

COVID & THE LGBTQI MOVEMENT IN 2022 AND 2023: RESULTS FROM THE SPRING 2023 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.

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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. For additional research on the overall capacity of the LGBTQI movement, please visit www.lgbtmap.org/lgbt-advocacy-organizations.

INTRODUCTION

In the years since the COVID-19 pandemic began, organizations working in the service of LGBTQI people have had to adapt quickly to weather the upheaval affecting all sectors. Though 2022 saw some return to normalcy, organizations still had to account for remote employment and occupancy costs, inflation, and ramping up areas of their work, such as travel, that were previously tabled or lessened. Looking ahead at 2023, LGBTQI organizations are not only continuing to return to the new “normal,” but are also making crucial decisions about growth and financial stability. These decisions are sure to be affected by the critical advocacy, litigation, messaging, and community support work of movement organizations pushing back against the unprecedented onslaught of anti-LGBTQI policies introduced and enacted in 2023. As a result, while the threat of COVID has lessened, the climate for movement work is nevertheless challenging.

This report is part of a series of reports, released by the Movement Advancement Project (MAP) since 2020, focused on how COVID-19 has impacted LGBTQI movement organizations. This entry in the series provides the findings from the March-April 2023 Pulse Survey. In it, organizations shared their experiences in 2022 and their current activities and plans for 2023. The report builds on 17 years of MAP research about the health and needs of the movement, illuminating valuable insights to LGBTQI organizations, funders, and individual donors.

The findings in this report indicate that movement organizations are largely recovering from the effects of COVID, with many of the participants reporting that their experiences raising revenue and budgeting for expenses met their expectations last year, though there were exceptions. Another positive indicator is the large proportion of organizations reporting that they are operating at a higher capacity than before the pandemic. Almost all participants are focusing on hiring more staff, and most organizations have also adapted to working remotely, or with a hybrid of in-office and remote work. As the pandemic appears to wane, movement organizations have opportunity for stabilization and growth.

PARTICIPANTS

In total, 39 organizations participated in the Spring 2023 survey, which was conducted in March and April 2023. Most organizations (90%) that participated were LGBTQI organizations, and the remaining 10% were allied or other organizations as shown in **Figure 1**. They included social advocacy organizations (21 out of 39, or 54%), legal groups (4 out of 39, or 10%), research organizations (2 out of 39, or 5%), and community centers (12 out of 39, or 31%).

Most organizations had 2023 budgets of \$1 million or more, and over three quarters had budgets between \$1 million and \$10 million, as shown in **Figure 2**.

Figure 1: Majority of Participating Organizations are LGBTQI

n=39

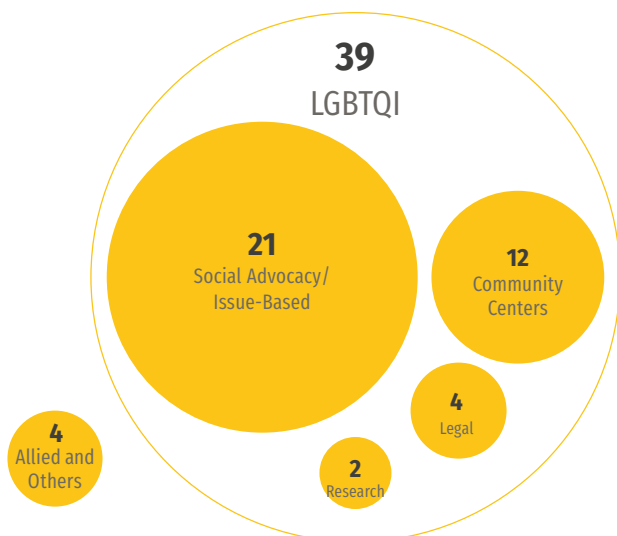
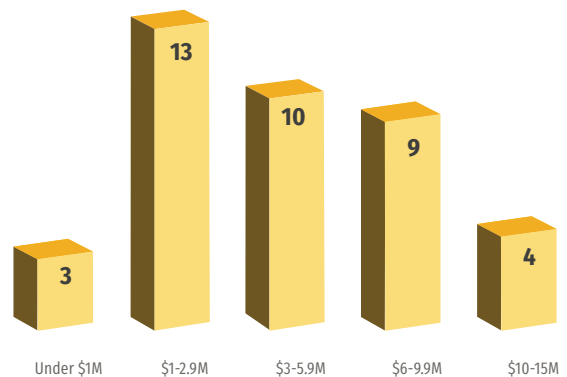


Figure 2: Majority of Organizations' 2023 Budgets Were Over \$1M

n=39



COVID Relief. As the pandemic waned, few participating organizations sought COVID funding relief in 2022, such as employer payroll tax credits. The overwhelming majority (87%) did not pursue COVID relief funds. It should be noted, however, that in 2022 there were not as many COVID relief funding streams available to organizations as had previously been the case. Further, some of the existing COVID relief was subject to narrower eligibility criteria than in prior years. This context may have impacted organizations' eligibility for or decisions to seek COVID relief.

