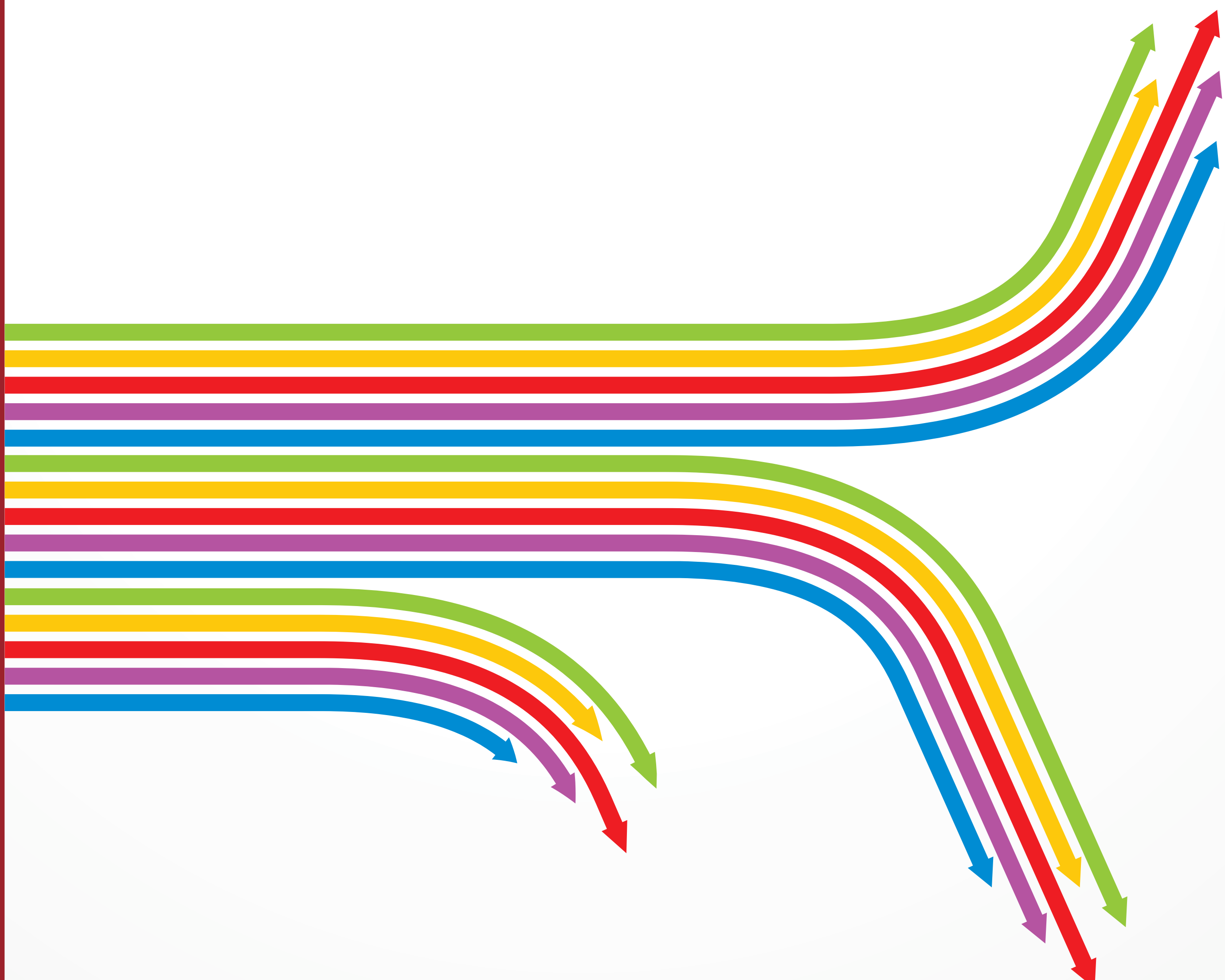
2022 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT



JANUARY 2023

MAP
movement advancement project

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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This report is part of an annual series assessing the financial health of major organizations in the LGBTQI movement. To see previous reports in the series, as well as other research on the capacity of the LGBTQI movement, please visit www.mapresearch.org/lgbt-advocacy-organizations.

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Participating Organizations by Category

Advocacy

Basic Rights Oregon	interACT: Advocates for Intersex Youth
Campaign for Southern Equality	Keshet
Equality Federation	LGBTQ Victory Fund & Victory Institute
Equality Florida	National Center for Transgender Equality (NCTE)
Equality North Carolina	National LGBTQ Task Force
Family Equality	National Queer Asian Pacific Islander Alliance (NQAPIA)
Freedom for All Americans	PFLAG
Georgia Equality	SAGE: Advocacy & Services for LGBT Elders
GLAAD	True Colors United
Human Rights Campaign (HRC)	

Issue

CenterLink	Out & Equal
GLSEN	Point Foundation
Genders & Sexualities Alliance (GSA) Network	Reconciling Ministries Network (RMN)
Immigration Equality	Soulforce
The New York City Anti-Violence Project (NYCAVP)	The Trevor Project

Legal

ACLU Jon L. Stryker and Slobodan Randjelović LGBTQ & HIV Project	National Center for Lesbian Rights (NCLR)
GLBTQ Legal Advocates and Defenders (GLAD)	Transgender Law Center (TLC)
Lambda Legal	

Research & Public Education

Movement Advancement Project (MAP)

Note: One organization wishes to remain anonymous and is excluded from this list.
See the Methodology infographic (page 5) for definitions of organization categories.

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.

