

2019 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.

Contact Information

Movement Advancement Project

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

MAP is very grateful to the following major funders, whose generous support makes it possible for us to do our work:

David Bohnett Foundation
David Dechman & Michel Mercure
Ford Foundation
Gill Foundation
Esmond Harmsworth
Evelyn & Walter Haas, Jr. Fund
Jim Hormel
Johnson Family Foundation
Laughing Gull Foundation
The Amy Mandel & Katina Rodis Fund
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).

TABLE OF CONTENTS

| | |
|--------------------------------------|---|
| KEY FINDINGS..... | 1 |
| METHODOLOGY | 3 |
| REVENUE & EXPENSES | 4 |
| FINANCIAL TRENDS..... | 5 |
| INDICATORS OF FINANCIAL HEALTH | 6 |
| FUNDRAISING..... | 7 |
| STAFF & BOARD | 8 |



KEY FINDINGS

The *2019 National LGBTQI Movement Report* provides a comprehensive snapshot of the financial health of many of the United States' largest lesbian, gay, bisexual, transgender, queer, and intersex (LGBTQI) social justice organizations. These organizations were categorized by MAP as focusing on broad LGBTQI advocacy, issue-specific advocacy, legal advocacy, or research and public education.

The report finds that, at the end of the 2018 fiscal year, the participating organizations remain efficient, focused on providing important programs and services, and are supported by a diverse range of revenue sources. Organizations reported cumulative increases in support from foundations, corporations, and bequests.

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

- Revenue
- Expenses
- Financial Trends
- 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: Continued Increase in Revenue

- The 40 participating organizations had a total combined 2018 revenue of \$299.3 million.
- Including in-kind revenue, these organizations reported an aggregate 8% revenue increase from 2017 to 2018. Excluding in-kind revenue, participating organizations' revenue increased 10% from 2017 to 2018.
- Revenue from in-kind contributions increased by 1% from 2017 to 2018.
- 2018 revenue exceeded 2018 expenses by \$29.8 million.

- Revenue from individual donor contributions decreased slightly by -2% from 2017 to 2018. Overall, these individual donations comprised the largest share (32%) of organizations' total revenue in 2018.
- Fourteen organizations reported revenue declines over the past fiscal year. These organizations reported an average 26% decline in revenue in 2018 compared to 2017.
- Organizations that provided five-year trend data reported an aggregate 47% increase in revenue (including in-kind) from 2014 to 2018.

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

- Total 2018 expenses were \$269.8 million, and the majority of expenses (79%) are spent on programs and services.
- Expenses (including in-kind) increased 6% over the past year (2017 to 2018). Excluding in-kind, participating organizations' expenses increased 7% over the past year.
- Participating organizations project 2019 budgets will exceed 2018 spending by 14% (excluding in-kind expenses).
- Organizations that provided five-year trend data reported an aggregate 33% increase in expenses (including in-kind) from 2014 to 2018 demonstrating growth in programs and services.

Improved Financial Health: Five-Year Highs Across Multiple Measures

- Participating organizations reported an average of 279 days of working capital in 2018, a 14% increase from 2017 and a five-year high for these organizations.
- From 2017 to 2018, daily cash expenditures increased 8% to an average of \$14,900 per day for the 37 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 2018, participating organizations saw a 15% increase in the number of individual donors from 2017.
- Over the last year (2017-2018), large donors (\$25,000+) increased by 29%. Medium donors (\$1,000-\$24,999) increased by 7%, and small donors (\$35-\$999) increased by 4%.

- The number of individuals who attended fundraising events decreased by 13% from 2017 to 2018. The five-year trend shows that attendees at fundraising events decreased by 5% from 2014 to 2018.
- Based on the number of donors to participating organizations (assuming that all donors are LGBTQI and there are no duplicates) and the total number of LGBTQI adults in the United States, data reported by participating organizations suggest that only 3.4% of LGBTQI people contributed any amount in 2018 to participating organizations.

