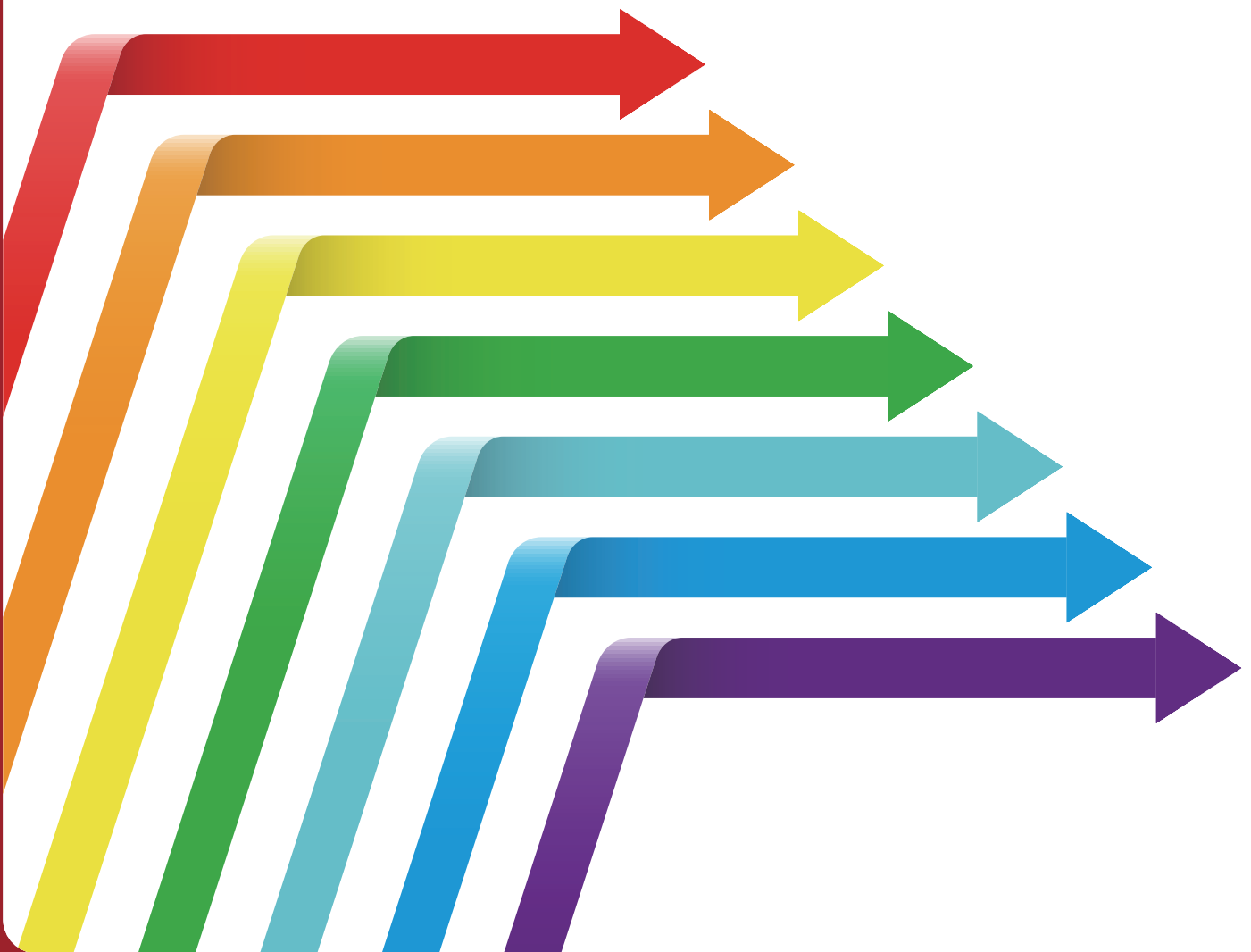


2023 NATIONAL LGBTQI MOVEMENT REPORT

**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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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
Gill Foundation
H. van Ameringen Foundation
Ineke Mushovic
Johnson Family Foundation
MacKenzie Scott
Ronald W. Naito MD Foundation
The Impact Project
The Palette Fund
Tzedek Social Justice Fund
Weston Milliken
Wild Geese Foundation
Zillow

Recommended citation: Movement Advancement Project. December 2023. *2023 National LGBTQI Movement Report: A Financial Overview of Leading Organizations in the LGBTQI Movement*. www.mapresearch.org/2023-national-lgbtqi-movement-report.

