

# COVID & THE LGBTQI MOVEMENT IN 2021: RESULTS FROM THE Q1 2021 COVID PULSE SURVEY

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**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 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. For more information, visit [www.lgbtmap.org](http://www.lgbtmap.org).

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This report is part of a series assessing the impacts of COVID-19 on major organizations in the LGBTQI movement. To see previous reports in the series, please visit [www.lgbtmap.org/covid-19](http://www.lgbtmap.org/covid-19). For additional research on the overall capacity of the LGBTQI movement, please visit [www.lgbtmap.org/lgbt-advocacy-organizations](http://www.lgbtmap.org/lgbt-advocacy-organizations).

## INTRODUCTION

For more than a year, LGBTQI and allied movement organizations have navigated the uncertainty of the COVID-19 pandemic. For many organizations, this has meant shifting operations to a virtual format, offering programs online, and identifying and obtaining pandemic financial relief, all while continuing to serve LGBTQI people and advocating on their behalf.

Since 2006, the Movement Advancement Project (MAP) has conducted surveys of organizational capacity within the LGBTQI movement. These surveys have helped organizations identify opportunities and learn from one another, grounded funders in responding during times of need, and engaged individual donors more deeply in giving to the movement.

During the COVID-19 pandemic, MAP has frequently surveyed organizations. Reports released in [September 2020](#) and [January 2021](#) revealed the flexibility, creativity, and ultimately the continued resilience of LGBTQI and allied organizations during 2020. Throughout 2021, MAP is continuing to survey organizations. This report presents the results from our first quarterly pulse survey of 2021, summarizing organizations' experiences in 2020 and offering a first look at how organizations are doing in early 2021.

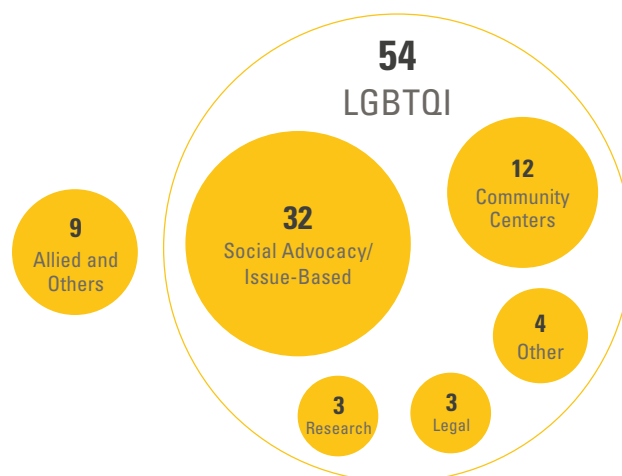
## PARTICIPANTS

In total, 63 organizations participated in the survey, which was distributed in mid-April 2021. As shown in [Figure 1](#), the majority of participating organizations are LGBTQI-focused organizations focused on social or issue-based advocacy.

Most organizations work nationally and/or at the state level, though some organizations report doing international work, working regionally across several states, or serving cities or counties.

*"Although we are not able to reach our regular audience, some of our virtual programming is reaching community members that are not in our geographical area, which is a positive."*

**Figure 1: Majority of Participating Organizations are LGBTQI**  
n=63



## 2020 IN REVIEW

Organizations were asked to reflect on the entirety of 2020.

### Nearly All Organizations Reported a Negative Impact on Operations and Their Ability to Deliver Programs and Services

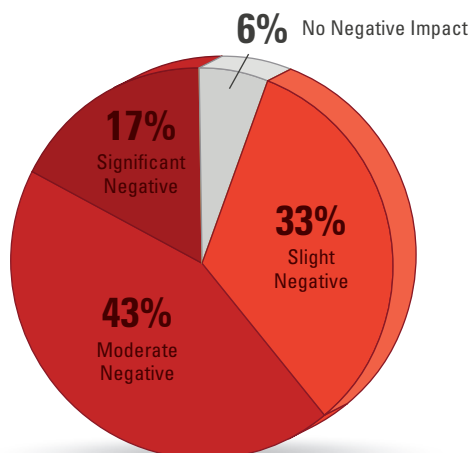
Not surprisingly, nearly all organizations (94%) said that their ability to operate and deliver programs and services was negatively impacted by the pandemic. More than half of organizations experienced moderate or significant negative impacts, as shown in [Figure 2a](#) on the next page. Notably, however, one in three organizations indicated that the negative impact was minimal.

When asked about the single worst impact of the pandemic on their organizations, two in five organizations (41%) cited the impact on staff mental health, while 29% indicated a negative impact on their ability to deliver programs, services, and meet other objectives. Other organizations noted challenges with fundraising and revenue (16%), the shift to working remotely (11%), and cash flow (2%).