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

- Participating organizations employed a total of 1,028 full-time and 165 part-time staff.
- Organizations that reported staff demographics have diverse staff that reflect the overall population. Fifty-four percent of staff are white or Caucasian, while 15% identify as Black, 14% as Latinx, 8% Asian or Pacific Islander, 1% as Native American, 4% as multiracial, and 4% as some other race or ethnicity.
- Among senior staff and board members of LGBTQI organizations, 62% of senior staff are white as are 65% of board members.
- Slightly less than half of all staff identify as men (40%) and 47% identify as women, while 6% identify as non-binary and 6% as genderqueer or some other identity. Fifteen percent of staff identify as transgender. The majority (59%) of staff is between the ages of 30 and 54.
- Among board members, 49% identify as men, 46% as female, 1% as non-binary, and 4% as genderqueer or some other identity. Eight percent of board members identify as transgender.
- Of organizations providing data on the sexual orientation of their staff, 45% of staff identified as gay or lesbian, 10% as bisexual, 16% as queer, 15% as another orientation, and 14% as heterosexual.
- Of organizations providing data on the sexual orientation of their board, 69% of board members identified as gay or lesbian, 2% as bisexual, 10% as queer, 3% as another orientation, and 16% as heterosexual.

2019 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT



METHODOLOGY

The Movement Advancement Project (MAP) selected the 40 participating organizations based on their size, importance to the overall LGBTQI movement, and collective coverage of LGBTQI issues and constituencies. Most participating organizations (32) have budgets over \$1 million; eight 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. Where figures or charts reflect data based on a subset of participating organizations, this is noted.

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

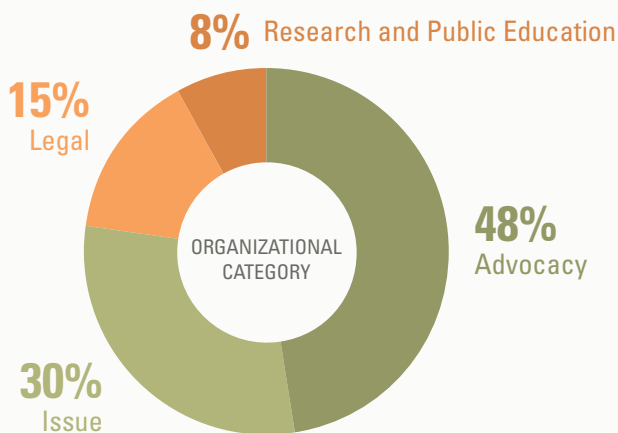
PARTICIPATING LGBTQI ORGANIZATIONS ARE COMPRISED OF ADVOCACY ORGANIZATIONS, ISSUE ORGANIZATIONS, LEGAL ORGANIZATIONS, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS (n=40)

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.

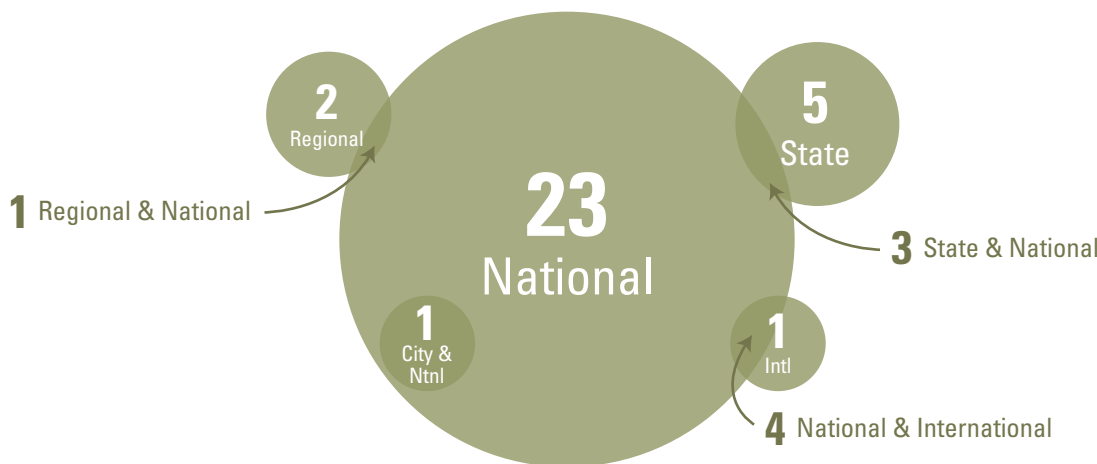
Legal organizations provide legal services to LGBTQI people and advocate and/or litigate within the legal system for LGBTQI people.

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, figures, charts, and numbers in the 2019 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.

