are Native American, and 4% identify as another race or ethnicity. Compared to the national population, this means that LGBTQI organizations employ more Black and API people, but employ fewer Hispanic/Latinx and Native American people.
- Among reporting organizations, 48% of all staff identify as women, 38% as men, 5% as nonbinary, and 8% as genderqueer or another **gender identity**. Looking just at senior staff, the share of men rises to 48%, and the share of nonbinary and genderqueer people declines to 6% total.
- Overall, 15% of staff and 14% of senior staff identify as **transgender**. Nationally, an estimated 0.6% of the adult population identifies as transgender.⁴
- Of organizations providing data on the **sexual orientation** of their staff, 88% of all staff and 90% of senior staff are LGBTQ+. Among all staff, 45% are gay or lesbian, 11% are bisexual, 16% are queer, 5% are asexual, 11% are another (non-heterosexual) orientation, and 12% are heterosexual.
- The majority (59%) of all staff are **ages** 30 to 54, followed by 29% of staff under the age of 30, and 11% of staff who are 55 and older.

² Data on national LGBT population only refer to LGBT-identified adults, not queer or intersex adults. See The Williams Institute's (July 2020) *Adult LGBT Population in the United States*.

³ 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.

⁴ Andrew Flores, Jody Herman, Gary Gates, and Taylor Brown. 2016. *How Many Adults Identify as Transgender in the United States?* Los Angeles, CA: The Williams Institute.

Boards: Organization Boards Report Diverse Members, Though Less Diverse Than Staff

- Participating organizations reported a total of 736 board members, with an **average board size** of 19 members and a median of 15. The smallest board is comprised of five members, and the largest of 61.
- Boards are less **racially** diverse than staff, with only 35% of boards and 36% of executive boards being people of color. In particular, board members are much less likely than staff to be Hispanic/Latinx or Native American. Only 7% of board members and 5% of executive board members are Hispanic or Latinx (compared to 14% of staff), and only 0.3% of board members are Native American (compared to 0.5% of staff). There were zero Native American members identified among executive boards at organizations that reported these data.
- Among board members, 51% identify as men, 44% as women, 2% as nonbinary, and 3% as genderqueer or another **gender identity**.
- Overall, 9% of board members and 11% of executive board members identify as **transgender**.
- Of organizations providing data on the **sexual orientation** of their board members, 69% of board members are gay or lesbian, 3% are bisexual, 9% are queer, 1% are asexual, 3% are another (non-heterosexual) orientation, and 16% are heterosexual.

Initial Impacts of COVID-19: Smaller Budgets, But Adapting and Planning

- Among the 26 NMR organizations that also participated in a November 2020 COVID-19 survey, 58% **revised their 2020 budgets as a direct result of the pandemic**. Organizations that revised their budgets reported a 12% decrease in their combined budgets, or an average \$494,300 decrease per organization. Across all 26 organizations, this amounted to a 7% decrease in collective budgets.
- Nearly all (92%) organizations applied for **Paycheck Protection Program (PPP)** loans, totaling over \$14.1 million in support.
- The number of both **full-time and part-time positions** at these organizations decreased from January 2020 to October 2020. However, when asked about budgeted staff positions for January 2021, organizations report an expected return and even slight growth (compared to January 2020, pre-pandemic) in the number of full-time positions, but a 13% decrease in the number of part-time positions.
- Looking ahead to 2021, organizations report that their **top three expected risks related to the pandemic in 2021** are related to individual giving, foundation grant awards or renewals, and corporate support. Organizations also report that **key needed resources to help manage the impact of the pandemic** include fundraising strategies, technology tools, and impact data from peer organizations to help with planning and benchmarking.

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METHODOLOGY

The Movement Advancement Project (MAP) selected the 39 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 aggregated data across participating organizations, with most figures and charts showing data for all organizations combined. Not all organizations provided data for every question. Where figures or charts reflect data based on a subset of 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.

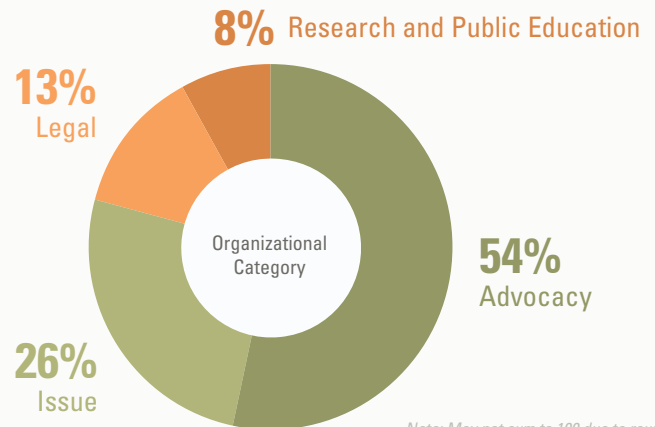
PARTICIPATING LGBTQI ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=39)

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 or policy analysis, or educate the public through media work.



