

2018 NATIONAL MOVEMENT REPORT

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



This report was authored by:

Movement Advancement Project

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

Contact Information

Movement Advancement Project

1905 15th Street #1097
Boulder, CO 80306
1-844-MAP-8800
www.lgbtmap.org

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KEY FINDINGS

The 2018 National LGBT Movement Report provides a comprehensive snapshot of the financial health of many of the United States' largest lesbian, gay, bisexual, and transgender (LGBT) social justice organizations. These organizations were categorized by MAP as focusing on broad LGBT advocacy, issue-specific advocacy, legal advocacy, or research and public education.

This year's edition analyzes the first full year under the Trump administration (Fiscal Year 2017), as well as budget projections for 2018. The report finds that, at the end of the 2017 fiscal year, the participating organizations remain efficient, focused on providing important programs and services, and are supported by a diverse range of revenue sources. Remarkably, cumulative in-kind contributions increased by 52%, with multiple organizations reporting that the bulk of these increases were due to donated legal services to support legal efforts to advance equality and counter the negative policies of the Trump presidency.

This annual report, now presented in infographic format, shows key financial trends and benchmarks in five major areas:

- Revenue
- Expenses
- Indicators of Financial Health
- Fundraising
- Staff and 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.

Revenue: The Largest Increase in the Past Five Years, Thanks to In-Kind and Individual Contributions

- The 40 participating organizations had a total combined 2017 revenue of \$269.7 million.
- Including in-kind revenue, these organizations reported an aggregate 13% revenue increase from 2016 to 2017. This is the largest year-to-year increase in the past five years. Excluding in-kind revenue, participating organizations' revenue increased 5% from 2016 to 2017.

- In-kind revenue alone increased by 52% from 2016 to 2017, largely reflecting a significant increase in donated legal services during the first full year under the Trump administration.
- 2017 revenue exceeded 2017 expenses by \$18 million.
- Revenue from individual donor contributions grew 14% from 2016 to 2017. Overall, these individual donations comprised the largest share (36%) of organizations' total revenue in 2017.
- Eleven organizations reported revenue declines over the past fiscal year. These organizations reported an average 25.6% decline in revenue in 2017 compared to 2016.
- Organizations that provided five-year trend data reported an aggregate 34% increase in revenue (including in-kind) from 2013 to 2017.

Expenses: The Largest Increase in the Past Five Years, Focused on Programs and Services

- Total 2017 expenses were \$250.2 million, and the majority of expenses (81%) are spent on programs and services.
- Expenses (including in-kind) increased 11% over the past year (2016 to 2017). This is the largest year-to-year increase in the past five years. Excluding in-kind, participating organizations' expenses increased 2% over the past year.
- In-kind expenses increased by 52% over the past year, reflecting the significant increase in donated legal services during the first full year of the Trump administration.
- Participating organizations project 2017 budgets will exceed 2016 spending by 16% (excluding in-kind expenses).
- Organizations that provided five-year trend data reported an aggregate 28% increase in expenses (including in-kind) from 2013 to 2017.

Improved Financial Health: Five-Year Highs Across Multiple Measures

- Participating organizations reported an average of 225 days of working capital in 2017, a 22% increase from 2016 and a five-year high for these organizations.
- From 2016 to 2017, daily cash expenditures increased 2% to an average of \$483,000 per day for the 35 organizations that reported this data. This is also a five-year high for these organizations.

More Donors Across the Board, But Especially Large Donors

- In 2017, participating organizations saw a 14% increase in the number of individual contributions from 2016.
- Individual donor contributions remain the most significant source of revenue among LGBT organizations, making up 36% of their total revenue.
- Over the last five years (2013-2017), large donors (\$25,000+) increased by 91%. Medium donors (\$1,000-\$24,999) increased by 12%, and small donors (\$35-\$999) increased by 3%.
- Over the last year (2016-2017), large donors increased by 43% and small donors increased by 15%. Medium donors, however, slightly decreased by 2.4%.
- The number of individuals who attended fundraising events remained relatively stable (increasing by 0.5%) from 2016 to 2017. However, the five-year trend shows that attendees at fundraising events increased by 19% from 2013 to 2017.
- Based on the number of donors to participating organizations (assuming that all donors are LGBT and there are no duplicates) and the total number of LGBT adults in the United States, data reported by participating organizations suggest that only 2.8% of LGBT people contributed \$35 or more in 2017 to participating organizations.