2019 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT



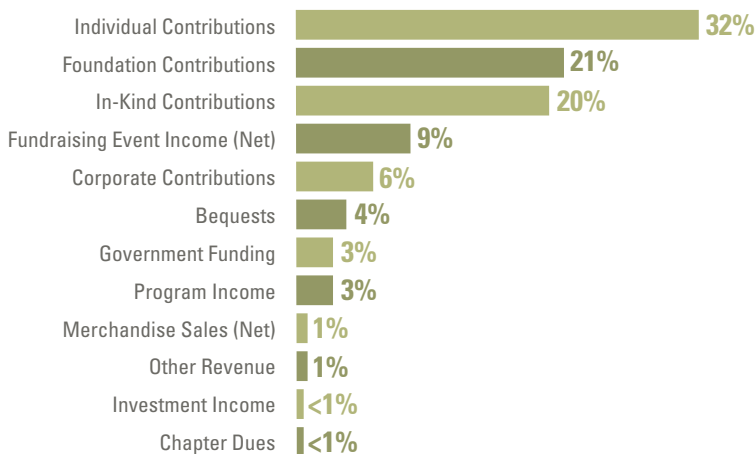
REVENUE AND EXPENSES

This section provides an overview of the revenue and expenses for 40 of the leading organizations in the LGBTQI movement. For participating organizations, revenue and expenses increased from 2017 to 2018. 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 2014 are not included in the longitudinal analyses.

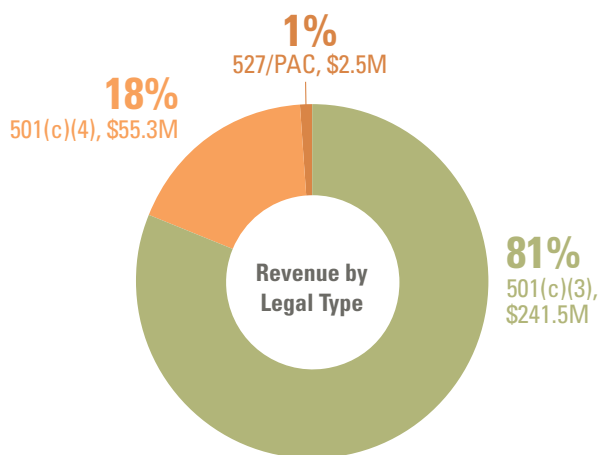
ALL PARTICIPANTS (N=40), TOTAL 2018 REVENUE = \$299.3M, TOTAL 2018 EXPENSES = \$269.8M

INDIVIDUAL CONTRIBUTIONS REMAIN TOP SOURCE OF REVENUE AMONG LGBTQI ORGANIZATIONS

2018 Revenue by Source



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



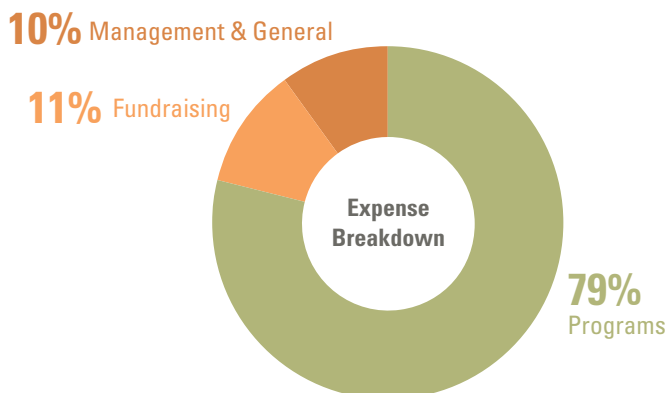
2017-2018 EXPENSES FOR PARTICIPATING ORGS \$ Millions

| EXPENSES | 2017 | 2018 | % INCREASE/DECREASE |
|------------------------------|---------|---------|---------------------|
| PROGRAM SERVICES EXPENSE | \$205.0 | \$213.0 | 4% |
| FUNDRAISING EXPENSE | \$26.3 | \$30.5 | 16% |
| MANAGEMENT & GENERAL EXPENSE | \$23.5 | \$26.2 | 12% |
| TOTAL EXPENSES | \$254.8 | \$269.8 | 6% |

*Note: Columns may not sum due to rounding.