Note: May not sum to 100 due to rounding

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, this report's 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.

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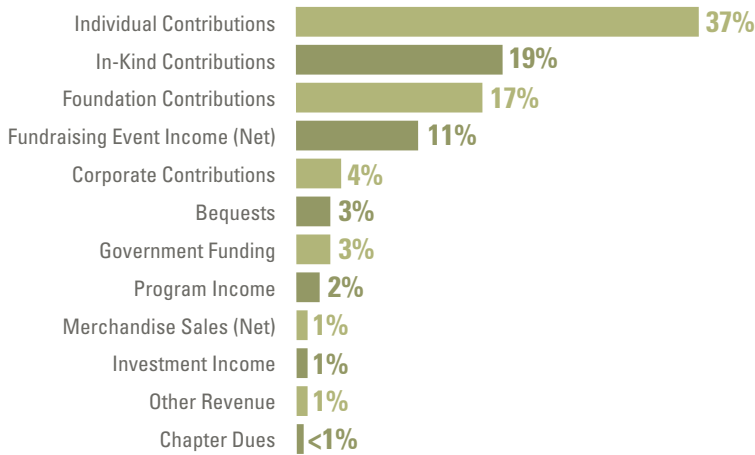
REVENUE AND EXPENSES

This section provides an overview of the revenue and expenses of leading organizations in the LGBTQI movement. For participating organizations, revenue and expenses increased from 2018 to 2019. Note: on this page, some analyses required data from previous years. Only organizations that provided data for all years in the relevant analysis are included. Note also that, where applicable, percentages may not sum to 100 due to rounding.

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

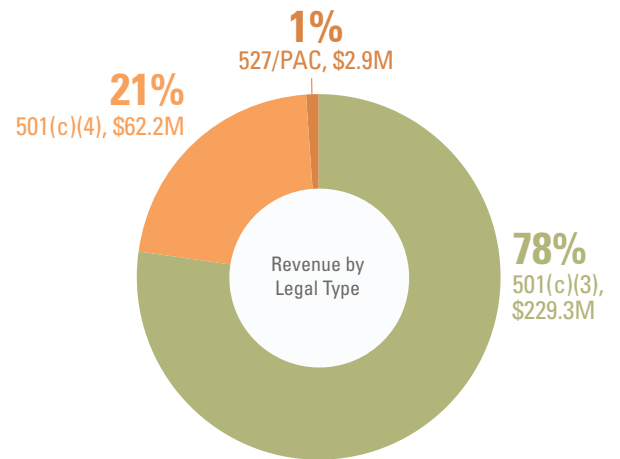
INDIVIDUAL CONTRIBUTIONS REMAIN TOP SOURCE OF REVENUE AMONG LGBTQI ORGANIZATIONS

2019 Revenue by Source (n=38)



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

2019 Revenue By Legal Type (n=38)



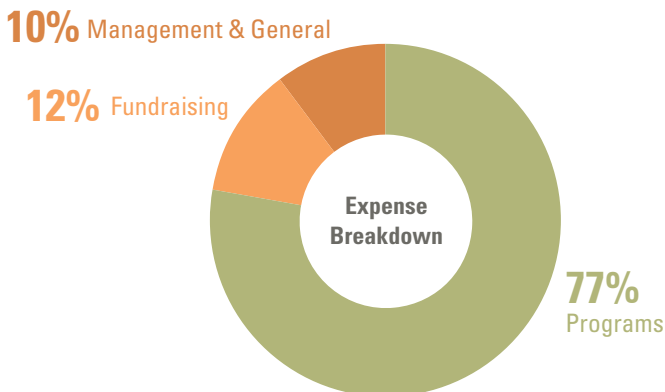
2018-2019 EXPENSES FOR PARTICIPATING ORGS \$ Millions (n=38)

EXPENSES	2018	2019	% CHANGE
Program Services Expense	\$206.6	\$219.6	+6%
Fundraising Expense	\$30.1	\$34.7	+15%
Management & General Expense	\$25.3	\$29.6	+17%
Total Expenses	\$262.0	\$283.9	+8%

* Note: Columns may not sum due to rounding.