Staff Better Reflect Broader Population Diversity, While Boards Are Less Reflective

- Participating organizations employed a total of 964 full-time and 127 part-time staff.
- Organizations that reported staff demographics have diverse staff that reflect the overall population. Fifty-six percent of staff are white or Caucasian, while 15% identify as Black, 13% as Latinx, 8% Asian or Pacific Islander, less than 1% as Native American, 5% as multiracial, and 3% as some other race or ethnicity.
- Among senior staff and board members of LGBT organizations, roughly two-thirds are white (65% of senior staff, and 67% of board members).
- Slightly less than half of all staff identify as men (47%) and 46% identify as women, while 4% identify as non-binary and 3% as genderqueer or some other identity. One in ten (10%) staff identify as transgender. The majority (60%) of staff is between the ages of 30 and 54.
- Among board members, 51% identify as men, 45% as female, 2% as non-binary, and 2% as genderqueer or some other identity. Six percent of board members identify as transgender.
- Of organizations providing data on the sexual orientation of their staff, 54% of staff identified as gay or lesbian, 7% as bisexual, 16% as queer, 15% as another orientation, and 8% as heterosexual.
- Of organizations providing data on the sexual orientation of their board, 71% of board members identified as gay or lesbian (43% gay, 28% lesbian), 3% as bisexual, 10% as queer, 3% as another orientation, and 13% as heterosexual.

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METHODOLOGY

The Movement Advancement Project (MAP) selected the 40 participating organizations based on their size, importance to the overall LGBT movement, and collective coverage of LGBT issues and constituencies. Most participating organizations (32) have budgets over \$1 million; eight organizations have smaller budgets but are national leaders working in areas of critical concern to the LGBT movement.

MAP collected standardized financial and operations information from participating organizations and summarized key information across participants.

This report provides aggregated data across participating organizations, with most figures and charts showing data for all organizations combined. Where figures or charts reflect data based on a subset of participating organizations, this is noted.

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

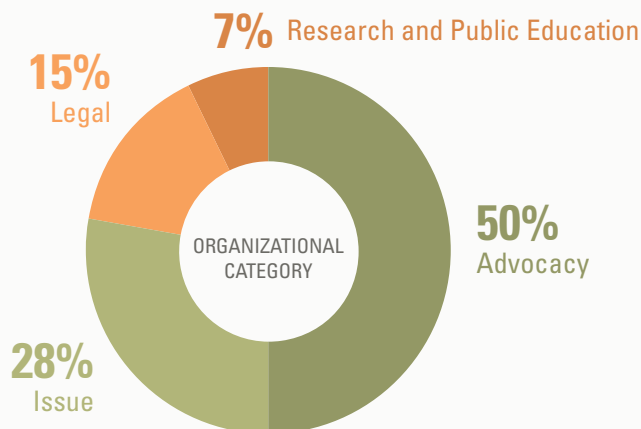
PARTICIPATING LGBT ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=40)

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

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

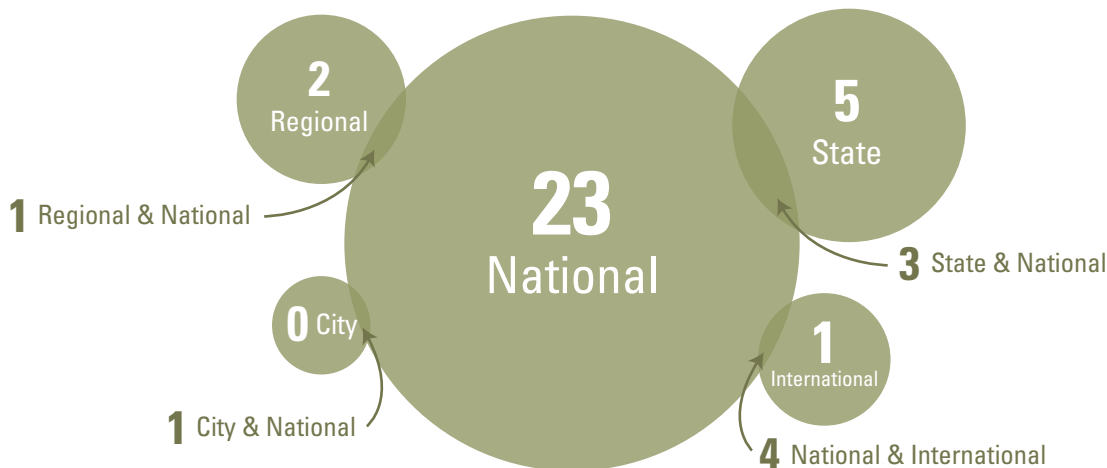
Legal organizations provide legal services to LGBT people and advocate and/or litigate within the legal system for LGBT people.