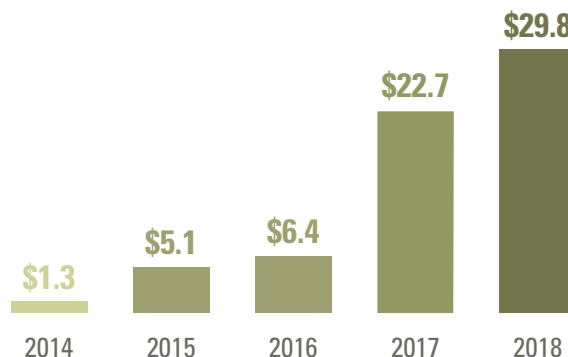
MAJORITY OF MOVEMENT EXPENSES (79%) SPENT ON PROGRAMS AND SERVICES

All Participants Combined, 100% = \$269.8 million



2018 REVENUE EXCEEDED EXPENSES BY \$29.8 MILLION

Yearly Difference in Revenue and Expenses, 2014-2018, in Millions (n=38)



2019 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT



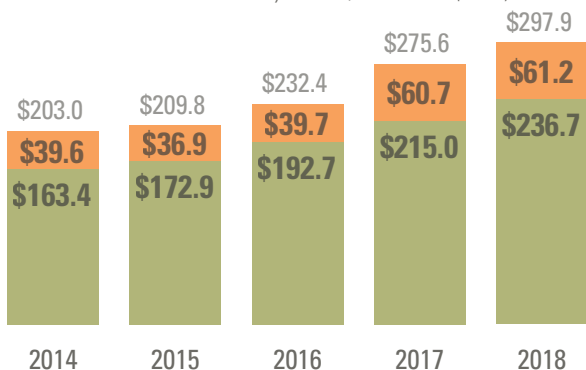
FINANCIAL TRENDS

This graphic examines the financial capacity of LGBTQI movement organizations from 2014 through 2018. At the end of the 2018 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 2014 are not included in the longitudinal analyses.

38 PARTICIPANTS, TOTAL 2018 REVENUE = \$297.2M, TOTAL 2018 EXPENSES = \$268.1M

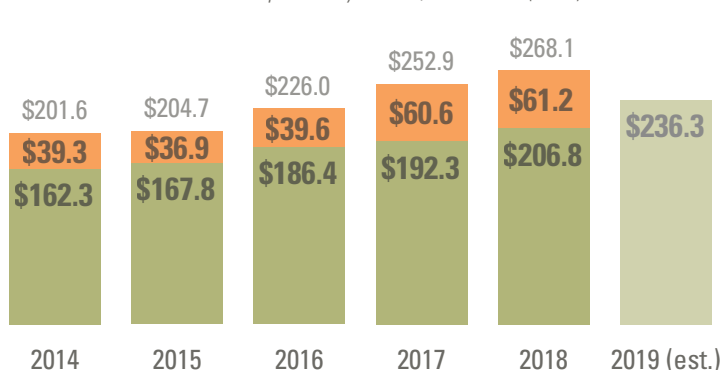
COMBINED REVENUE INCREASED 47% FROM 2014 TO 2018

2014-2018 Revenue by Source, in Millions (n=38)



COMBINED EXPENSES INCREASED 33% FROM 2014 TO 2018

2014-2018 Expenses by Source, in Millions (n=38)



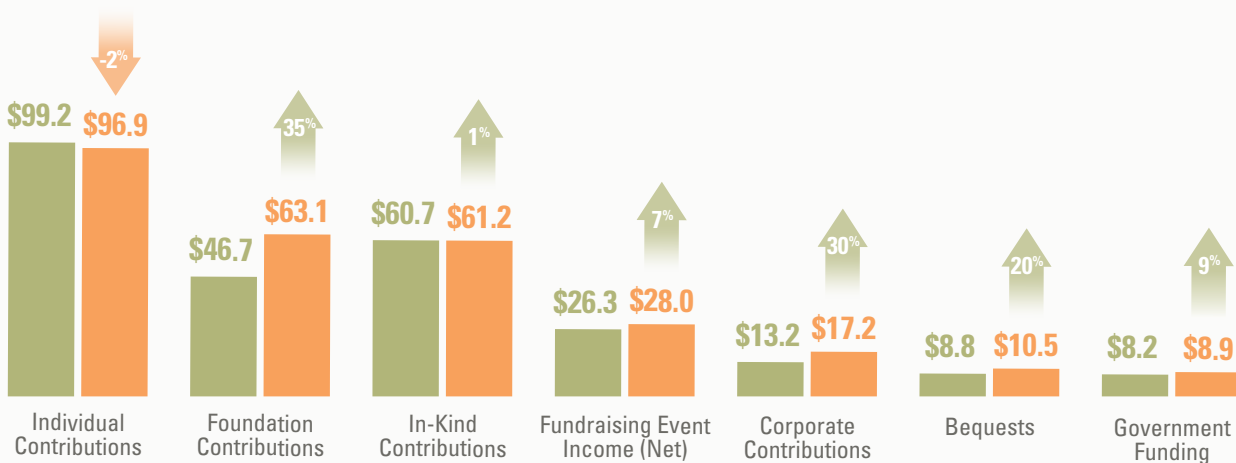
■ Minus In-Kind Expenses/Revenue ■ In-Kind Expenses/Revenue