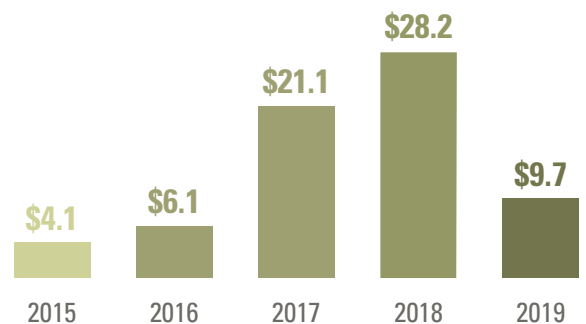
MAJORITY OF MOVEMENT EXPENSES (77%) SPENT ON PROGRAMS AND SERVICES

Combined 2019 Expenses (n=38)



2019 REVENUE EXCEEDED EXPENSES BY \$9.7 MILLION

Yearly Difference in Revenue and Expenses, 2015-2019, in Millions (n=34)



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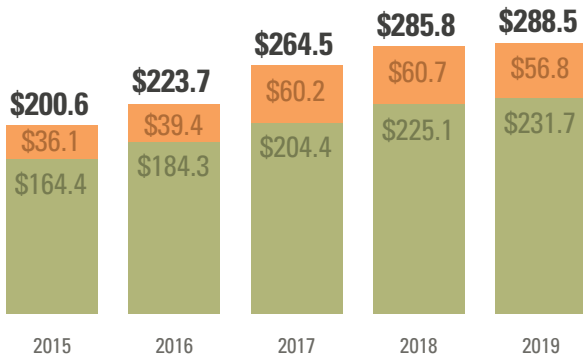
FINANCIAL TRENDS

This graphic examines the financial capacity of LGBTQI movement organizations from 2015 through 2019. At the end of the 2019 fiscal year, the participating organizations as a whole remain well-resourced, efficient, and supported by a diverse range of revenue sources. Note: on this page, some analyses require data from previous years. Therefore, only organizations that provided data for all years in the relevant analysis are included. Note also that, where applicable, numbers may not sum due to rounding.

34 PARTICIPANTS, TOTAL 2019 REVENUE = \$288.5M, TOTAL 2019 EXPENSES = \$278.7M

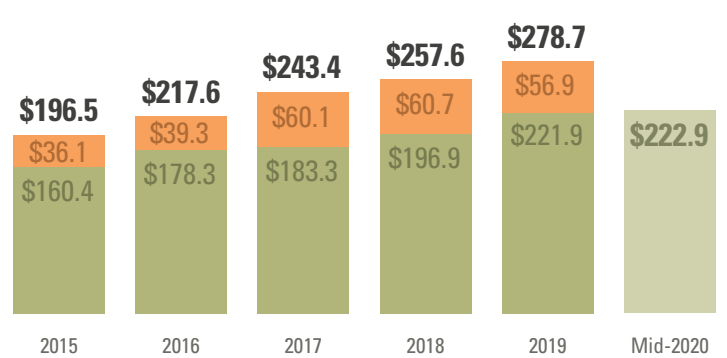
COMBINED REVENUE INCREASED 44% FROM 2015 TO 2019

2015-2019 Revenue by Source, in Millions (n=34)



COMBINED EXPENSES INCREASED 42% FROM 2015 TO 2019

2015-2019 Expenses by Source, in Millions (n=34)



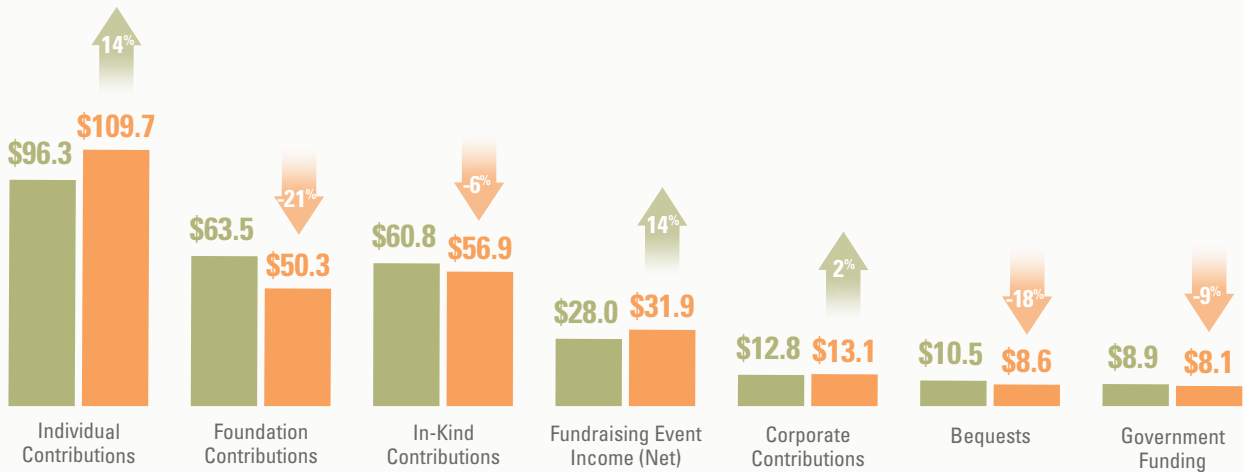
■ Minus In-Kind Expenses/Revenue ■ In-Kind Expenses/Revenue