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



THE MAJORITY OF PARTICIPATING ORGANIZATIONS FOCUS ON NATIONAL LGBT ISSUES

Note: Many organizations noted more than one focus; options were not mutually exclusive.



NOTE: Participating organizations in this survey vary from year to year. Because of the change in participants, figures, charts, and numbers in the 2018 report 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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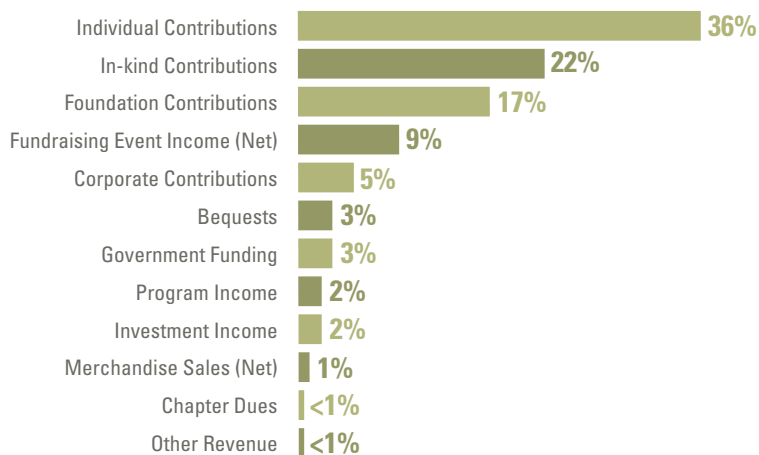
REVENUE AND EXPENSES

This section provides an overview of the revenue and expenses for 40 of the leading organizations in the LGBT movement. For participating organizations, revenue and expenses increased from 2016 to 2017. This report focuses on the aggregated revenue streams and expenses of participating organizations. Note: On this page, some analyses required data from the previous five years. Therefore, organizations founded after 2013 are not included in the longitudinal analyses.

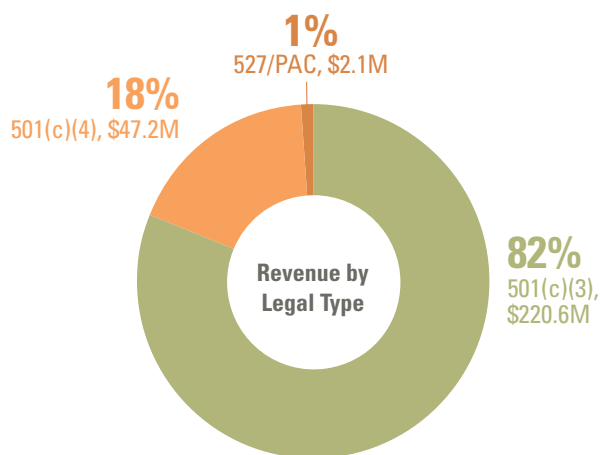
ALL PARTICIPANTS (N=40), TOTAL 2017 REVENUE = \$269.7 M, TOTAL 2017 EXPENSES = \$250.2 M

INDIVIDUAL CONTRIBUTIONS REMAIN TOP SOURCE OF REVENUE AMONG LGBT ORGANIZATIONS

2017 Revenue by Source



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



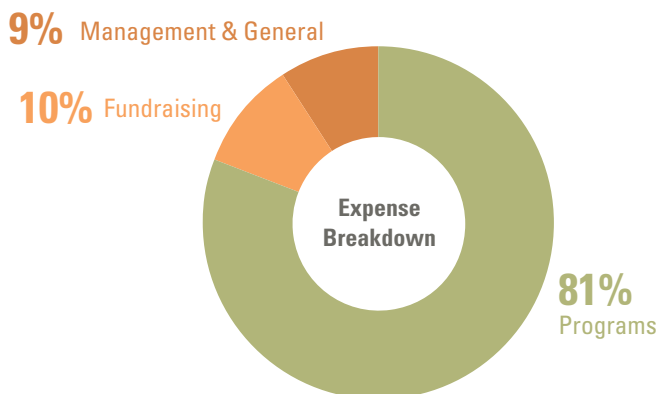
2016-2017 EXPENSES FOR PARTICIPATING ORGS \$ Millions

EXPENSES	2016	2017	% INCREASE/DECREASE
PROGRAM SERVICES EXPENSE	\$181.5	\$202.4	11%
FUNDRAISING EXPENSE	\$23.6	\$25.4	7%
MANAGEMENT & GENERAL EXPENSE	\$21.7	\$22.4	3%
TOTAL EXPENSES	\$226.8	\$250.2	10.3%

*Note: Columns may not sum due to rounding.