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

2018 SAW SUBSTANTIAL INCREASES IN FOUNDATION AND CORPORATE SUPPORT AND BEQUESTS

Revenue Change by Source from 2017 to 2018, in Millions

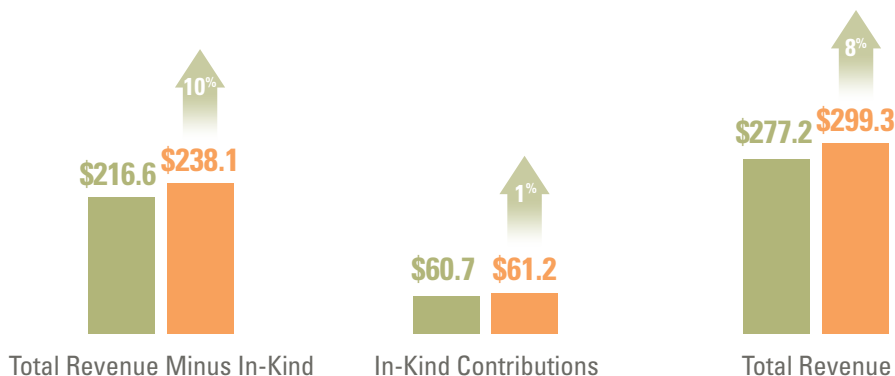
■ 2017 ■ 2018



COMBINED REVENUE INCREASED 8% FROM 2017 TO 2018

Total Revenue Change from 2017 to 2018, in Millions

■ 2017 ■ 2018



2019 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT

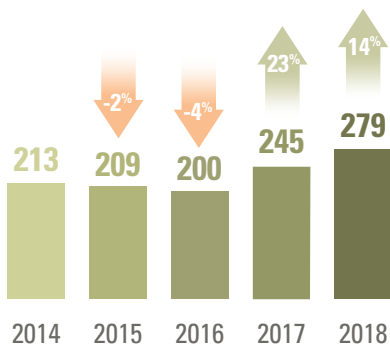


INDICATORS OF FINANCIAL HEALTH

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 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 2014 are not included in the longitudinal analyses.

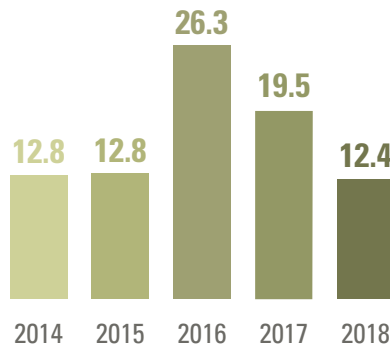
DAYS OF WORKING CAPITAL INCREASED 14% FROM 2017 TO 2018

2014-2018 Average Days of Working Capital (n=37)



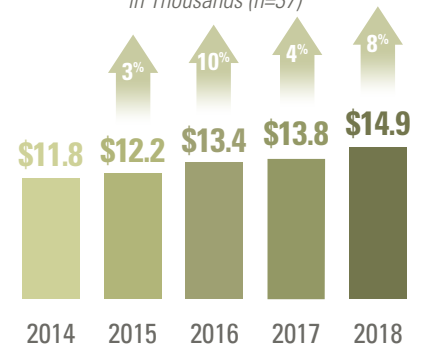
ORGANIZATIONS REPORT LOWER LIQUIDITY RATIO THAN IN RECENT YEARS

2014-2018 Average Liquidity Ratio (n=35)



DAILY CASH EXPENDITURES INCREASED 8% FROM 2017 TO 2018

2014-2018 Cumulative Average Daily Cash Expense, in Thousands (n=37)