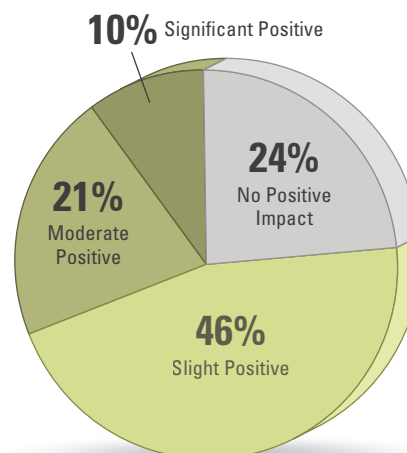
At the same time, 31% of organizations indicated that the pandemic moderately or significantly positively impacted their organizations' ability to operate and deliver programs and services, while another 46% said that the pandemic had a slight positive impact. One quarter of organizations said the pandemic had no positive impact, as shown in [Figure 2b](#) on the next page. Most organizations reported a mixed experience during pandemic with both positive and negative impacts on their organizations. For example, only two organizations reported significant negative impact and *no* positive impact. The most frequent combination (reported by 15 organizations) was to have experienced both a moderate negative impact and a slight positive impact.

## Figure 2: Organizations Report Both Negative and Positive Impacts of the Pandemic on Operations & Program and Services

**Figure 2a:** Most Organizations Report Negative Impacts  
(n=63)



**Figure 2b:** Three-Quarters of Organizations Report Some Positive Impacts  
(n=63)



Note: May not sum to 100 due to rounding.

*"The main negative impact was the psychological and social impact on individual employees and volunteers. In some ways, our capacity decreased as we offered employees a period of unlimited time off to manage the effects of the pandemic. We also cut staffing to ride out financial uncertainty in the middle of the year."*

*"While we were not able to hold any trainings, internships, or fellowship programs in-person, offering these in a virtual capacity allowed for a broader range of participants who might not have been able to attend a physical event."*

Organizations were asked to name a "single best" positive impact as a result of the pandemic. The most frequently cited positive impact was the shift to working remotely, mentioned by 38% of organizations. Other impacts mentioned included positive fundraising and revenue (13%), positive cashflow (13%), and the ability to deliver programs, services, and other objectives (13%). Notably, one in four organizations said there had been no positives.

### Half of Organizations Ended 2020 With Higher Revenue Than Anticipated Before the Pandemic

Remarkably, 55% of organizations ended 2020 with higher revenue than they had anticipated prior to the start of the pandemic in January 2020 or at the beginning of their 2020 fiscal year. That said, a sizeable minority (35%) experienced drops in revenue over the course of the year. Comparing net income from their original 2020 budgets to the end of 2020, 71% of all organizations had higher net income, while 21% experienced lower net income than anticipated.

Nearly all organizations applied for, and received, federal Paycheck Protection Program (PPP) loans or other forms of pandemic relief funding. Three in five organizations (63%) indicated that the PPP forgivable loans or other relief resources were either critically or very important for their organizations' financial performance in 2020. Of these organizations for whom the PPP or other pandemic relief were critically or very important, 26% had no dedicated cash reserve and another 19% had fewer than three months of operating expenses in reserves.

Remarkably, only five organizations utilized their cash reserves in 2020 as a result of the pandemic.

As shown in **Figure 3** on the following page, across key revenue sources, organizations reported mixed experiences. For example 90% of organizations reported lower than expected revenue from events, yet only 16% had lower foundation funding than originally anticipated. Organizations were nearly evenly split in their individual giving results comparing pre-pandemic expectations for 2020 to year-end results; 42% reported higher individual giving than anticipated, while 40% reported lower individual giving.

### Four out of Five Organizations Ended 2020 With Lower Expenses Than Anticipated Before the Pandemic

A small number of organizations reported higher expenses than had been previously budgeted, while the vast majority (83%) indicated their expenses for 2020 had been lower than anticipated at the beginning of January 2020.