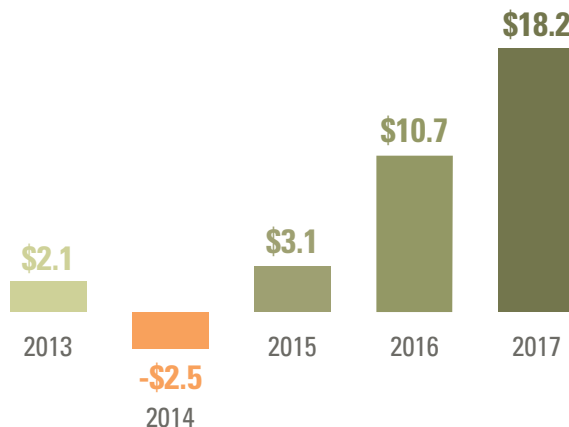
MAJORITY OF MOVEMENT EXPENSES (81%) SPENT ON PROGRAMS AND SERVICES

All Participants Combined, 100% = \$250.2 million



2017 REVENUE EXCEEDED EXPENSES BY \$18 MILLION

Yearly Difference in Revenue and Expenses, 2013-2017, in Millions (n=36)



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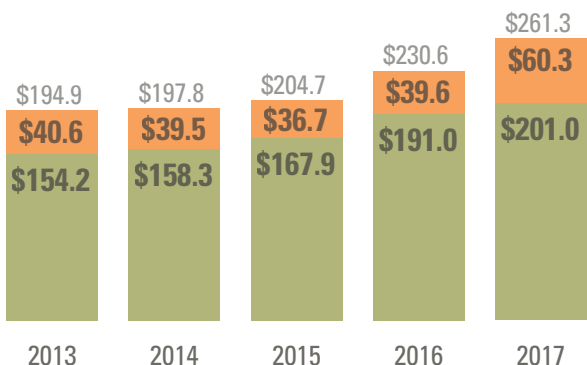
FINANCIAL TRENDS

This graphic examines the financial capacity of LGBT movement organizations from 2013 through 2017. At the end of the 2017 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 the previous five years. Therefore, organizations founded after 2013 are not included in the longitudinal analyses.

36 PARTICIPANTS, TOTAL 2017 REVENUE = \$261.3 M, TOTAL 2017 EXPENSES = \$243.1 M

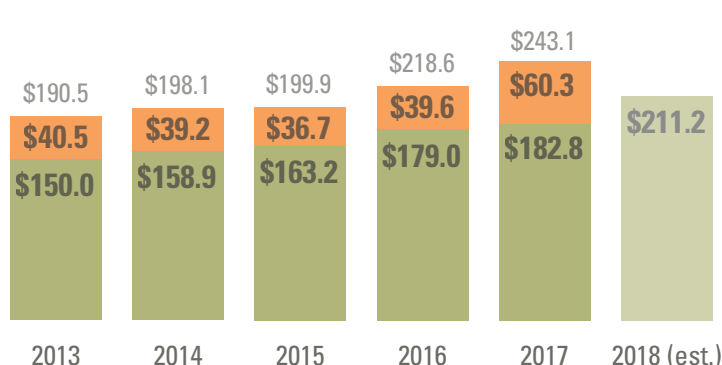
COMBINED REVENUE INCREASED 34% FROM 2013 TO 2017