Amid the ongoing COVID-19 pandemic, the NMR series remains particularly important. Since the onset of the pandemic, MAP has conducted surveys of leading LGBTQI organizations regarding the impacts of COVID-19, including the 2021 NMR report that assessed the first full fiscal year under COVID-19.[1] This year's report shows the ongoing impacts of COVID-19, including that, while participating organizations ended the fiscal year with relatively strong overall financial standing, there are important emerging trends in specific revenue streams and fundraising. Additionally, these financially-focused data do not necessarily reflect the many tremendous challenges facing many organizations and their staff, including ongoing impacts to staff mental and physical health.

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.

[1] For additional research on the impact of COVID-19 on LGBTQI movement organizations, including on movement staff and mental health, see MAP's ongoing research at www.mapresearch.org/covid-19.

Revenue & Expenses: Shifting Patterns

- Across 36 participating organizations, **combined 2021 revenue** totaled $386 million, exceeding combined 2021 expenses ($267 million) by roughly $119 million—a dramatically higher differential than pre-2020, though this may be at least partly due to government support during the pandemic.
- From 2020 to 2021, organizations reported **mixed patterns in different sources of revenue, with some increasing and some decreasing by significant margins.** For example, revenue from fundraising events, in-kind contributions, and corporate contributions all declined sharply, while revenue from other sources like individual contributions and foundations increased. This highlights the continually changing landscape for movement organizations' funding and revenue stability, particularly as practices around in-person fundraising events continued to evolve during the second year of the pandemic.
- **Individual donations** comprise the largest share (41%) of organizations' 2021 combined revenue.
- The majority (78%) of organizations' **combined 2021 expenses** were spent on programs and services, with 11% spent on management and general costs and the remaining 11% on fundraising.

Indicators of Financial Health

- All organizations that provided five-year trend data report a five-year average **liquidity ratio** above one, meaning all organizations have consistently maintained enough cash and liquid assets on hand to at least cover their current financial obligations. In fact, nearly two-thirds (66%) of organizations report a five-year average liquidity ratio over seven, meaning they can cover their liabilities more than seven times over with what they have on hand. This reflects a longer-term strength and consistency, at least at the aggregate level, that may help mitigate the impact of economic shocks such as the pandemic.
- Participating organizations reported an average of 483 days of **working capital** in 2021, a 15% increase from the previous year.

Fundraising: Declines in Number of Donors, Though Total Revenue from Individual Donors Grew

- In 2021, responding organizations (n=28) reported a combined total of over 355,000 individual donors. The vast majority of these **individual donors** (97%) gave under $1,000 in 2021, including nearly two in five donors (36%) who gave under $35 in 2021. However, the revenue from these smaller-level donors accounted for only roughly 13% of revenue from individual donations; as might be expected, the large majority of revenue from individual donations came from donors giving at larger amounts.
- Among organizations that provided five-year trend data (2017 to 2021; n=27), the total number of donors was significantly impacted by COVID-19, and in this second year of the pandemic, the number of donors at nearly every size fell by significant margins.
  - From fiscal years 2017 to 2019 (i.e., pre-COVID), the number of **large donors** ($25,000+ per year) increased by 5% and rose slightly in the first year of the pandemic. From 2020 to 2021, however, the number of large donors fell by 28%.
  - From 2017 to 2019, the number of **medium donors** ($1,000-$24,999 per year) increased by 5% and rose even further in the first year of the pandemic. From 2020 to 2021, however, the number of medium donors fell by 35%.
  - From 2017 to 2019, the number of **small donors** ($35-$999 per year) increased by 1%, but in 2020 fell by roughly 9%. From 2020 to 2021, the number of small donors slightly grew, by 1%.
  - Five-year trend data are not yet available for **micro donors** (<$35 per year), but participating organizations reported a 23% decrease in these donors from 2020 to 2021.
- Despite these declines in the number of *people* donating, the **total *revenue* from individual donations** grew from 2020 to 2021, suggesting that individuals may be giving at larger amounts than in the previous year. Across organizations that provided the above trend data on donors (n=27), total revenue from individual donors grew 21% from 2020 to 2021.
- Among reporting organizations, the number of **individuals that attend fundraising events** was slightly declining (3%) from 2017 to 2019, but then decreased 36% from 2019 to 2020 amidst the first year of the pandemic. From 2020 to 2021, the number of attendees again fell, this time by 80%. Importantly, this question asks specifically about fundraising events that cost at least $100 per ticket or person to attend, focusing on larger scale events (e.g., galas). Therefore, this does not capture other types of fundraising events, including the types of events that have become more commonplace during the pandemic, such as virtual and smaller scale fundraisers. More research is needed to better understand how movement organizations are adapting fundraising efforts in the face of both continuing and new challenges such as these.

Staff: Demographically Diverse in Race, Gender, & More

- Reporting organizations (n=31) employed a total of 969 paid staff in fiscal year 2021, 94% of whom are full-time workers. The **average staff size** at participating organizations is 25 staff, and the median is 20. Staff size ranges from a low of two to a high of 210.
- Not all organizations reported staff demographics. Among those that did:
  - Organizations reported **racially** diverse staff, with 50% of all staff and 42% of all senior staff being people of color. Among all staff, 18% are Black or African American, 15% are Hispanic or Latino, 8% are Asian or Pacific Islander (API), 4% are multi-racial, 1.2% are Native American, and 3% identify as another race or ethnicity.[2]
  - Organizations reported that 48% of all staff identify as women, 37% as men, 10% as nonbinary, and 5% as genderqueer or another **gender identity**.
  - Organizations reported that 16% of staff and 12% of senior staff identify as **transgender**. Nationally, an estimated 0.5% of the adult population identifies as transgender.[3]

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[2] According to the U.S. Census Bureau, in 2021, people of color comprised 40.7% of the U.S. population. This includes 13.6% who were Black or African American alone, 18.9% who were Hispanic or Latino, 6.4% who were Asian or Pacific Islander alone, and 1.3% who were Native American alone.