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Participating Organizations by Category	
Advocacy	
Equality Federation Equality Florida Equality North Carolina Equality Ohio Education Fund Family Equality Georgia Equality GLAAD Human Rights Campaign (HRC) interACT: Advocates for Intersex Youth	Keshet LGBTQ Victory Fund & Victory Institute National Center for Transgender Equality (NCTE) Outright International PFLAG SAGE: Advocacy & Services for LGBTQ+ Elders True Colors United URGE: Unite for Reproductive and Gender Equity
Issue	
CenterLink COLAGE Genders & Sexualities Alliance (GSA) Network The New York City Anti-Violence Project (NYCAVP) Point Foundation	Pony Barnes Foundation Reconciling Ministries Network (RMN) SIECUS: Sex Ed for Social Change Soulforce StartOut
Legal	
GLBTQ Legal Advocates and Defenders (GLAD) Lambda Legal	National Center for Lesbian Rights (NCLR) Transgender Law Center (TLC)
Research & Public Education	
Funders for LGBTQ Issues	Movement Advancement Project (MAP)

Note: One organization wishes to remain anonymous and is excluded from this list. See the Methodology infographic (page 4) 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.

This year, in particular, *The 2023 National LGBTQI Movement Report* is an important bellwether as some of the most significant economic COVID-19 impacts began to fade in 2022. Since the onset of the pandemic, MAP has conducted surveys of leading LGBTQI organizations regarding the impacts of COVID-19, including prior NMRs, but this year's report is one of the first full fiscal year glances at what may be the emerging new normal for LGBTQI movement organizations.¹

This year's report shows that participating organizations have strong financial standing despite increases in expenses, possibly related to organizations opening back up to in-person fundraising events, staff travel, and new hiring in 2022. It should be noted, however, that these financially-focused data do not necessarily reflect the many tremendous challenges facing many organizations and their staff, including impacts to staff mental and physical health in the wake of the pandemic and a challenging political climate for LGBTQ people.

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.

REVENUE: CONTINUED GROWTH AS COVID-19 RECEDES

- Across 34 participating organizations, **combined 2022 revenue** totaled \$308.3 million, exceeding combined 2022 expenses (\$274.2 million) by roughly \$34 million. For organizations with five-year longitudinal data available (n=26), the combined revenue exceeded expenses by \$30.3 million, a differential that is lower than the two preceding years, which may reflect a return to pre-COVID spending levels.
- From 2021 to 2022, organizations reported a **mix of increases and decreases across various sources of revenue**. These changes include significant combined increases in corporate contributions (86%), fundraising event income (60%), and in-kind contributions (52%). There were slight decreases in income from individual contributions (2%), foundation contributions (6%), and government funding (12%), along with a moderately more significant fall in bequests (20%). The rise in fundraising event income may reflect a return to in-person events as COVID-19 practices shifted. Relatedly the decline in government funding may be attributable to lesser public funding to sustain organizations through the initial years of COVID.
- Including in-kind revenue, these organizations reported a combined 2% **revenue increase from 2021 to 2022**. Excluding in-kind revenue, organizations' revenue decreased 2%. Notably, in-kind revenue alone increased by 52%.
- Organizations that provided five-year trend data reported an aggregate 35% **revenue increase from 2018 to 2022** (including in-kind).
- **Individual donations** remain the largest share of organizations' combined revenue, comprising 33% of total 2020 combined revenue.

¹ For additional research on the impact of COVID-19 on LGBTQI movement organizations, see MAP's ongoing research at www.mapresearch.org/covid-19.

EXPENSES: SIGNIFICANT GROWTH POST-COVID

- Total **combined 2022 expenses** were \$274 million. For organizations who provided five-year trend data, the majority of organizations' combined expenses (73%) were spent on programs and services.
- From **2021 to 2022, total expenses (including in-kind) increased 32%**. Excluding in-kind, participating organizations' expenses increased 34%.
- Organizations that provided five-year trend data reported an aggregate **36% expense increase (including in-kind) from 2021 to 2022**—with growth across programs and services, fundraising expenses, and management and general expenses. Growth in all areas may be an indication of increased in-person fundraisers in 2022, a return to travel costs for employees, and new hiring.

INDICATORS OF FINANCIAL HEALTH: STRONG LIQUIDITY DESPITE INCREASED DAILY EXPENSES AND A DIP IN WORKING CAPITAL

- 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, just over three quarters (76%) 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 longer-term strength and consistency (i.e., maintaining a strong liquidity ratio over the past five years) may help explain why LGBTQI organizations are maintaining financial health as expenses increase with a return to pre-pandemic normalcy.
- **Daily cash expenditures** increased from 2021 to 2022, with an average of \$17,300 in spending per day, an increase of 29%.
- Participating organizations reported an average of 381 days of **working capital** in 2022, a 23% decrease from the previous year.