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

2019 SAW SUBSTANTIAL INCREASES IN INDIVIDUAL DONOR AND FUNDRAISING EVENT INCOME

2018-2019 Revenue Change by Source in Millions (n=38)

■ 2018 ■ 2019



COMBINED REVENUE INCREASED 1% FROM 2018 TO 2019

2018-2019 Total Revenue Change in Millions (n=38)

■ 2018 ■ 2019



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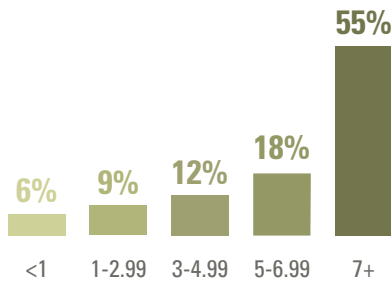


INDICATORS OF FINANCIAL HEALTH

This section examines several key indicators of financial health for leading organizations in the LGBTQI movement. Indicators of financial health measure the average financial stability of participating organizations, including days of working capital, liquidity ratio, and daily cash expense. Average days of working capital is the measure of an organization's cash reserves, shown as the average number of days an organization could meet all its expenses using only its current reserves. Liquidity ratio measures cash and investments on hand to cover current financial obligations such as accounts payable and lines of credit. Note: on this page, some analyses require data from previous years. Therefore, only organizations that provided data for all years in the relevant analysis are included. Note also that, where applicable, numbers may not sum due to rounding.

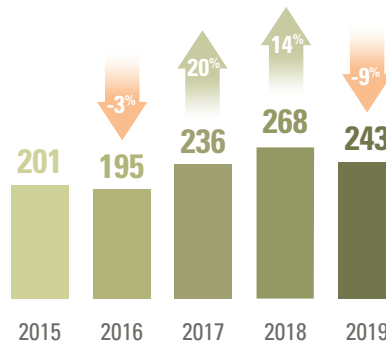
OVER HALF OF ORGANIZATIONS HAVE A 5-YEAR AVERAGE LIQUIDITY RATIO OVER 7

Percent of Organizations (n=33) by 2015-2019 Average Liquidity Ratio



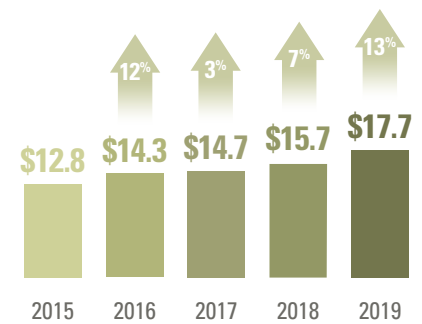
DAYS OF WORKING CAPITAL DECREASED 9% FROM 2018 TO 2019

2015-2019 Average Days of Working Capital (n=33)



DAILY CASH EXPENDITURES INCREASED 13% FROM 2018 TO 2019

2015-2019 Cumulative Average Daily Cash Expense, in Thousands (n=33)



2018-2019 STATEMENT FINANCIALS TREND DATA \$ MILLIONS (N=37)

	2018	2019	% INCREASE/DECREASE
Assets			
Cash and Cash Equivalents	55.9	63.4	13% ↑
Investments	69.2	70.9	3% ↑
Other Current Assets	38.4	39.2	2% ↑
Net Fixed Assets	33.5	33.8	1% ↑
Other Long-Term Assets	19.2	22.2	16% ↑
Total Assets	216.2	229.5	6% ↑
Liabilities			
Current Liabilities	19.3	19.3	0%
Long-Term Debt	8.8	8.2	-7% ↓
Other Long-Term Liabilities	3.6	4.4	22% ↑
Total Liabilities	31.7	31.8	+<1% ↑
Net Assets			
Without Donor Restrictions	101.4	118.5	17% ↑
With Donor Restrictions	56.2	51.2	-9% ↓
With Permanent Donor Restrictions	26.9	28.0	4% ↑
Total Net Assets	184.5	197.7	7% ↑
Total Liabilities and Net Assets	216.2	229.5	6% ↑

*Note: Columns may not sum due to rounding.