[3] Jody Herman, Andrew Flores, and Kathryn O'Neill. June 2022. *How Many Adults And Youth Identify as Transgender in the United States?* Los Angeles, CA: The Williams Institute.

Boards: Demographically Diverse, Though Less So Than Staff

- Reporting organizations (n=31) reported a total of 551 board members, with an **average board size** of 18 members and a median of 15. The smallest board is comprised of six members, and the largest of 49.
- Among organizations that reported demographic about their boards:
  - Boards are less **racially** diverse than staff: 50% of staff are people of color, compared to 43% of board members and 45% of executive board members. In particular, board members are much less likely than staff to be Hispanic or Latino, or Native American.
  - Overall, 47% of board members identify as men, 47% as women, 3% as nonbinary, and 2% as genderqueer or another **gender identity**. Boards have significantly fewer members who are nonbinary, genderqueer, or another gender: 15% of all staff are nonbinary, genderqueer, or another gender, as are 11% of senior staff, but these numbers drop to 5% among boards and 4% among executive boards.
  - Nine percent (9%) of board members and 8% of executive board members identify as **transgender**.

METHODOLOGY

The Movement Advancement Project (MAP) invited organizations to participate based on their size, importance to the overall LGBTQI movement, and collective coverage of LGBTQI issues and constituencies. Of the 36 that chose to participate, most participating organizations (32) 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. Where figures or charts reflect data based on a subset of participating organizations, this is noted.

36 PARTICIPANTS, TOTAL 2021 REVENUE = $385.8M, TOTAL 2021 EXPENSES = $267.3M

PARTICIPATING LGBTQI ORGANIZATIONS ARE COMPRISED OF ADVOCACY, ISSUE, LEGAL, AND RESEARCH & PUBLIC EDUCATION ORGANIZATIONS

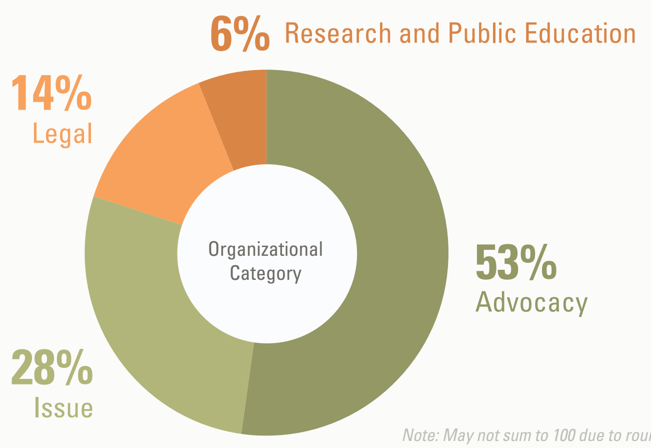
(n=36)

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.

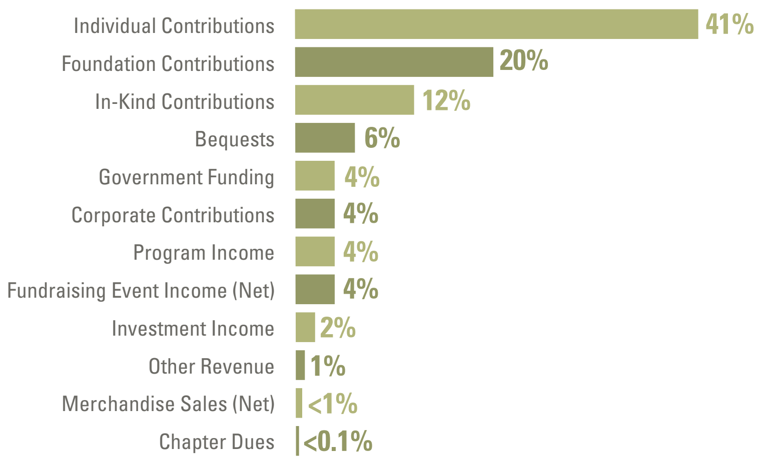
REVENUE AND EXPENSES

This section provides an overview of the revenue and expenses of leading organizations in the LGBTQI movement. For participating organizations, revenue increased from fiscal years 2020 to 2021, while expenses fell. Note: on this page, some analyses required data from previous years. Only organizations that provided data for all years in each relevant analysis are included. Note also that, where applicable, percentages may not sum to 100 due to rounding.

36 PARTICIPANTS, TOTAL 2021 REVENUE = $385.8M, TOTAL 2021 EXPENSES = $267.3M

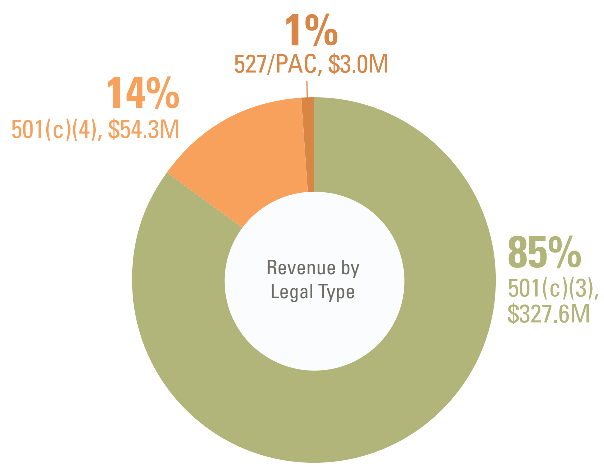
INDIVIDUAL CONTRIBUTIONS REMAIN TOP SOURCE OF REVENUE AMONG LGBTQI ORGANIZATIONS