39 PARTICIPATING ORGANIZATIONS

2017-2018 STATEMENT FINANCIALS TREND DATA \$ Millions

| | 2017 | 2018 | % INCREASE/DECREASE |
|---|--------------|--------------|---------------------|
| Assets | | | |
| Cash and Cash Equivalents | 45.9 | 59.2 | 29% ↑ |
| Investments | 66.0 | 69.3 | 5% ↑ |
| Other Current Assets | 33.4 | 40.9 | 22% ↑ |
| Net Fixed Assets | 34.1 | 33.5 | -2% ↓ |
| Other Long-Term Assets | 7.9 | 19.7 | 148% ↑ |
| Total Assets | 187.3 | 222.6 | 19% ↑ |
| Liabilities | | | |
| Current Liabilities | 17.4 | 20.3 | 17% ↑ |
| Long-Term Debt | 2.3 | 8.8 | 286% ↑ |
| Other Long-Term Liabilities | 10.3 | 3.6 | -65% ↓ |
| Total Liabilities | 30.0 | 32.8 | 9% ↑ |
| Net Assets | | | |
| Unrestricted | 97.0 | 104.8 | 8% ↑ |
| Temporarily Restricted | 33.9 | 58.1 | 71% ↑ |
| Permanently Restricted | 26.5 | 26.9 | 1% ↑ |
| Total Net Assets | 157.3 | 189.8 | 21% ↑ |
| Total Liabilities and Net Assets | 187.3 | 222.6 | 19% ↑ |

*Note: Columns may not sum due to rounding.

2019 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT



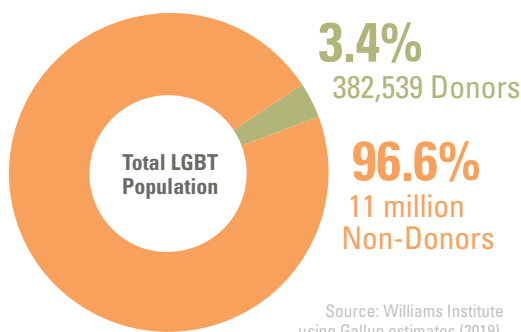
FUNDRAISING AND FUNDRAISING EFFICIENCY

Like most other nonprofits, participating organizations rely on fundraising to generate a significant portion of their revenue. This section examines the ways in which LGBTQI 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 2014 are not included in the longitudinal analyses.

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

3.4% OF LGBTQI POPULATION CONTRIBUTES TO PARTICIPATING ORGANIZATIONS

Combined Donors Giving Any Amount vs. Total Adult LGBTQ Population (n=39)

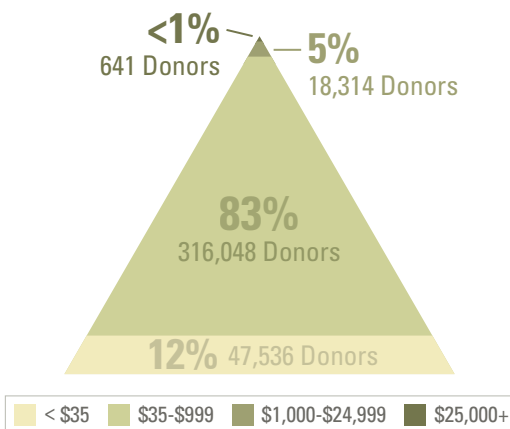


Source: Williams Institute using Gallup estimates (2019).