FUNDRAISING: GROWTH IN DONORS ACROSS ALL DONATION SIZES FROM THE PRIOR YEAR

- In 2022, participating organizations reported a combined total of 430,801 **individual donors**, the vast majority of whom (94%) gave under \$1,000 in 2022. More than one in three (35%) of all individual donors in 2022 gave under \$35.
- Among organizations that provided five-year trend data (2018 to 2022), there were **fewer donations from large donors and micro donors**, however the two-year trend (2021-2022) shows an increase in the number of donors across all donation sizes.
- From fiscal years 2018 to 2022, the number of **large donors** (\$25,000+ per year) fell by 4%. From 2021 to 2022, however, the number of large donors increased by 4% —a reversal of the longer-term trend.
- From 2018 to 2022, the number of **medium donors** (\$1,000-\$24,999 per year) decreased by 7%, but from 2021 to 2022, the number of medium donors instead grew by 19%.
- From 2018 to 2022, the number of **small donors** (\$35-\$999 per year) increased by 1%. From 2021 to 2022, the number of small donors increased even further, by 9%.
- From 2018 to 2022, the number of **micro donors** (<\$35 per year) decreased 20%, but participating organizations reported a 15% increase in these donors from 2021 to 2022.
- 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, data reported by participating organizations suggest that only 3.8% of LGBT people—only about 1 in every 26 LGBT people—donated to these leading LGBTQI advocacy organizations in 2022. Of course, many non-LGBTQI people donate to these organizations, and some LGBTQI people likely donate to multiple organizations, so the true number of **LGBTQI 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 1,219 paid staff in fiscal year 2022, 92% of whom are full time workers. The **average staff size** at participating organizations is 29 staff, and the median staff size is 21. Staff size ranges from a low of one to a high of 255.
- Not all organizations reported staff demographics. Among those that did, organizations reported **racially** diverse staff, with 47% of all staff and 43% of all senior staff being people of color. Among all staff, 21% are Black or African American, 14% are Hispanic or Latino, 7% are Asian or Pacific Islander (API), 6% are multi-racial, 1% are Native American, and 2% identify as another race or ethnicity. A further 8% of staff ethnicities were reported as unknown. Compared to the national population, this means that LGBTQI organizations employ more Black and API and Native American people, but employ fewer Hispanic or Latino people.²
- Among reporting organizations, 49% of all staff identify as women, 33% as men, and 16% as nonbinary, genderqueer, or another **gender identity**. Looking just at senior staff, the share of men rises to 34%, and the share of nonbinary and genderqueer declines to 13% total.
- Among reporting organizations, 23% of staff and 25% of senior staff identify as transgender. Nationally, an estimated 0.5% of the adult population identifies as **transgender**.³
- The majority (62%) of all staff are **ages** 30 to 54, followed by 27% of staff under the age of 30, and 12% of staff who are 55 and older.

BOARDS: DEMOGRAPHICALLY DIVERSE, THOUGH LESS SO THAN STAFF

- Participating organizations reported a total of 681 board members, with an **average board size** of 20 members and a median of 16. The smallest board is comprised of 5 members, and the largest of 77.
- Boards are less **racially** diverse than staff, as only 41% of boards are people of color.⁴ In particular, board members are less likely than staff to be Hispanic or Latino, Native American, or multiracial. Only 10% of board members are Hispanic or Latinx (compared to 14% of staff), and only 0.2% of board members are Native American (compared to 1% of staff).
- Among board members, 44% identify as men, 47% as women, and 7% as nonbinary, genderqueer, or another **gender identity**.
- Overall, 10% board members identify as **transgender**.

² According to the 2020 Census, in 2020, people of color comprised 42.2% of the U.S. population. This includes 12.1% who were Black or African American alone, 18.7% were Hispanic or Latino, 6.1% were Asian or Pacific Islander alone, and 0.7% were Native American alone.

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

⁴ Though boards are less racially diverse than staff, the 41% of board members who are people of color falls just shy of the national average of 42%.

2023 NATIONAL LGBTQI MOVEMENT REPORT

A FINANCIAL OVERVIEW OF LEADING ORGANIZATIONS IN THE LGBTQI MOVEMENT



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 34 that chose to participate, most participating organizations (30) have budgets over \$1 million; four organizations have smaller budgets but are national or statewide 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.