2021 Revenue by Source (n=36)



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

2021 Revenue By Legal Type (n=36)



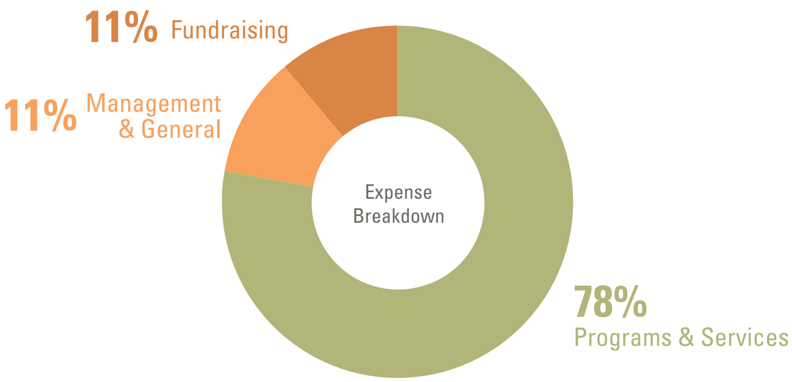
2020-2021 EXPENSES FOR PARTICIPATING ORGS $ Millions (n=36)

EXPENSES	2020	2021	% CHANGE
Programs & Services	$226.3	$208.3	-8%
Fundraising Expenses	$31.9	$29.1	-9%
Management & General Expenses	$29.9	$29.9	—
Total Expenses	**$288.1**	**$267.0**	**-7%**

*Note: Columns may not sum due to rounding.

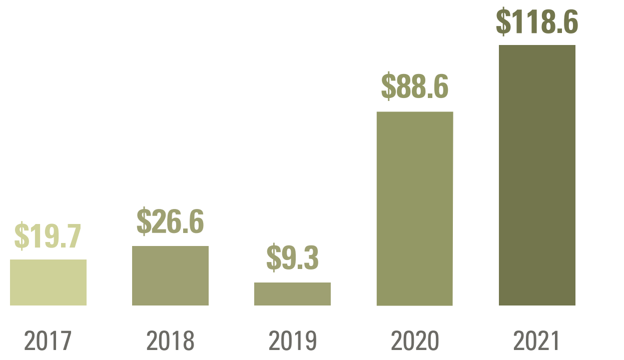
MAJORITY OF MOVEMENT EXPENSES (78%) SPENT ON PROGRAMS AND SERVICES

Combined 2021 Expenses (n=36)



2021 REVENUE EXCEEDED EXPENSES BY $118.6 MILLION

Yearly Difference in Revenue and Expenses, 2017-2021, in Millions (n=36)



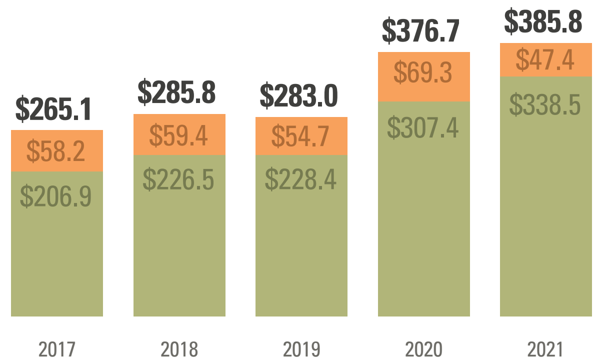
FINANCIAL TRENDS

This graphic examines the financial capacity of LGBTQI movement organizations from 2017 through 2021. At the end of the 2021 fiscal year, participating organizations as a whole remain well-resourced and supported by a diverse range of revenue sources, but in the second year of the COVID-19 pandemic, fundraising income continued to decline, while corporate and in-kind giving newly declined. 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.

36 PARTICIPANTS, TOTAL 2021 REVENUE = $385.8M, TOTAL 2021 EXPENSES = $267.3M

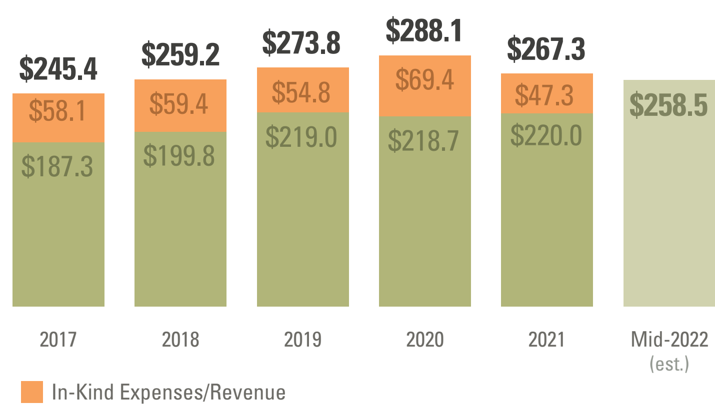
COMBINED REVENUE INCREASED 46% FROM 2017 TO 2021

2017-2021 Revenue by Source, in Millions (n=36)