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

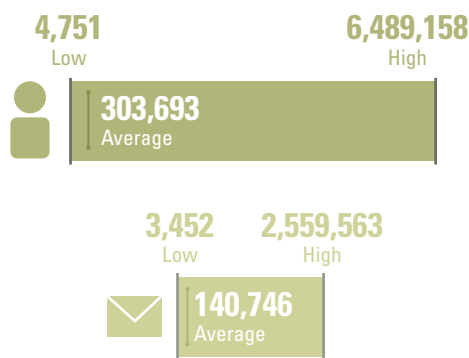
SMALL DONATIONS COMPRISE THE MAJORITY OF DONOR CONTRIBUTIONS

2018 Donor Pyramid (n=39)



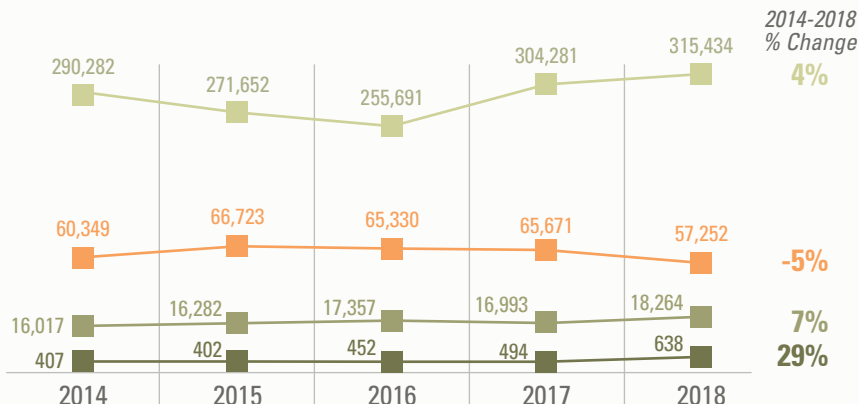
MAIL AND EMAIL CONTACTS VARY GREATLY

Contactable Names and Emails (n=32)



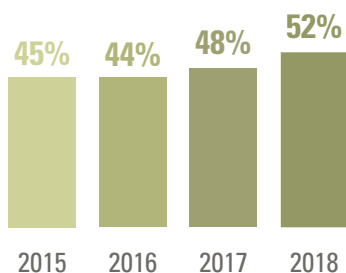
GROWTH IN LARGE & MEDIUM DONORS EXCEEDS GROWTH IN SMALL DONORS

2014-2018 Number of Donors (n=37)



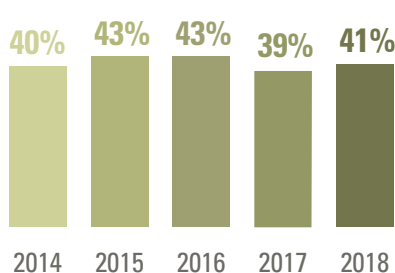
DONOR TURNOVER REMAINS BETTER THAN INDUSTRY

2015-2018 Donor Turnover



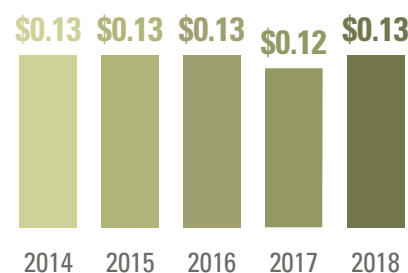
CONTRIBUTIONS FROM TOP 10 DONORS REMAIN STABLE OVER TIME

2014-2018 Percent of Revenue from Top Ten Contributors (n=37)



ORGANIZATIONS' FUNDRAISING EFFORTS REMAIN EFFICIENT OVER TIME

2014-2018 Overall Cost to Raise \$1 (n=38)



2019 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT

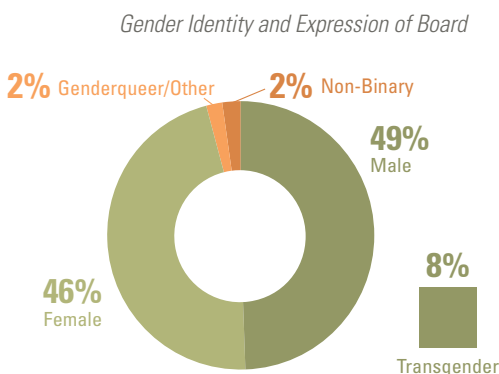
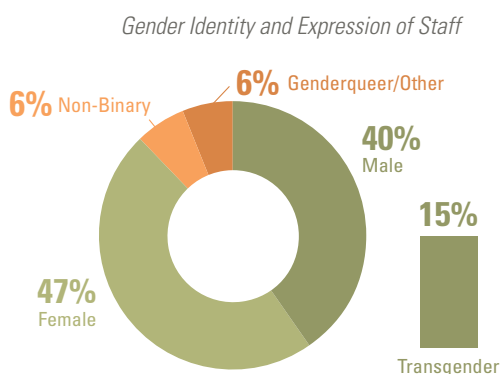


STAFF AND BOARDS

This section examines the staff and boards of participating organizations. Organizations were asked questions about their staff and board demographics, including gender identity 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.