Figure 3: Organizations Reported Mixed Experiences Among Key Revenue Sources in 2020 Compared to Original 2020 Projections

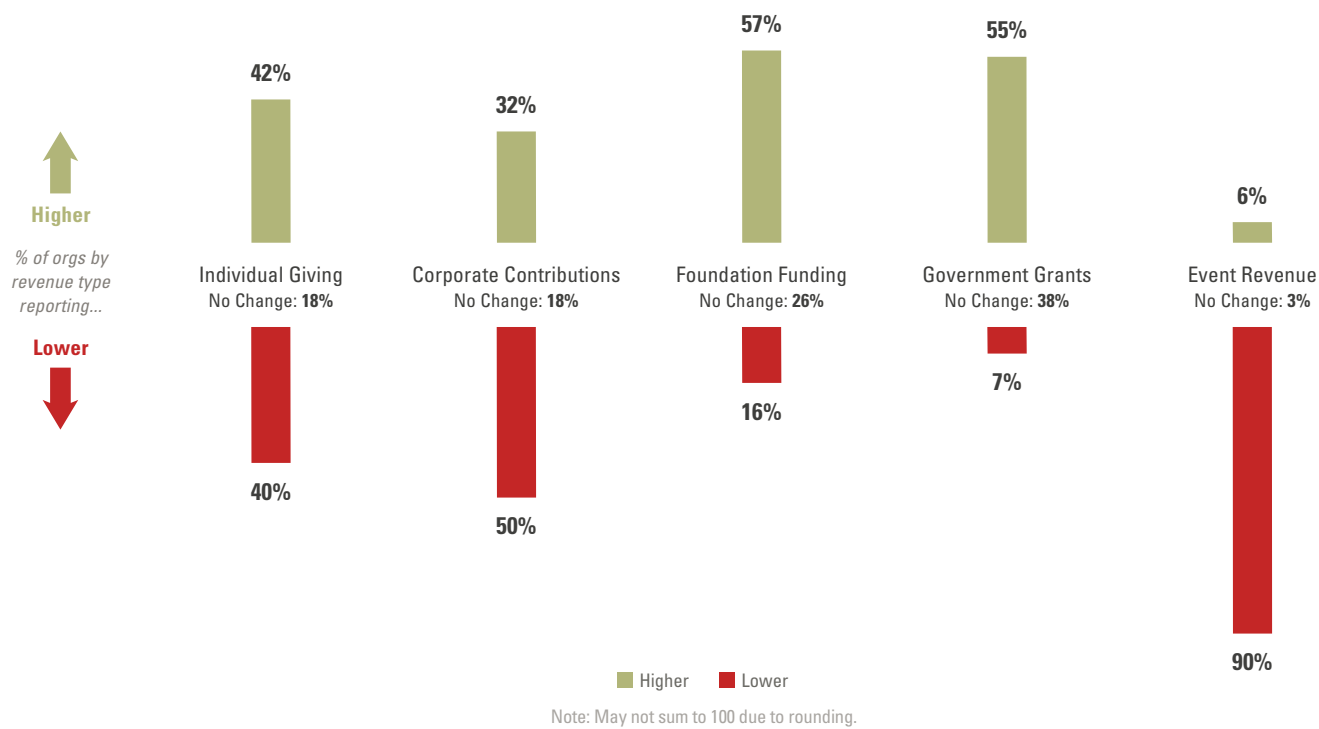
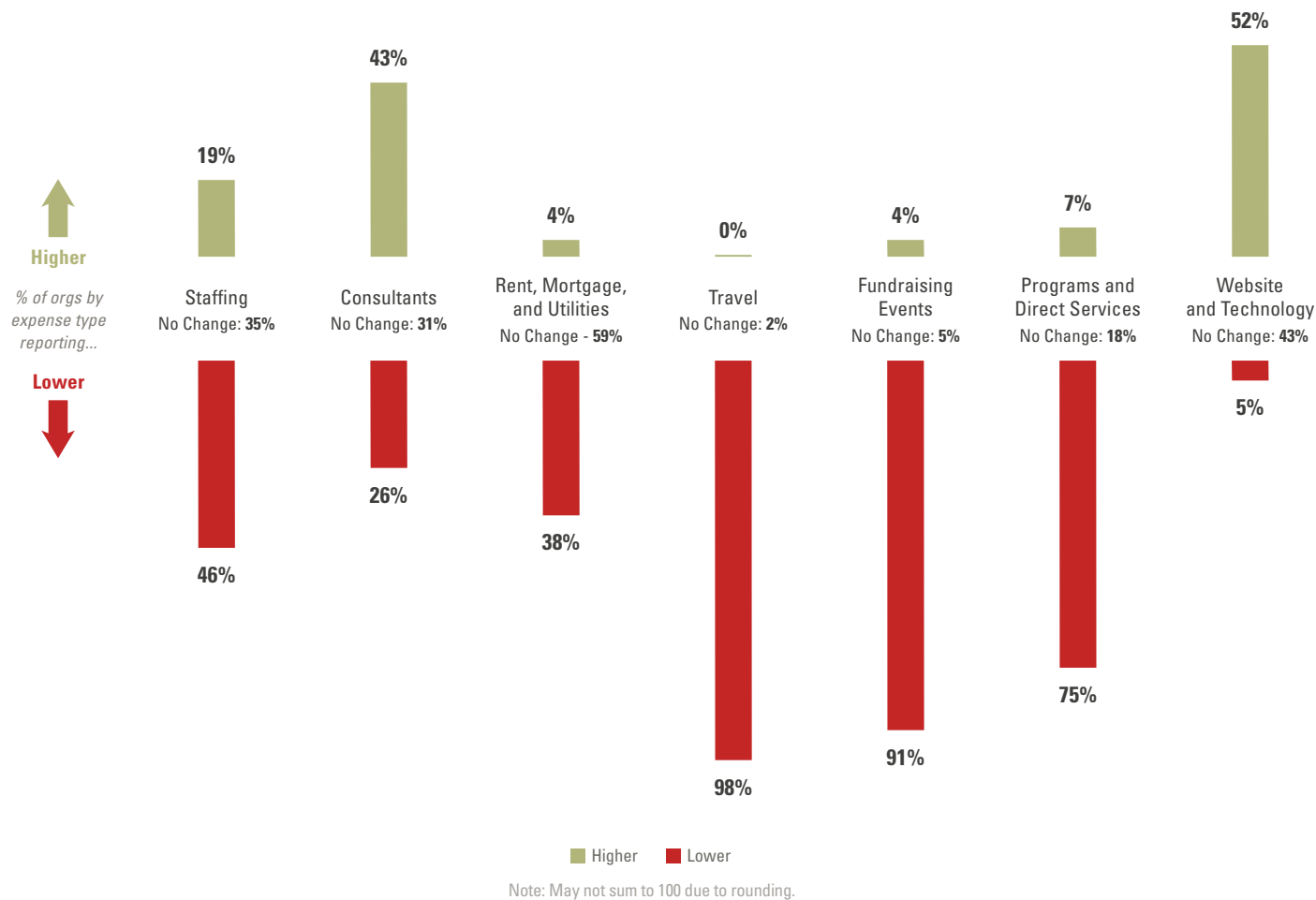