COMBINED EXPENSES INCREASED 9% FROM 2017 TO 2021

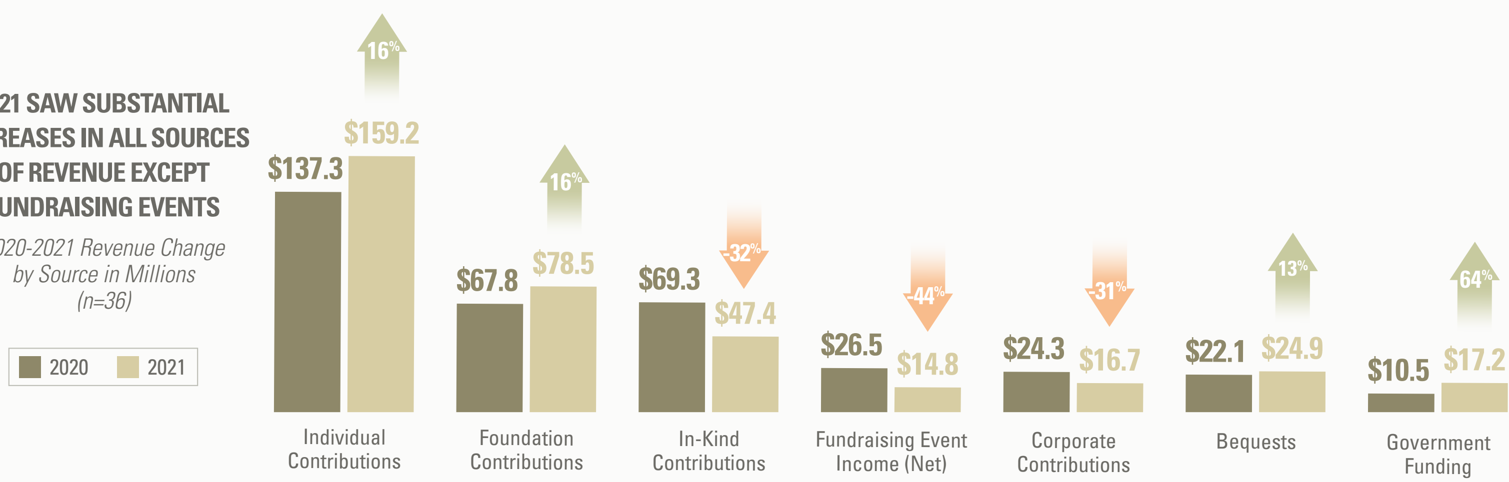
2017-2021 Expenses by Source, in Millions (n=36)



36 PARTICIPANTS, TOTAL 2021 REVENUE = $385.8M, TOTAL 2021 EXPENSES = $267.3M

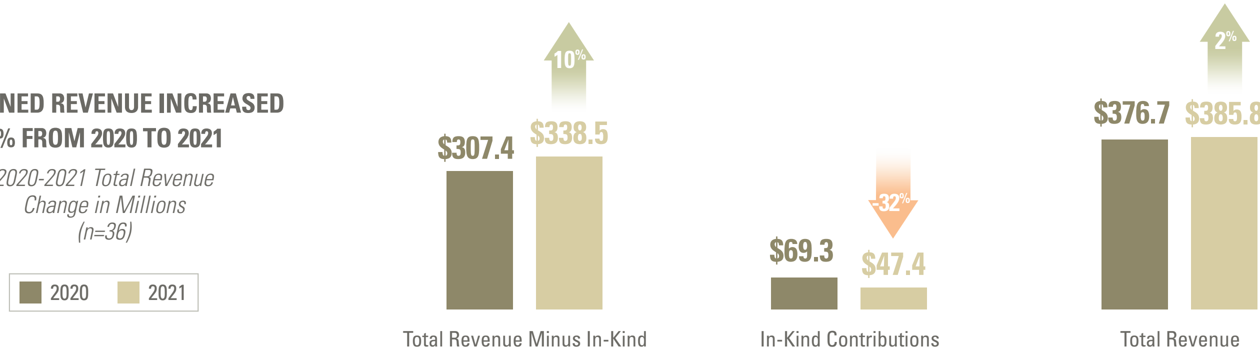
2021 SAW SUBSTANTIAL INCREASES IN ALL SOURCES OF REVENUE EXCEPT FUNDRAISING EVENTS

2020-2021 Revenue Change by Source in Millions (n=36)



COMBINED REVENUE INCREASED 2% FROM 2020 TO 2021

2020-2021 Total Revenue Change in Millions (n=36)

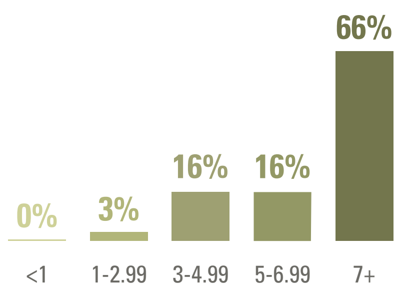


INDICATORS OF FINANCIAL HEALTH

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 liquidity ratio, days of working capital, and daily cash expense. Liquidity ratio measures cash and investments on hand to cover current financial obligations such as accounts payable and lines of credit. 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. 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.

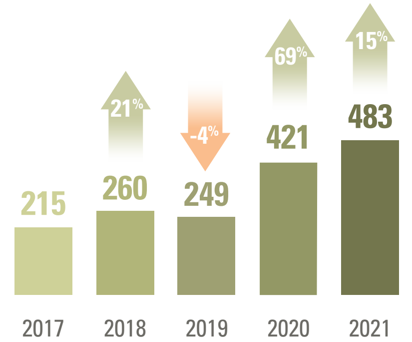
ROUGHLY TWO-THIRDS OF ORGANIZATIONS HAVE A 5-YEAR AVERAGE LIQUIDITY RATIO OVER 7

Percent of Organizations (n=32) by 2017-2021 Average Liquidity Ratio



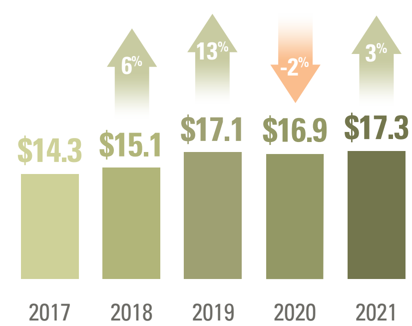
DAYS OF WORKING CAPITAL INCREASED 15% FROM 2020 TO 2021

2017-2021 Average Days of Working Capital (n=32)



DAILY CASH EXPENDITURES INCREASED 3% FROM 2020 TO 2021

2017-2021 Cumulative Average Daily Cash Expense, in Thousands (n=32)



2020-2021 STATEMENT FINANCIALS TREND DATA $ MILLIONS (N=34)