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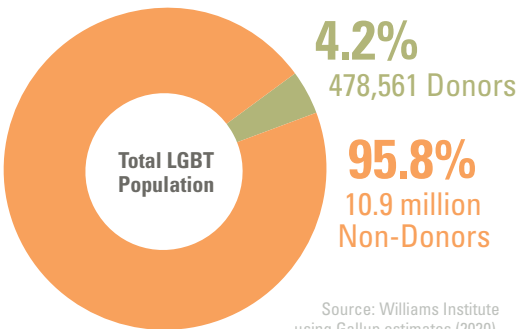
FUNDRAISING AND FUNDRAISING EFFICIENCY

Like most other nonprofits, participating organizations rely on fundraising to generate a significant portion of their revenue. This section includes analysis of top contributor trends, fundraising costs, fundraising from individual donors, and more. Overall, the data show a mixed trend for participating organizations when it comes to fundraising, as organizations saw increases in the number of large donors, but decreases in other donors. Note: on this page, some analyses require data from the previous five years. Therefore, only organizations that provided data for all five years are included.

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

4.2% OF LGBTQ POPULATION CONTRIBUTES TO PARTICIPATING ORGANIZATIONS

Combined Donors Giving Any Amount vs. Total Adult LGBTQ Population (n=38)

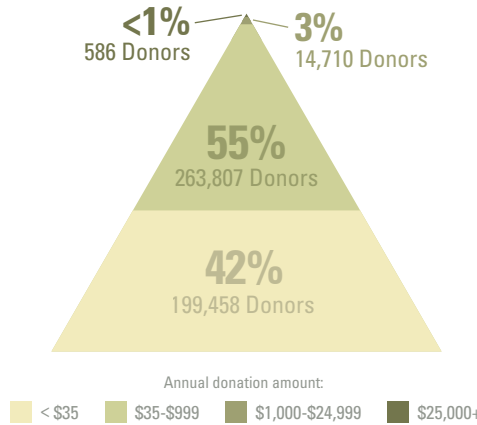


Source: Williams Institute using Gallup estimates (2020).

Note: Assumes all donors are LGBTQ. Likely percent of LGBTQ non-donors even higher.

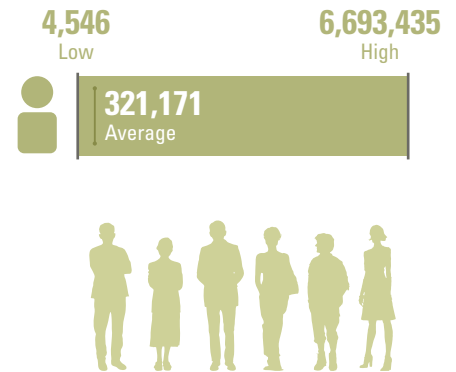
SMALL DONATIONS COMPRISE THE MAJORITY OF DONOR CONTRIBUTIONS

2019 Donor Pyramid (n=38)



CONTACTABLE NAMES VARY GREATLY

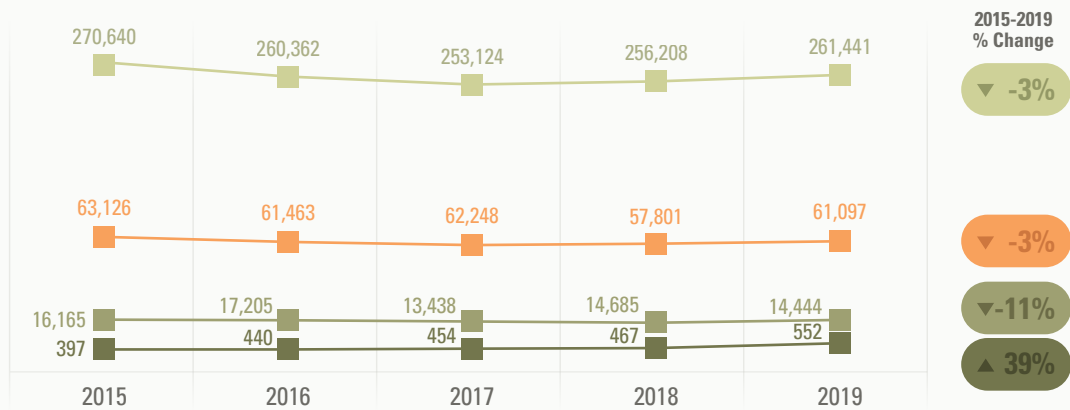
(n=35)