34 PARTICIPANTS, TOTAL 2022 REVENUE = \$308.3M, TOTAL 2022 EXPENSES = \$274.2M

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

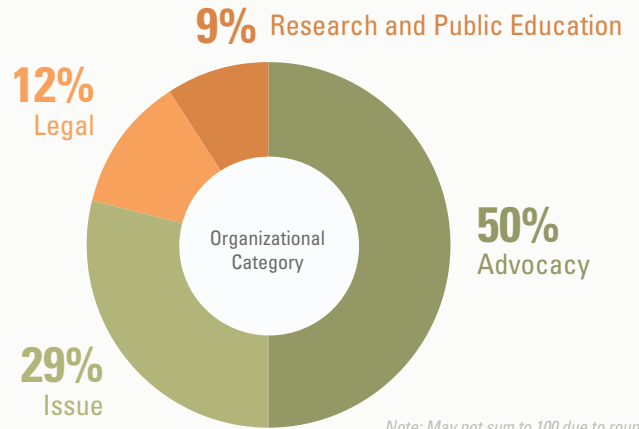
(n=34)

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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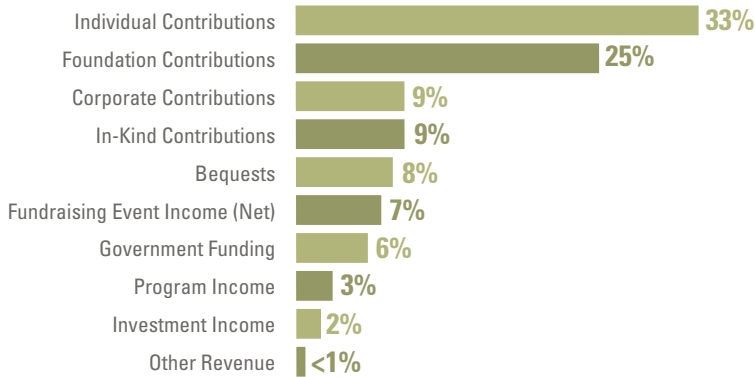
REVENUE AND EXPENSES

This section provides an overview of the revenue and expenses of leading organizations in the LGBTQI movement. For participating organizations, both revenue and expenses increased from fiscal years 2021 to 2022. 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.

34 PARTICIPANTS, TOTAL 2022 REVENUE = \$308.3M, TOTAL 2022 EXPENSES = \$274.2M

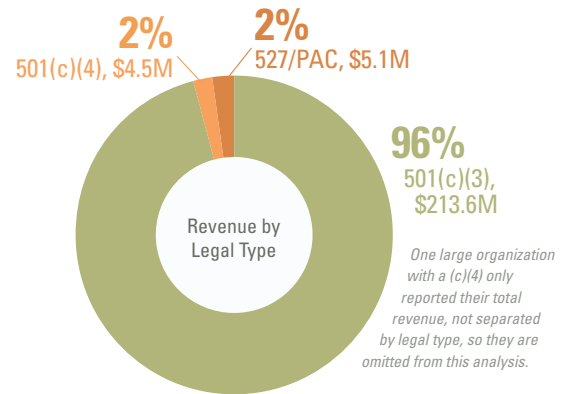
INDIVIDUAL CONTRIBUTIONS REMAIN TOP SOURCE OF REVENUE AMONG LGBTQI ORGANIZATIONS

2022 Revenue by Source (n=33)



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

2022 Revenue By Legal Type (n=33)



EXPENSES INCREASED, THOUGH PERCENT OF EXPENSES SPENT ON EACH CATEGORY REMAINED ROUGHLY CONSISTENT

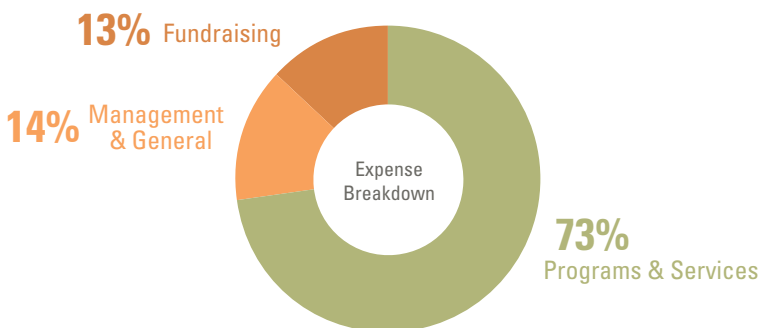
2021-2022 Expenses for Participating Orgs \$ Millions (n=25)

EXPENSES	2021	2022	% CHANGE
Programs & Services	\$134.4	\$174.1	+30%
Fundraising Expenses	\$23.0	\$30.6	+33%
Management & General Expenses	\$24.2	\$34.3	+42%
Total Expenses	\$181.5	\$239.0	+32%

* Note: Columns may not sum due to rounding.