	2020	2021	% INCREASE/DECREASE
Assets			
Cash and Cash Equivalents	109.3	143.4	+31%
Investments	98.1	162.6	+66%
Other Current Assets	61.0	55.9	-8%
Net Fixed Assets	34.6	32.7	-5%
Other Long-Term Assets	20.7	24.2	+17%
Total Assets	**323.6**	**418.8**	**+29%**
Liabilities			
Current Liabilities	27.1	29.3	+8%
Long-Term Debt	8.3	8.6	+3%
Other Long-Term Liabilities	8.4	5.3	-36%
Total Liabilities	**43.8**	**43.2**	**-1%**
Net Assets			
Without Donor Restrictions	191.1	270.4	+42%
With Donor Restrictions	55.7	69.2	+24%
With Permanent Donor Restrictions	33.1	35.9	+8%
Total Net Assets	**279.9**	**375.5**	**+34%**
Total Liabilities and Net Assets	**323.6**	**418.8**	**+29%**

*Note: Columns may not sum due to rounding.

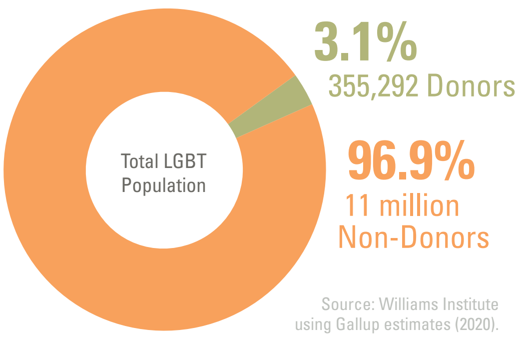
FUNDRAISING AND FUNDRAISING EFFICIENCY

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. Note: on this page, some analyses require data from previous years. Therefore, only organizations that provided data for all relevant years are included.

36 PARTICIPANTS, TOTAL 2021 REVENUE = $385.8M, TOTAL 2021 EXPENSES = $267.3M

3.1% OF LGBT POPULATION CONTRIBUTES TO PARTICIPATING ORGANIZATIONS

Combined Donors Giving Any Amount vs. Total Adult LGBT Population (n=28)

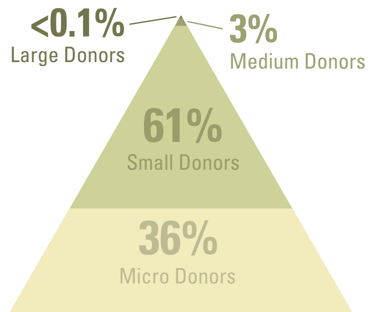


Source: Williams Institute using Gallup estimates (2020).

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

SMALL DONORS COMPRISE THE MAJORITY OF INDIVIDUAL DONORS

2021 Donor Pyramid (n=28)

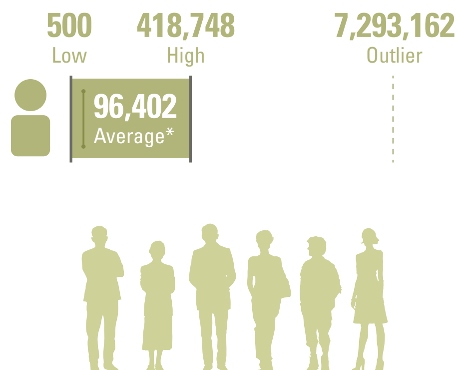


355,292 Total Donors

Annual donation amount:
Micro (< $35) **Small** ($35-$999) **Medium** ($1,000-$24,999) **Large** ($25,000+)

CONTACTABLE NAMES VARY GREATLY

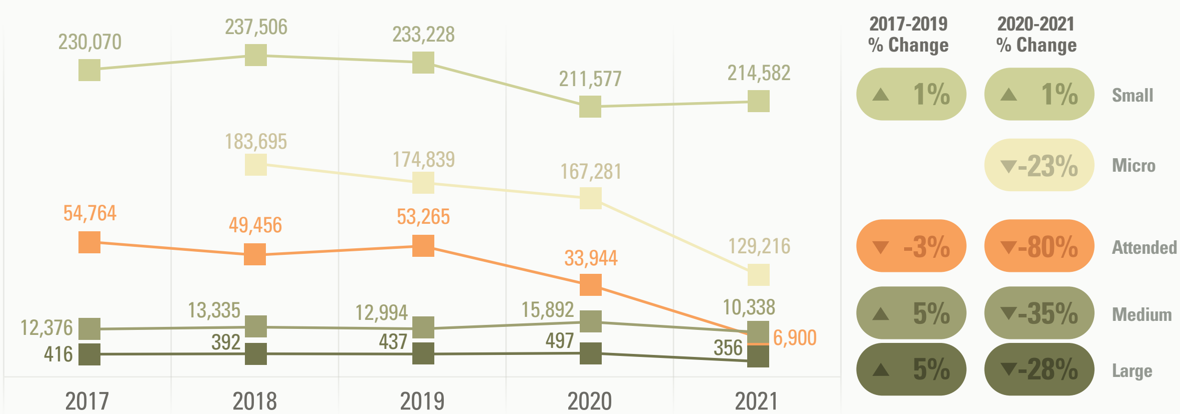
(n=32)



*Average does not include outlier datapoint.

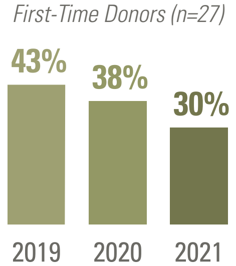
AMONG REPORTING ORGS, DECLINES IN NUMBER OF INDIVIDUAL DONORS

2017-2021 Number of Donors (n=27)



SHARE OF NEW DONORS IS DECLINING

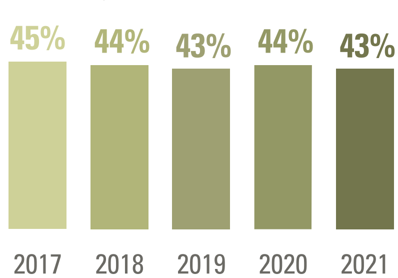
2020-2021 Percent of Donors That Are First-Time Donors (n=27)



Note: This metric was first asked in 2019, so earlier years' data are not available.