GROWTH IN LARGE DONORS, WHILE OTHER DONORS HAVE DECLINED

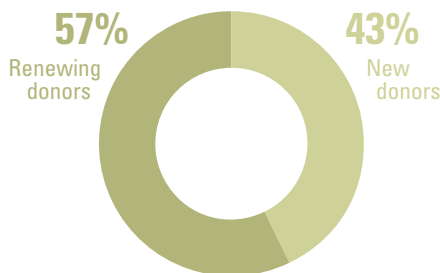
2015-2019 Number of Donors (n=33)

- Attended Fundraising Events
- Gave \$35-\$999
- Gave \$1,000-\$24,999
- Gave \$25,000+



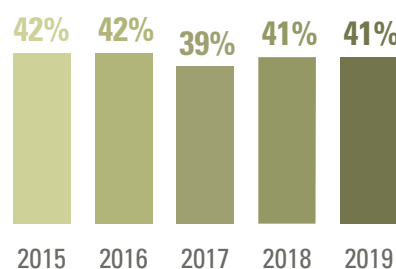
MORE THAN TWO IN FIVE DONORS ARE NEW DONORS

2019 Donors Combined (n=31)



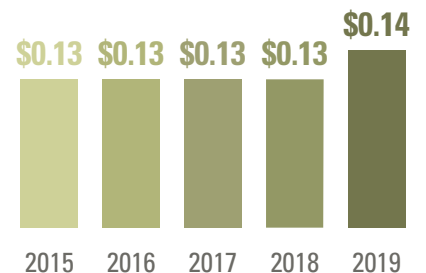
CONTRIBUTIONS FROM TOP 10 DONORS REMAIN STABLE OVER TIME

2015-2019 Percent of Revenue from Top Ten Contributors (n=34)



ORGANIZATIONS' FUNDRAISING EFFORTS REMAIN EFFICIENT OVER TIME

2015-2019 Overall Cost to Raise \$1 (n=34)



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STAFF AND BOARDS

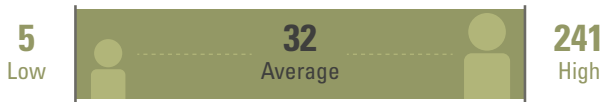
This section examines the staff and boards of participating organizations. Organizations were asked questions about their staff and board demographics, including gender identity, identification as transgender, sexual orientation, and race/ethnicity (with the option to choose more than one race/ethnicity for each employee and board member). Some organizations provided this information as well as data about staff age, tenure, and compensation.

ALL PARTICIPANTS (N=39): 1259 TOTAL STAFF (1174 FULL TIME; 85 PART TIME) & 736 BOARD MEMBERS

STAFF AND BOARD SIZE VARY

(n=39)

Staff



Board



FOR EVERY **10** BOARD MEMBERS, THERE ARE **17** STAFF MEMBERS



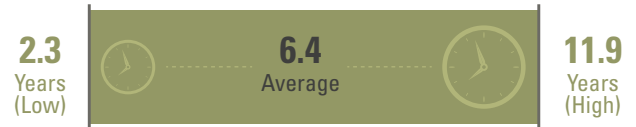
WIDE AVERAGE SALARY RANGE FOR SENIOR STAFF

Senior Staff Compensation (n=34)



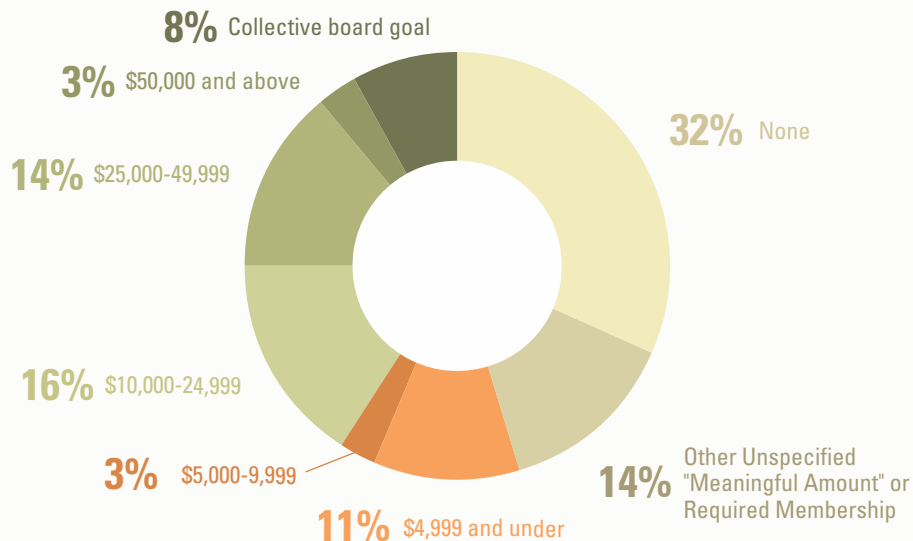
TENURE OF SENIOR STAFF VARIES GREATLY

Senior Staff Tenure (n=34)