1,193 TOTAL STAFF (1,028 FULL TIME; 165 PART TIME) & 744 BOARD MEMBERS

ORGANIZATIONS' STAFF & BOARDS HAVE GENDER DIVERSITY



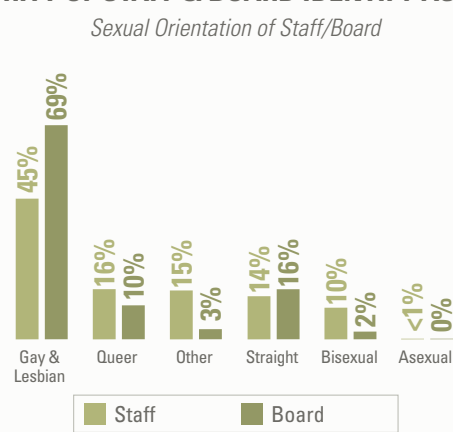
BROAD AVERAGE SALARY RANGE FOR SENIOR STAFF



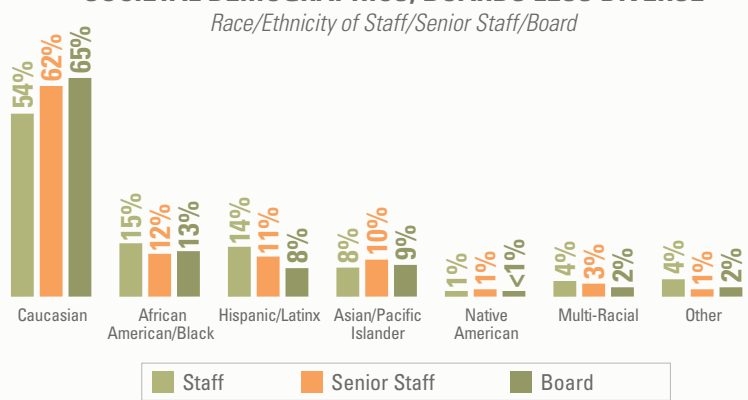
TENURE OF SENIOR STAFF VARIES GREATLY



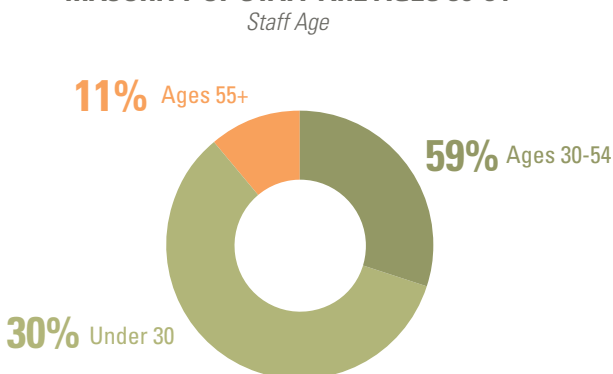
MAJORITY OF STAFF & BOARD IDENTIFY AS LGBTQ



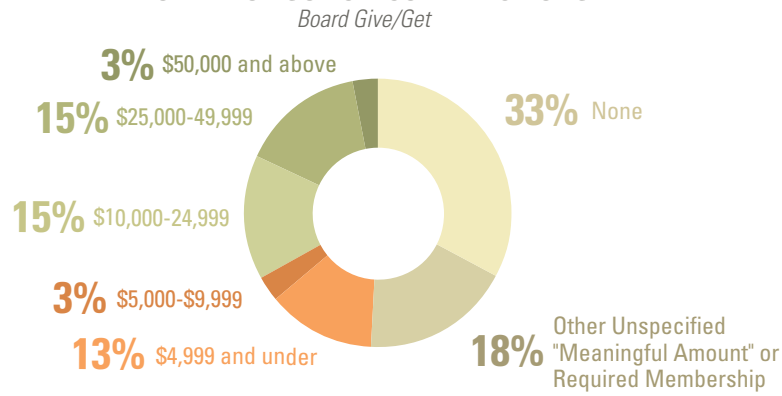
RACE AND ETHNICITY OF STAFF REFLECT BROADER SOCIETAL DEMOGRAPHICS, BOARDS LESS DIVERSE



MAJORITY OF STAFF ARE AGES 30-54



MOST BOARD MEMBERS ARE REQUIRED TO DONATE OR SOLICIT CONTRIBUTIONS



This page intentionally left blank

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 ▶

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