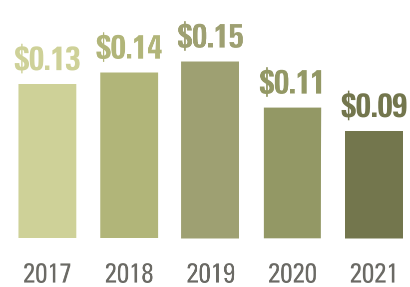
CONTRIBUTIONS FROM TOP 10 DONORS REMAIN STEADY

2017-2021 Percent of Revenue from Top Ten Contributors (n=26)



ORGANIZATIONS' AVERAGE COST TO FUNDRAISE FELL DURING 2021

2017-2021 Average Cost to Raise $1 (n=35)



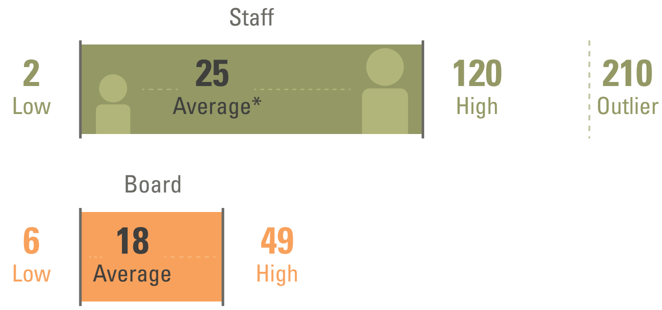
STAFF AND BOARDS

This section examines the staff and boards of participating organizations. Organizations were asked about staff size, tenure, and compensation, as well as board size and contribution policies.

REPORTING ORGS (N=31): 969 TOTAL STAFF (914 FULL TIME; 60 PART TIME) & 551 BOARD MEMBERS

STAFF AND BOARD SIZE VARY

(n=31)

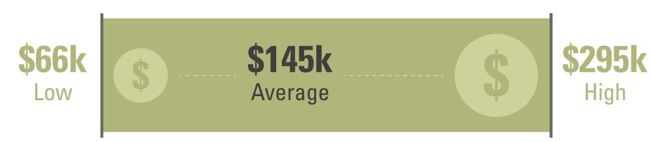


*Average does not include outlier datapoint.

FOR EVERY 4 BOARD MEMBERS, THERE ARE 7 STAFF MEMBERS

WIDE AVERAGE SALARY RANGE FOR SENIOR STAFF

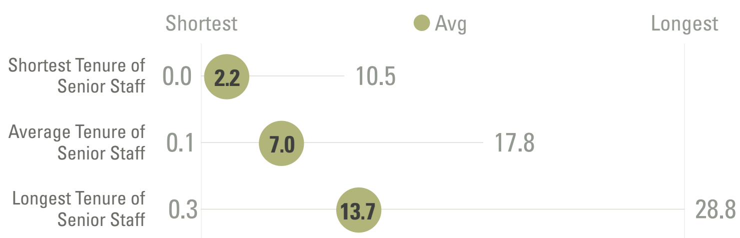
Average Senior Staff Compensation (n=30)



Organizations reported the average compensation across all senior staff. This graphic shows the lowest average, the average of averages, and the highest average senior staff compensation.

TENURE OF SENIOR STAFF VARIES GREATLY

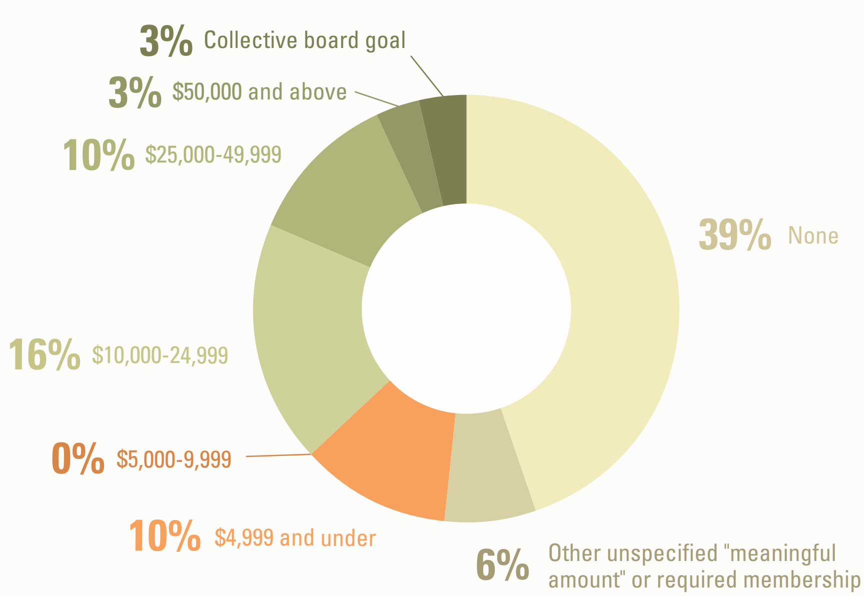
Shortest, Average, and Longest Tenure of Senior Staff, in Years (n=31)



Organizations reported the length of their shortest and longest tenured senior staff member, as well as the average tenure across all senior staff. This graphic shows the ranges of shortest tenure, the ranges of average tenure, and the ranges of longest tenure among senior staff.