MOST BOARD MEMBERS ARE REQUIRED TO DONATE OR SOLICIT CONTRIBUTIONS, BUT POLICIES VARY

Board Give/Get Policies (n=37)



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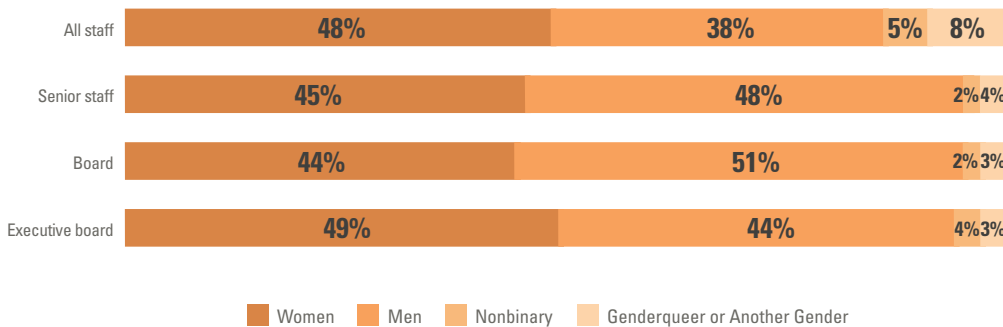


STAFF AND BOARDS

This section examines the staff and boards of participating organizations. Organizations were asked questions about their staff and board demographics, including gender identity, identification as transgender, sexual orientation, and race/ethnicity (with the option to choose more than one race/ethnicity for each employee and board member). Some organizations provided this information as well as data about staff age, tenure, and compensation. Figures show data for combined staff or board across all organizations that provided data. Note that numbers may not sum to 100 due to rounding.

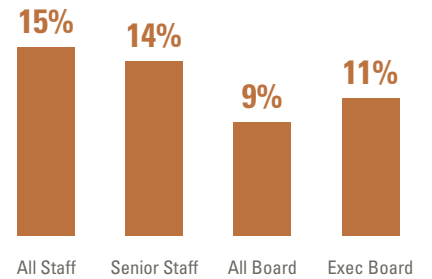
ALL PARTICIPANTS (N=39): 1259 TOTAL STAFF (1174 FULL TIME; 85 PART TIME) & 736 BOARD MEMBERS