Figure 4: Many Organizations Had Lower Expenses in 2020 Compared to Original 2020 Projections



Across the various types of expenses, many organizations reported declines, as shown in **Figure 4** on the previous page. Not surprisingly, 98% of organizations had lower travel expenses than originally anticipated for 2020, though 43% reported spending more than expected on consultants during 2020.

*“We are eager to return to normal operations as our audience is burned out on virtual format events, and our relationships to supporters, particularly donors, have been diminished, particularly in demographics that are not as tech friendly.”*

## Organizations Reported Reduced Staffing Costs, But Did Not Drastically Cut Staffing Levels

As noted above in Figure 4, 46% of organizations reported reductions in staff expenses. Yet when asked what changes in staffing were made, the majority of organizations did not report drastic, purposeful cuts to staffing. Among the most cited staffing changes as a result of the pandemic, organizations mentioned voluntary departures (21 organizations), adding new staff positions (16 organizations), and making no changes as a result of the pandemic (16 organizations). Fewer organizations mentioned increasing staff benefits (11 organizations), eliminating staff positions, or temporary layoffs (nine organizations mentioned each of these).

*“We managed to change our service delivery model quickly, and it showed us what was possible. We also ended up saving a lot of money because of COVID restrictions, i.e., travel; and our fundraising was strong. So, we ended up with a significant operating surplus.”*

*“We saved rent by closing our office. We decided to hire some positions elsewhere in the country, diversifying our talent pool.”*

## EXPECTATIONS FOR 2021

This survey was conducted at the end of the first quarter of 2021. As such, organizations were asked about their expectations for 2021 on the whole.