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

Board Give/Get Policies (n=31)

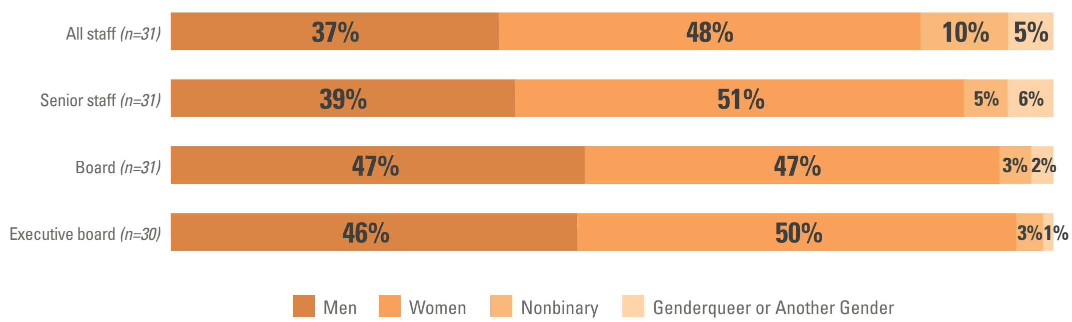


STAFF AND BOARDS

This section examines the staff and boards of participating organizations. Organizations were asked questions about their staff and board demographics, including age, gender identity, identification as transgender, sexual orientation, and race/ethnicity. Only some organizations provided each type of this information. 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.

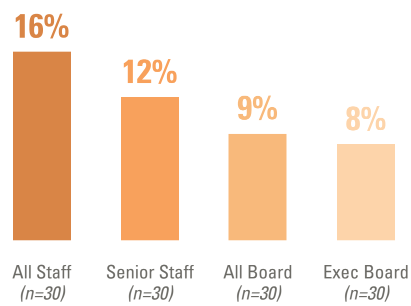
REPORTING ORGS (N=31): 969 TOTAL STAFF (914 FULL TIME; 60 PART TIME) & 551 BOARD MEMBERS

GENDER IDENTITY OF STAFF AND BOARD

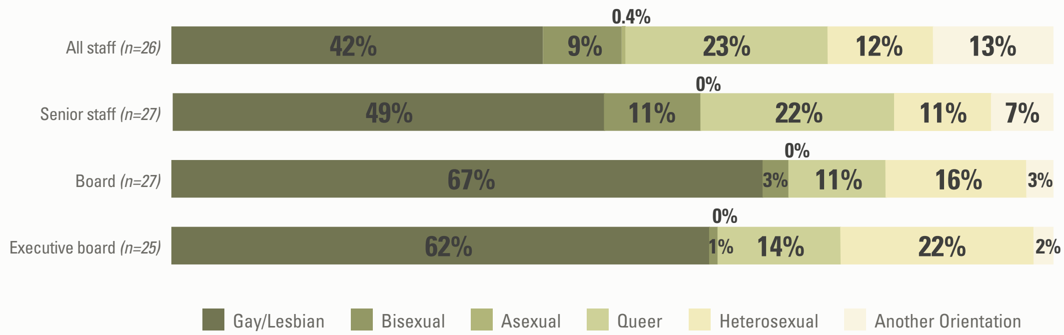


TRANSGENDER STATUS OF STAFF AND BOARD

% of staff/board that is transgender

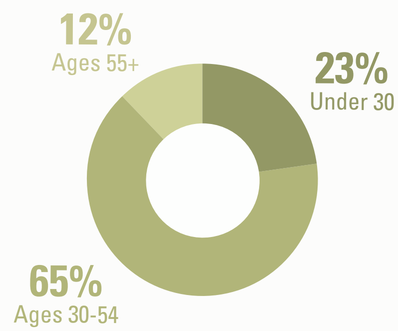


SEXUAL ORIENTATION OF STAFF AND BOARD

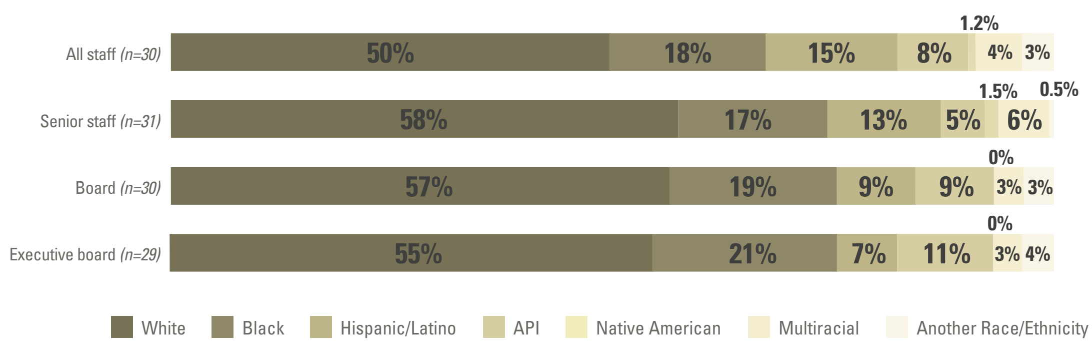


MAJORITY OF STAFF ARE AGES 30-54

(n=30)

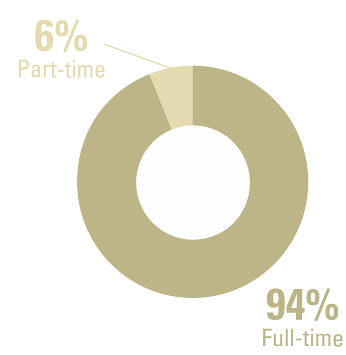


RACE/ETHNICITY OF STAFF AND BOARD



ONE IN 16 STAFF ARE PART-TIME WORKERS

(n=31)



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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