GENDER IDENTITY OF STAFF AND BOARD

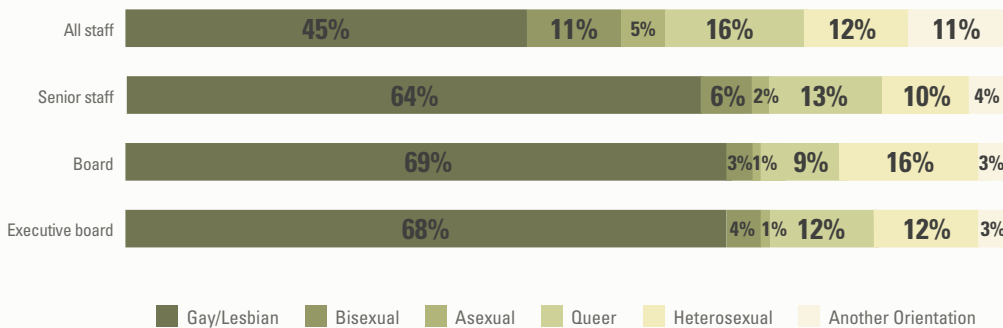


TRANSGENDER STATUS OF STAFF AND BOARD

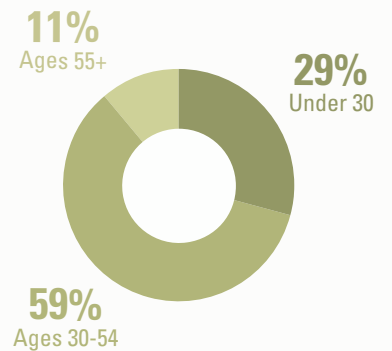
% of staff/board that is transgender



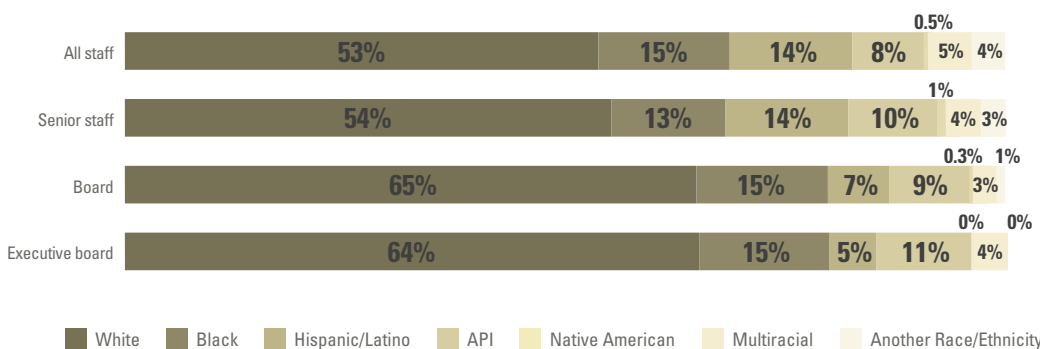
SEXUAL ORIENTATION OF STAFF AND BOARD



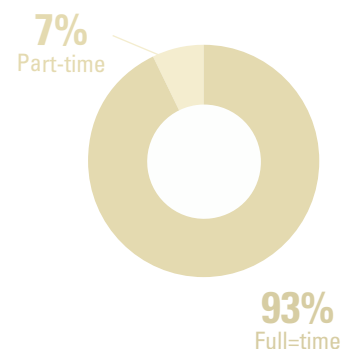
MAJORITY OF STAFF ARE AGES 30-54



RACE/ETHNICITY OF STAFF AND BOARD



ONE IN 14 STAFF ARE PART-TIME WORKERS



INITIAL IMPACT OF COVID-19



This report presents data from fiscal year 2019 for participating organizations, prior to the onset of COVID-19 in early 2020. In November 2020, MAP conducted a survey of leading LGBTQ and allied organizations regarding the ongoing impacts of COVID-19 on their operations. Twenty-six (26) participants also participated in this year's National Movement Report, and their responses are reported below. Not all organizations answered all questions.

IMPACTS ON COLLECTIVE BUDGET (N=26)



58% of organizations revised their 2020 budgets as a direct result of COVID

\$494,300 average budget decrease among organizations that revised due to COVID

ORIGINAL PRE-COVID EXPENSE BUDGET

(Jan 2020)

\$109.2 MILLION
(combined)

REVISED POST-COVID EXPENSE BUDGET

(Nov 2020)

\$101.8 MILLION
(combined)

-7%

collective decrease across all organizations

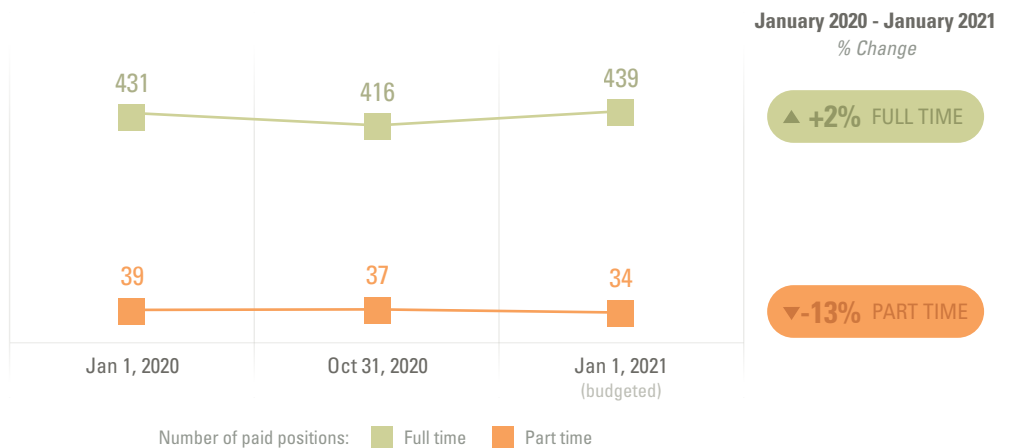
-12%

collective decrease across organizations that revised budgets due to COVID

IMPACTS ON STAFFING (N=19)

92%

of organizations (n=24) applied for Paycheck Protection Program (PPP) loans, totaling over **\$14.1 million**



LOOKING AHEAD TO 2021

KEY PANDEMIC-RELATED RISKS TO ORGANIZATION IN 2021

Top three risks identified by organizations (n=17)



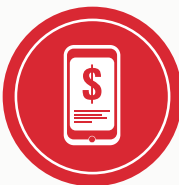
Individual giving



Foundation grant awards/renewals



Corporate support



Fundraising strategies



Impact data from other orgs to help with planning/benchmarking



Technology tools

KEY RESOURCES TO HELP MANAGE PANDEMIC IMPACTS

Top three resources identified by organizations (n=14)

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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