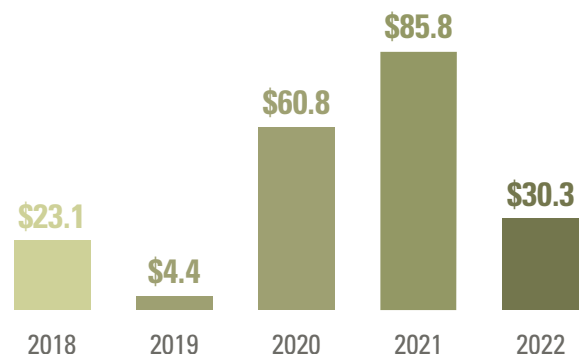
MAJORITY OF MOVEMENT EXPENSES SPENT ON PROGRAMS AND SERVICES

Combined 2022 Expenses (n=30)



2022 REVENUE EXCEEDED EXPENSES BY \$30.3 MILLION

Yearly Difference in Revenue and Expenses, 2018-2022, in Millions (n=26)



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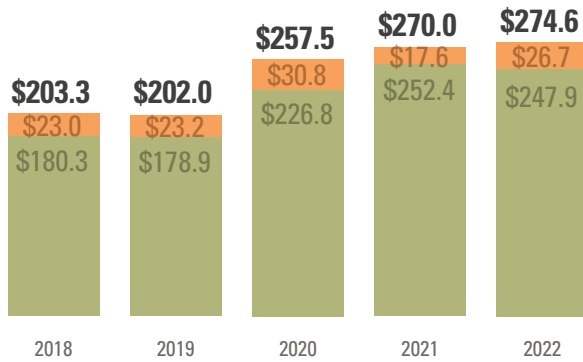
FINANCIAL TRENDS

This graphic examines the financial capacity of LGBTQI movement organizations from 2018 through 2022. At the end of the 2022 fiscal year, participating organizations as a whole remain well-resourced and supported by a diverse range of revenue sources. 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.

26 PARTICIPANTS, TOTAL 2022 REVENUE = \$274.6M, TOTAL 2022 EXPENSES = \$244.4M

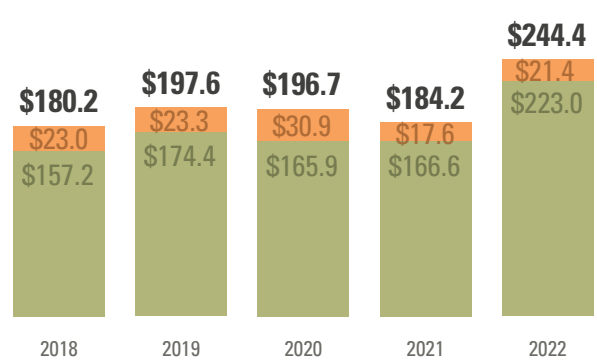
COMBINED REVENUE INCREASED 35% FROM 2018 TO 2022

2018-2022 Revenue by Source, in Millions (n=26)



COMBINED EXPENSES INCREASED 36% FROM 2018 TO 2022

2018-2022 Expenses by Source, in Millions (n=26)

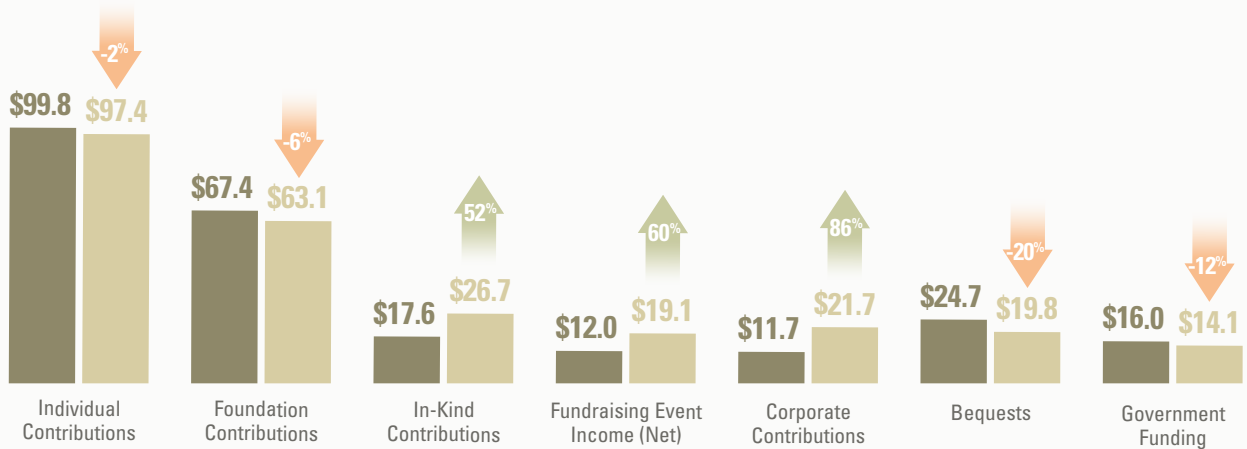


■ Minus In-Kind Expenses/Revenue ■ In-Kind Expenses/Revenue

2022 SAW SUBSTANTIAL INCREASES AND SLIGHT DECREASES IN DIFFERENT SOURCES OF REVENUE

2021-2022 Revenue Change by Source in Millions (n=26)