2013-2017 Revenue by Source, in Millions



COMBINED EXPENSES INCREASED 28% FROM 2013 TO 2017

2013-2017 Expenses by Source, in Millions



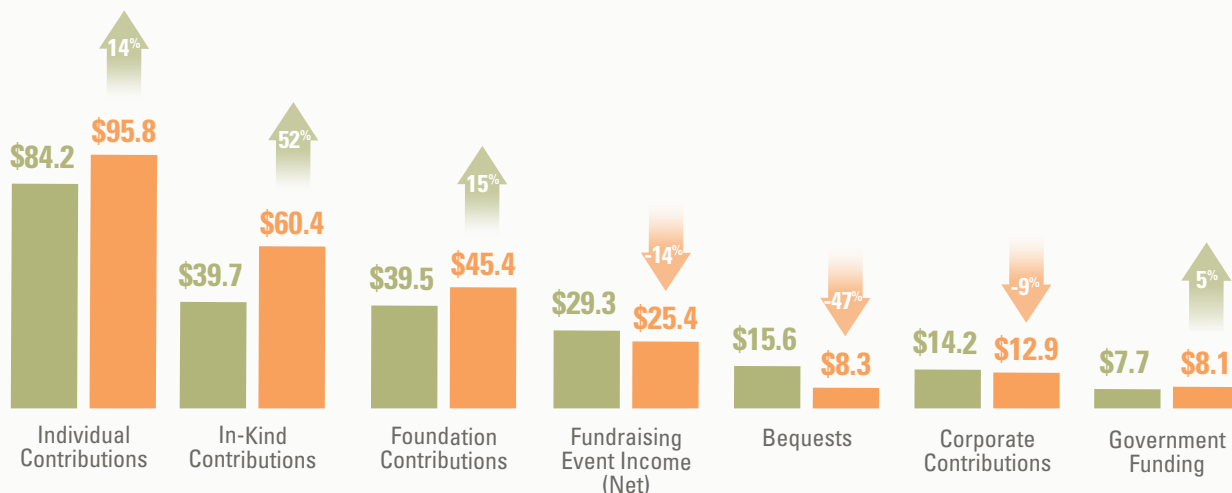
Legend: Minus In-Kind Expenses/Revenue (Green), In-Kind Expenses/Revenue (Orange)

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

2017 SAW INCREASES IN IN-KIND REVENUE, INDIVIDUAL CONTRIBUTIONS, AND FOUNDATION FUNDING

Revenue Change by Source from 2016 to 2017, in Millions

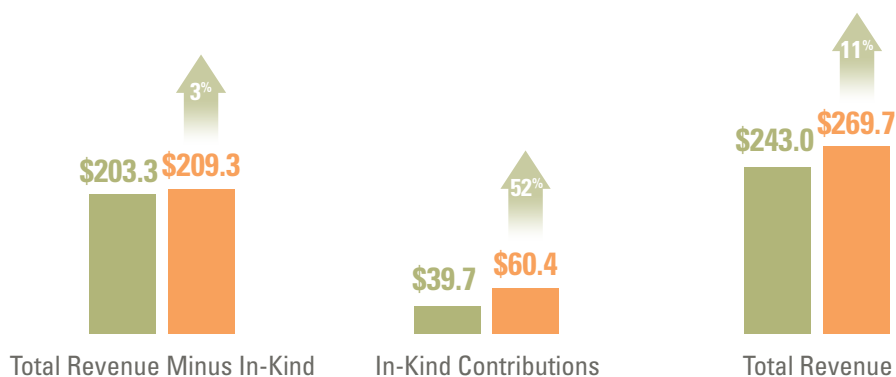
Legend: 2016 (Green), 2017 (Orange)



COMBINED REVENUE INCREASED 11% FROM 2016 TO 2017

Total Revenue Change from 2016 to 2017, in Millions

Legend: 2016 (Green), 2017 (Orange)



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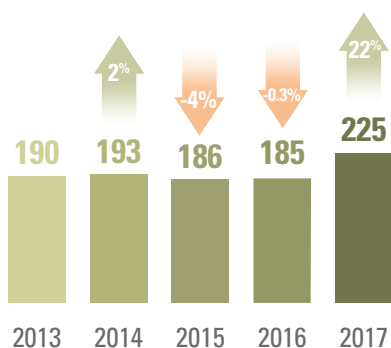
INDICATORS OF FINANCIAL HEALTH

This section examines several key indicators of financial health for leading organizations in the LGBT 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 in comparison to its average daily days could the organization meet all expenses using 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 the previous five years. Therefore, organizations founded after 2013 are not included in the longitudinal analyses.

35 PARTICIPATING ORGANIZATIONS

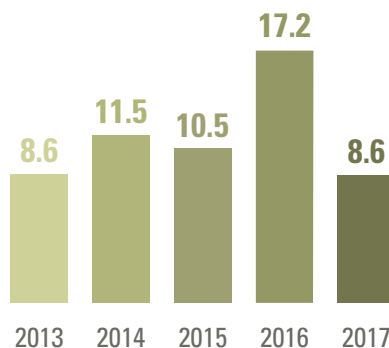
DAYS OF WORKING CAPITAL INCREASED 22% FROM 2016 TO 2017