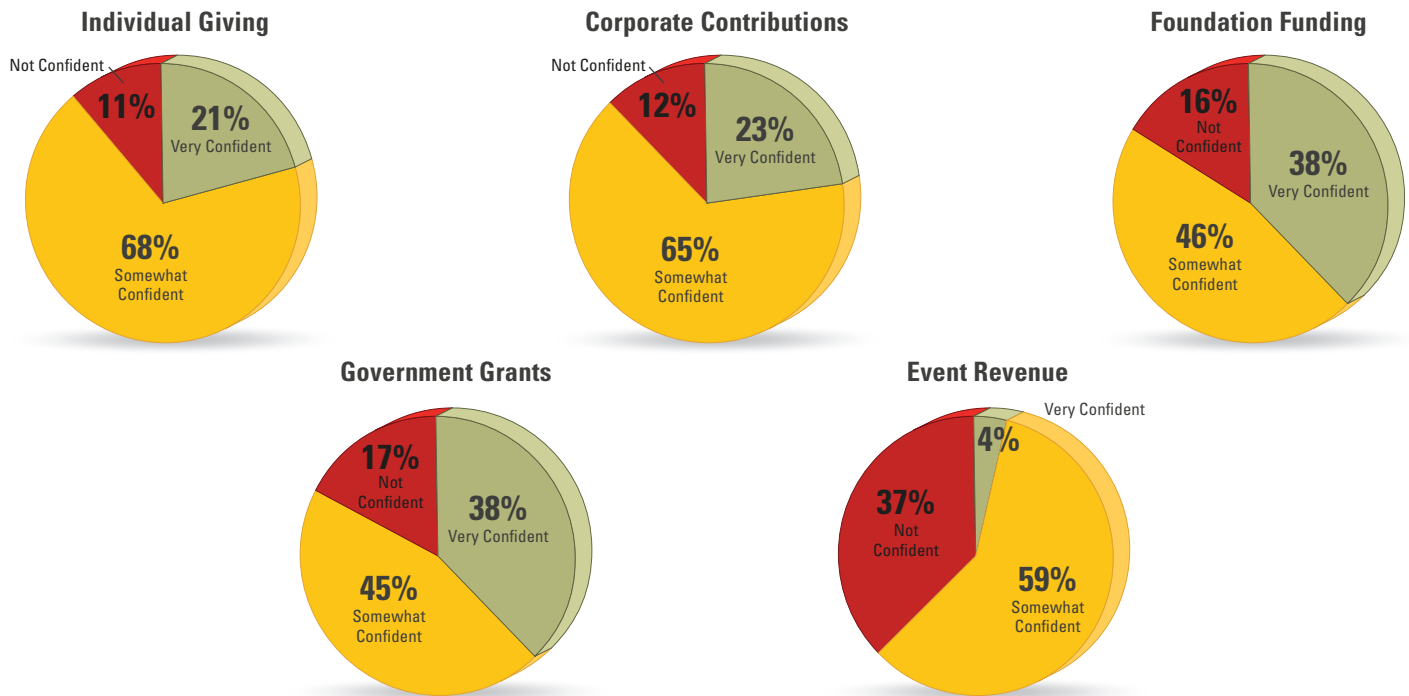
### Expectations for Revenue in 2021

Overall, organizations are confident and optimistic about various revenue streams in 2021, as shown in **Figure 5** on the following page. Though given the continued impact of the pandemic on the ability to hold in-person events, organizations are the least confident about revenue from events; more than one in three report feeling not confident about this source of revenue.

### Expected Pandemic Relief Funding in 2021

Far fewer organizations have applied for the second round of the federal Paycheck Protection Program (PPP) funding; 30% of organizations reported that they have or will be applying for this second round of assistance, receiving on average \$357,000. Though the eligibility requirements are different from the first round, and only organizations that experienced at least a 25% decline in any quarter in 2020 compared to 2019 are eligible, and given the relative resilience of participating organizations, far fewer organizations are eligible.

**Figure 5: Organizations Are Feeling Confident Overall About Revenue for 2021**



## CONCLUSION

On the balance, organizations report that they weathered 2020 fairly well. They responded by shifting to virtual programs and events, holding onto staff, and cutting expenses for travel and fundraising events. Based on their experiences in the first quarter of 2021, organizations are hopeful that revenues will increase, and they will be able to return to more in-person programs. Organizations are now facing decisions about how and when to reopen safely both for staff and the public and the related complexities of those decisions, including whether staff are vaccinated and feel safe returning to work, the availability of childcare, and the broader level of comfort among the populations they serve.

The impact of the pandemic has shown that, as a collective force, the movement is resilient. The strength of the movement was demonstrated in organizations' collective ability to pivot and shift gears to keep moving forward and to stay mission-oriented. That said, when looking at organizations individually or in smaller groups, there are some disparities in financial strength. In particular, had it not been for federal relief resources, the impact would have potentially been much more devastating. As organizations move through 2021, it is important to keep in mind the impact of financial resources that allow organizations to be flexible and responsive as things change.

## ABOUT THIS REPORT

This report examines the impact of COVID-19 on LGBTQI and allied organizations and is part of a broader series of reports available at <https://www.lgbtmap.org/covid-19>. Additional research focused on the LGBTQI movement's capacity overall is available at <https://www.lgbtmap.org/lgbt-advocacy-organizations>.



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