■ 2021 ■ 2022



COMBINED REVENUE INCREASED 2% FROM 2021 TO 2022

2021-2022 Total Revenue Change in Millions (n=26)

■ 2021 ■ 2022



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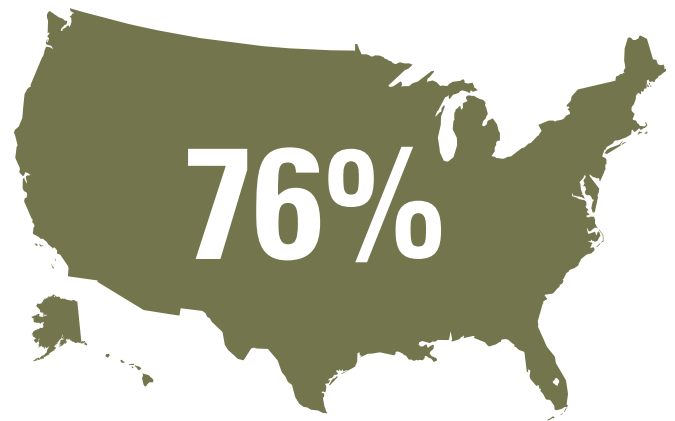
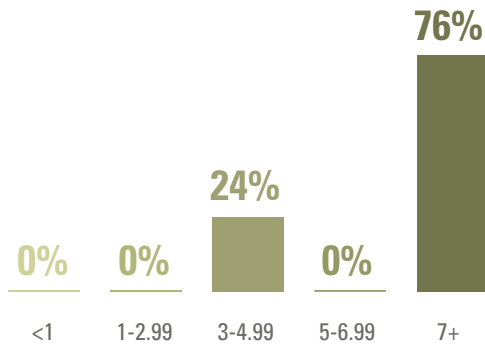


INDICATORS OF FINANCIAL HEALTH

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 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.

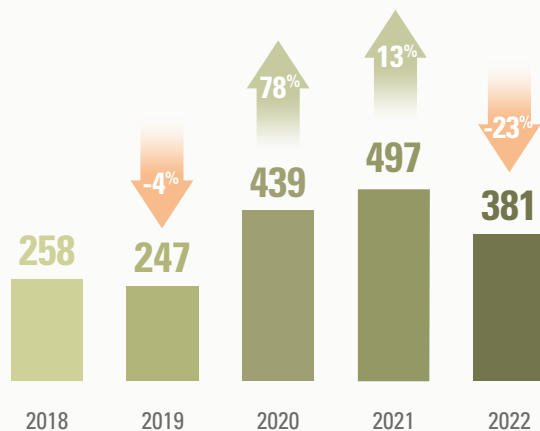
ROUGHLY THREE QUARTERS OF ORGANIZATIONS HAVE A 5-YEAR AVERAGE LIQUIDITY RATIO OVER 7

Percent of Organizations (n=25) by 2018-2022 Average Liquidity Ratio



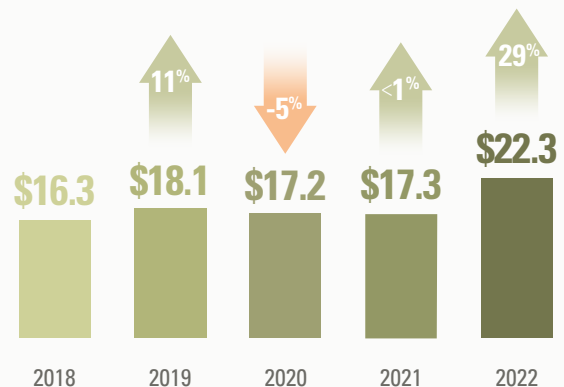
DAYS OF WORKING CAPITAL DECREASED 23% FROM 2021 TO 2022

2018-2022 Average Days of Working Capital (n=25)



DAILY CASH EXPENDITURES INCREASED 29% FROM 2021 TO 2022

2018-2022 Cumulative Average Daily Cash Expense, in Thousands (n=26)



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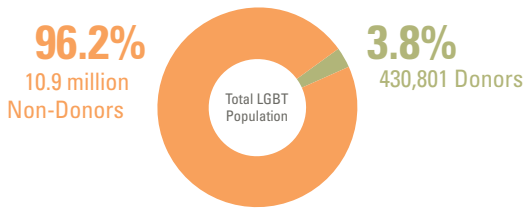
FUNDRAISING AND FUNDRAISING EFFICIENCY