2013-2017 Average Days of Working Capital



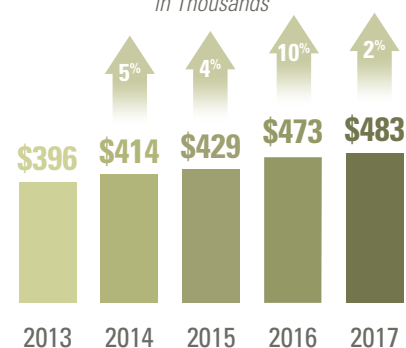
ORGANIZATIONS REPORT LOWER LIQUIDITY RATIO THAN IN RECENT YEARS

2013-2017 Average Liquidity Ratio



DAILY CASH EXPENDITURES INCREASED 2% FROM 2016 TO 2017

2013-2017 Cumulative Average Daily Cash Expense, in Thousands



39 PARTICIPATING ORGANIZATIONS

2016-2017 STATEMENT FINANCIALS TREND DATA \$ Millions

	2016	2017	% INCREASE/DECREASE
Assets			
Cash and Cash Equivalents	36.4	45.4	20% ↑
Investments	58.6	65.9	11% ↑
Other Current Assets	24.8	33.4	26% ↑
Net Fixed Assets	27.3	34.1	20% ↑
Other Long-Term Assets	9.8	7.9	-23% ↓
Total Assets	15.7	18.7	16% ↑
Liabilities			
Current Liabilities	15.6	17.5	12% ↑
Long-Term Debt	2.8	2.3	-18% ↓
Other Long-Term Liabilities	2.9	10.3	258% ↑
Total Liabilities	21.3	30.1	41% ↑
Net Assets			
Unrestricted	81.1	96.4	19% ↑
Temporarily Restricted	30.7	33.8	10% ↑
Permanently Restricted	23.8	26.5	11% ↑
Total Net Assets	135.6	156.7	16% ↑
Total Liabilities and Net Assets	156.9	186.8	19% ↑

*Note: Columns may not sum due to rounding.

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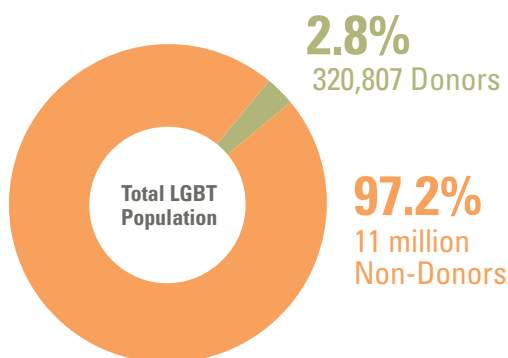
FUNDRAISING AND FUNDRAISING EFFICIENCY

Like most other nonprofits, participating organizations rely on fundraising to generate a significant portion of their revenue. This section examines the ways in which LGBT nonprofits fundraise and includes analysis of top contributor trends, fundraising costs, fundraising from individual donors, and comparisons with national trends. Overall, the data show a slight positive trend for participating organizations when it comes to fundraising, as organizations saw increases in the number of large donors. Note: On this page, some analyses require data from the previous five years. Therefore, organizations founded after 2013 are not included in the longitudinal analyses.

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

LESS THAN 3% OF LGBT POPULATION CONTRIBUTES TO PARTICIPATING ORGANIZATIONS

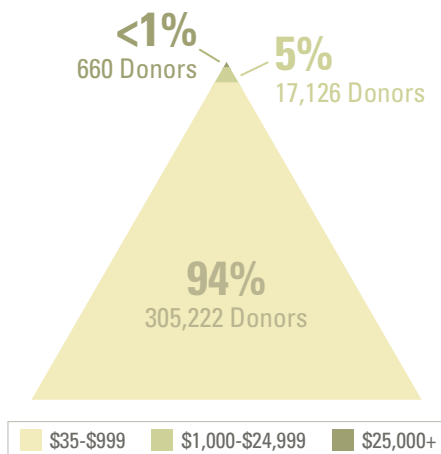
Combined Donors Giving ≥ \$35 vs. Total Adult LGBT Population



Source: Gallup (2017 LGBT population estimate)
Note: Assumes all donors are LGBT. Likely percent of LGBT non-donors even higher.