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

34 PARTICIPANTS, TOTAL 2022 REVENUE = \$308.3M, TOTAL 2022 EXPENSES = \$274.2M

3.8% OF LGBTQ POPULATION CONTRIBUTES TO PARTICIPATING ORGANIZATIONS

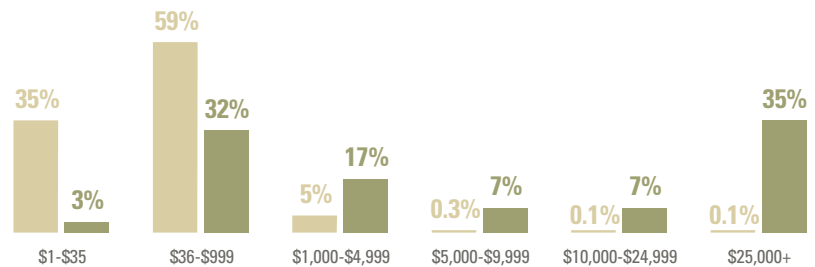
Combined Donors Giving Any Amount vs. Total Adult LGBTQ Population (n=30)



Source: Williams Institute using Gallup estimates (2020).
Note: Assumes all donors are LGBTQ. Likely percent of LGBTQ non-donors even higher.

DONORS GIVING UNDER \$1,000 COMPRISE THE MAJORITY OF DONORS, AND THEY RAISED ROUGHLY THE SAME AMOUNT AS DONORS GIVING OVER \$25,000

Percent of individual donors and donation revenue, by donation size ranges (n=30)



CONTACTABLE NAMES VARY GREATLY (n=25)

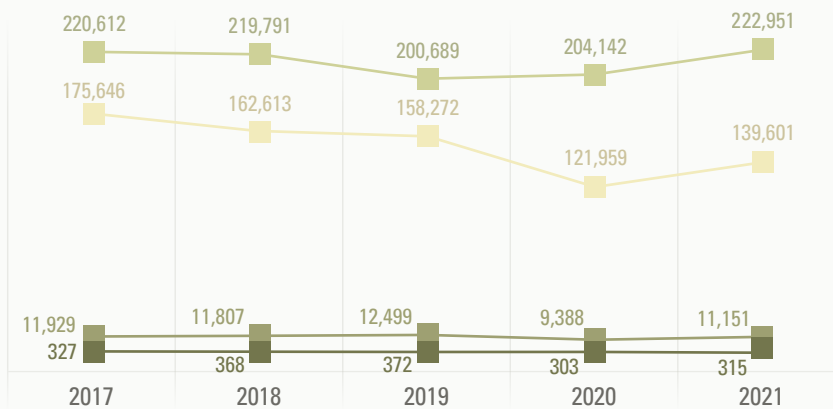


Example: Across all responding organizations, 59% of all individual donors in 2022 gave \$36-\$999, and those donations comprised 32% of these organizations' revenue from individual donors.

AMONG REPORTING ORGS, INCREASES IN NUMBER OF INDIVIDUAL DONORS

2018-2022 Number of Donors (n=20)

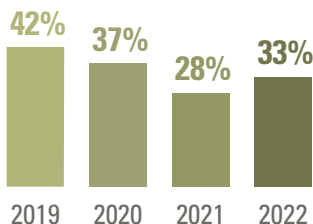
- Micro (< \$35)
- Small (\$35-\$999)
- Medium (\$1,000-\$24,999)
- Large (\$25,000+)



- #### 2021-2022 % Change
- ▲ 9% Small
 - ▲ 15% Micro
 - ▲ 19% Medium
 - ▲ 4% Large

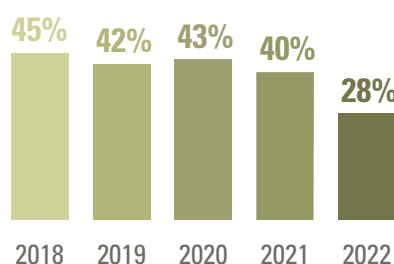
SHARE OF NEW DONORS INCREASED

2019-2022 Percent of Donors That Are First-Time Donors (n=18)



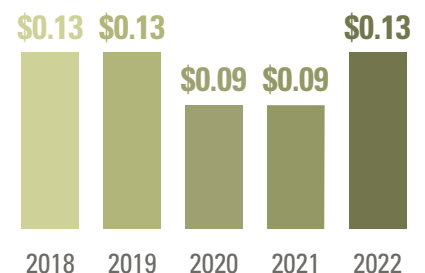
CONTRIBUTIONS FROM TOP 10 DONORS FELL IN 2022

2018-2022 Percent of Revenue from Top Ten Contributors (n=21)



ORGANIZATIONS' AVERAGE COST TO FUNDRAISE RETURNED TO PRE-COVID LEVELS

2018-2022 Average Cost to Raise \$1 (n=26)



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

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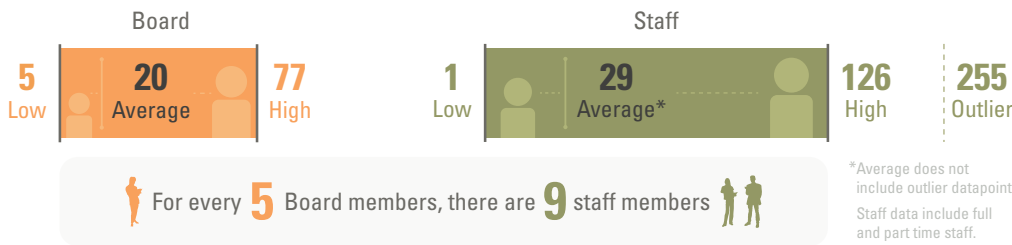
STAFF AND BOARDS

This section examines the staff and boards of participating organizations. Organizations were asked about staff and board size, staff compensation, as well as staff and board demographics, including age, gender identity, identification as transgender, 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=34): 1,219 TOTAL STAFF (1,119 FULL TIME; 100 PART TIME) & 681 BOARD MEMBERS

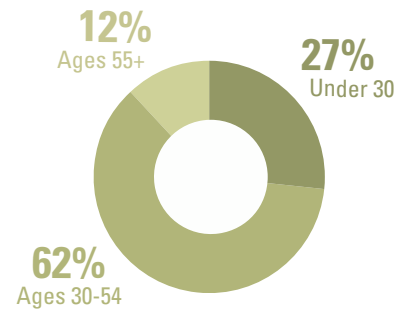
STAFF AND BOARD SIZE VARY

(n=34)



MAJORITY OF STAFF ARE AGES 30-54

(n=33)

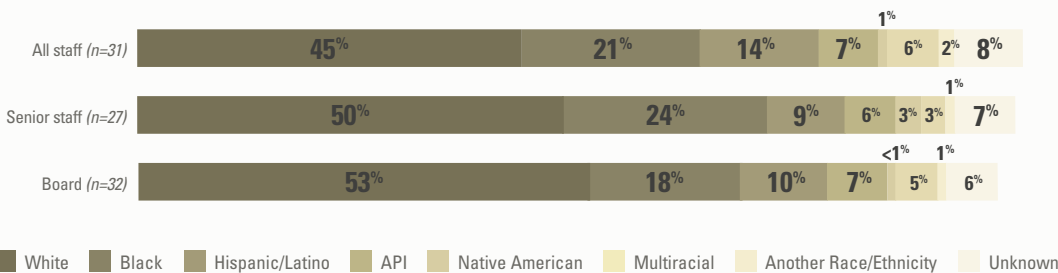


WIDE AVERAGE SALARY RANGE FOR SENIOR STAFF

Average Senior Staff Compensation (n=32)

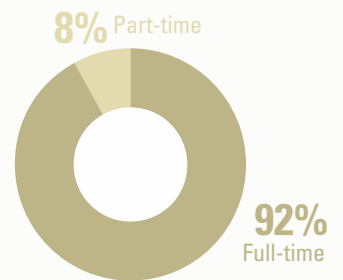


RACE/ETHNICITY OF STAFF AND BOARD

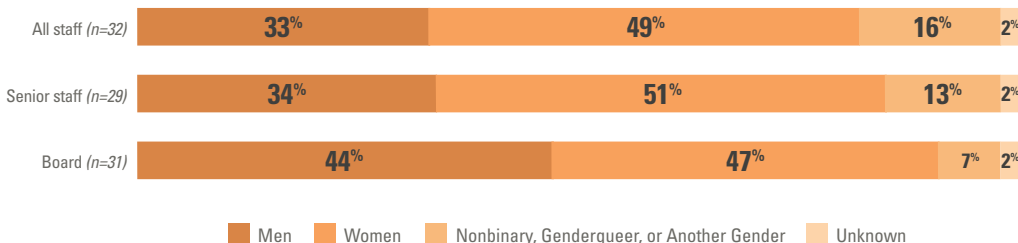


ONE IN 12 STAFF ARE PART-TIME WORKERS

(n=34)

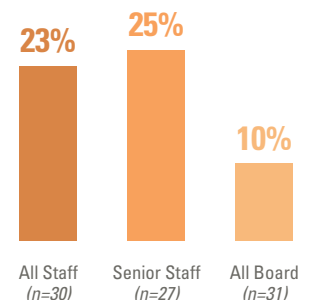


GENDER IDENTITY OF STAFF AND BOARD



TRANSGENDER STATUS OF STAFF AND BOARD

% of staff/board that is transgender



ABOUT THIS REPORT

The National LGBTQI Movement Report, published annually by MAP, examines revenue and expenses, fundraising and fundraising efficiency, and other indicators of financial health for lesbian, gay, bisexual, and transgender, queer, and intersex (LGBTQI) advocacy, issue, legal, and research and public education organizations.



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