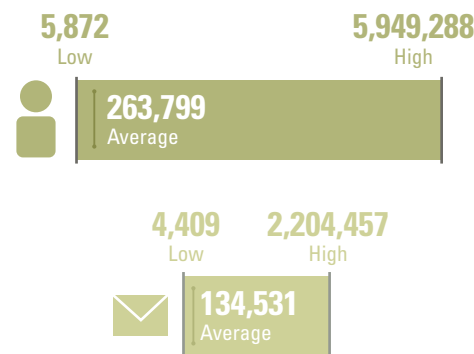
SMALL DONATIONS COMPRISE THE MAJORITY OF DONOR CONTRIBUTIONS

2017 Donor Pyramid (n=38)



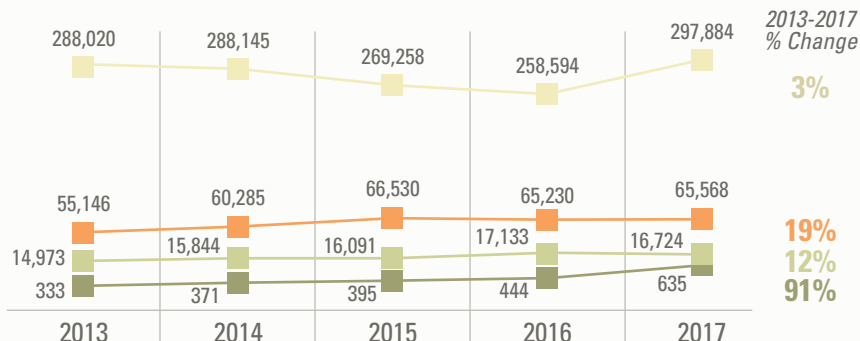
MAIL AND EMAIL CONTACTS VARY GREATLY

Contactable Names and Emails



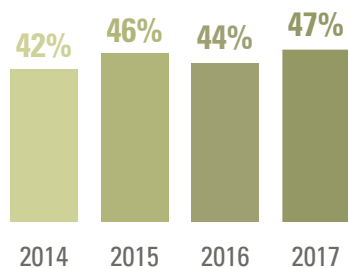
GROWTH IN LARGE & MEDIUM DONORS EXCEEDS GROWTH IN SMALL DONORS

2013-2017 Number of Donors (n=32)



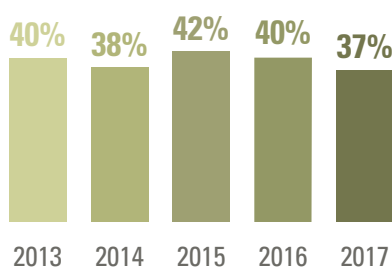
DONOR TURNOVER REMAINS STABLE OVER TIME

2014-2017 Donor Turnover



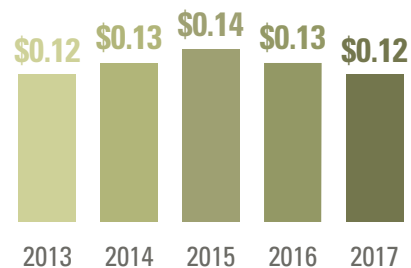
CONTRIBUTIONS FROM TOP 10 DONORS REMAIN STABLE OVER TIME

2013-2017 Percent of Revenue from Top Ten Contributors (n=33)



ORGANIZATIONS' FUNDRAISING EFFORTS REMAIN EFFICIENT OVER TIME

2013-2017 Overall Cost to Raise \$1 (n=33)



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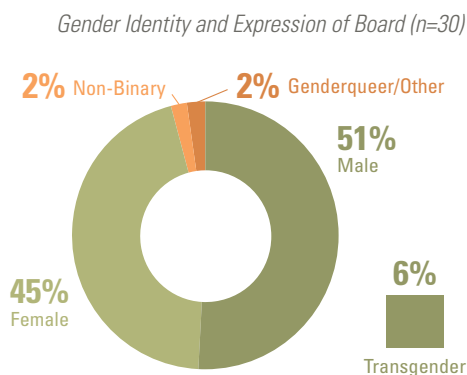
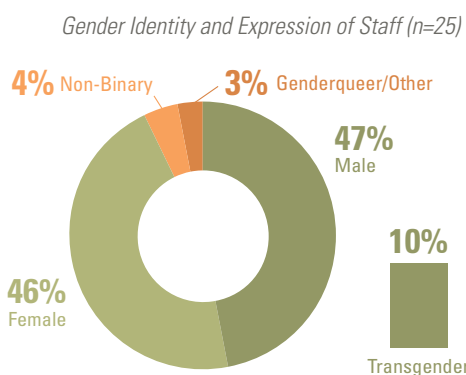


STAFF AND BOARDS

This section examines the staff and boards of participating organizations. In total, participating organizations have diverse staff totaling 964 full-time, 127 part-time employees, and 750 board members. Organizations were asked questions about their staff and board demographics, including gender identity and expression, 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: 964 FULL-TIME & 127 PART-TIME (N=39), 750 BOARD MEMBERS (N=38)

ORGANIZATIONS' STAFF & BOARDS HAVE GENDER DIVERSITY



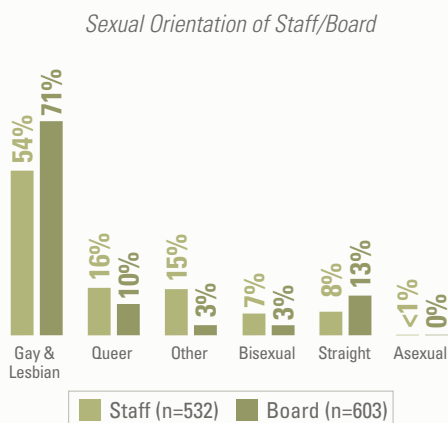
BROAD AVERAGE SALARY RANGE FOR SENIOR STAFF



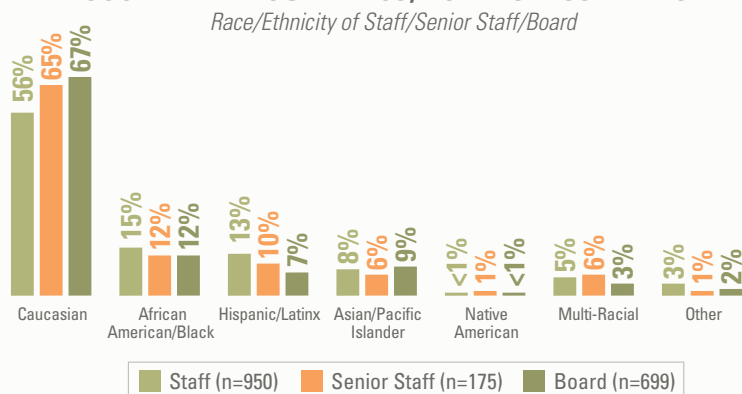
TENURE OF SENIOR STAFF VARIES GREATLY



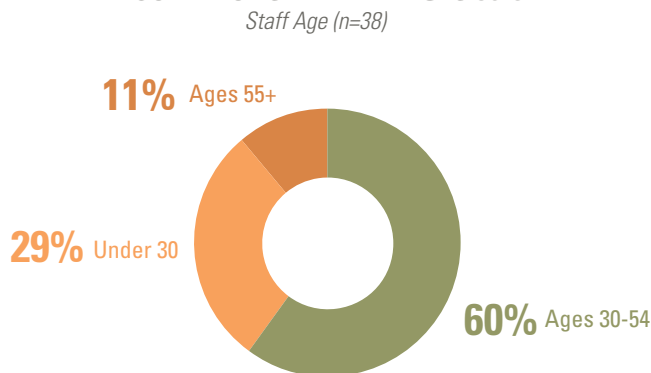
MAJORITY OF STAFF & BOARD IDENTIFY AS LGBTQ



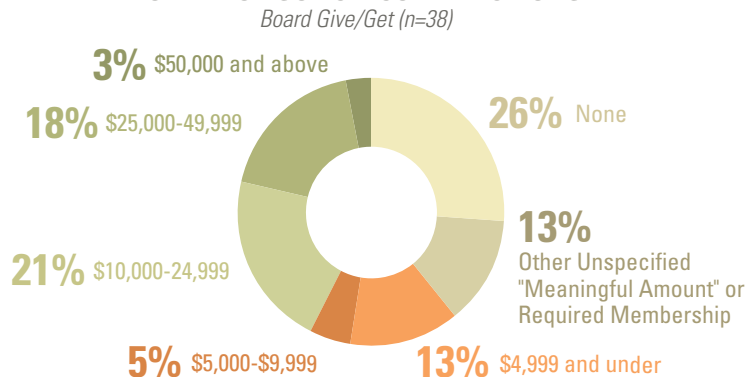
RACE AND ETHNICITY OF STAFF REFLECT BROADER SOCIETAL DEMOGRAPHICS, BOARDS LESS DIVERSE



MAJORITY OF STAFF ARE AGES 30-54



MOST BOARD MEMBERS ARE REQUIRED TO DONATE OR SOLICIT CONTRIBUTIONS



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ABOUT THIS REPORT

The National LGBT 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 (LGBT) advocacy, issue, legal, and research and public education organizations.



movement advancement project ▶

1905 15th Street #1097 • Boulder, CO 80306-1097
www.lgbtmap.org