Year-End Revenue Compared to Expectations in 2022.

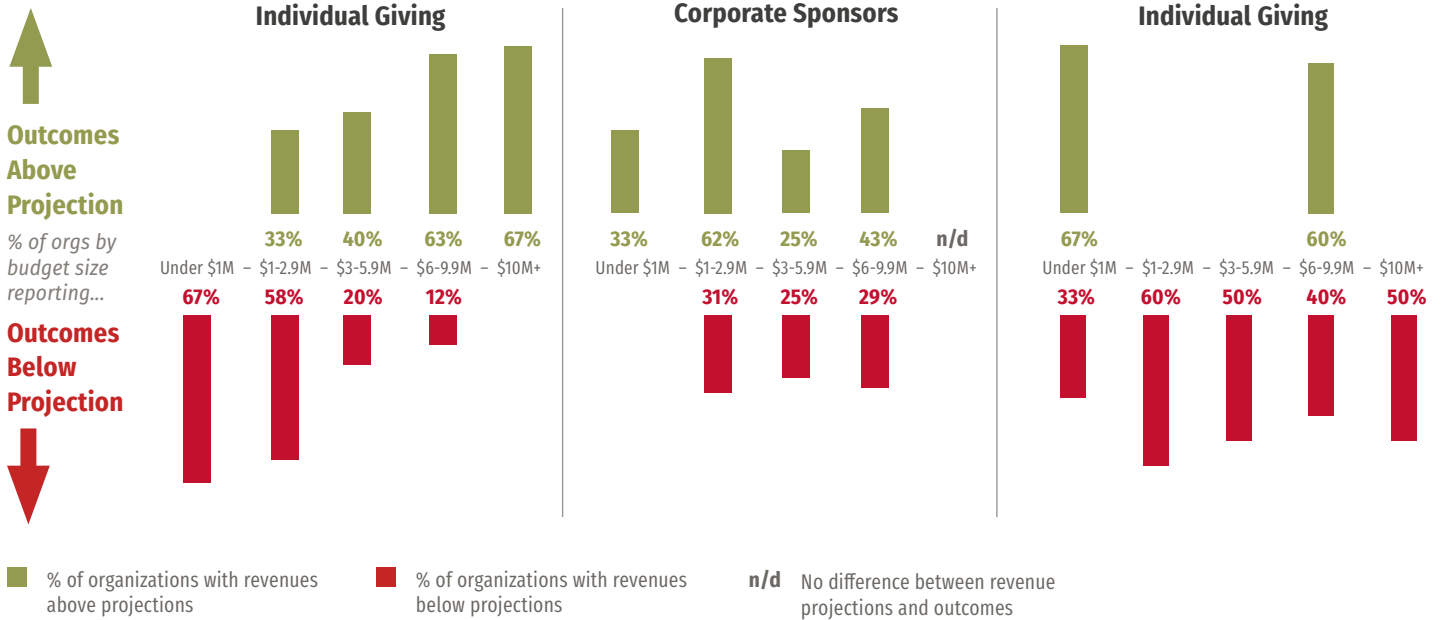
Participants were asked about their 2022 actual revenue as compared to their operating budgets in the following areas: individual giving, corporate sponsors, foundation income, government funding, events, earned income, and investments. Among these revenue sources, the overall trends below emerged in 2022, with most organizations earning revenues at or above the levels they had anticipated outside of event revenues. Detailed trends by organization budget size are shown in *Figure 3*.

- **Individual Giving:** Organizations were nearly evenly split among revenue expectations either meeting, exceeding, or falling below their expectations. A plurality of organizations (39%) had slightly or significantly higher income from individual giving in 2022 than they expected, while nearly one third (32%) reported lower individual giving revenue than expected. Finally, a little more than a quarter (29%) reported that their revenue from individual giving was about as expected.
- **Corporate Sponsors:** Among organizations with corporate contributions to report (n=35), 40% received higher corporate contributions than expected, 23% received lower contributions than expected, and 37% received about as much as expected in corporate funds.
- **Foundation Income:** Among organizations with income from foundations (n=37), more than half (53%) received more foundation funding than expected. Less than a quarter of the organizations (14%) received less foundation income than expected and one third (33%) had about as much foundation funding as they had budgeted for.
- **Government Funding:** Of respondents who received government funding (n=22), the majority (69%) received the level of funding that they expected, while nearly a quarter (23%) received more than expected, and only two (9%) received less than expected.
- **Event Revenue:** Those organizations planning for income from events (n=26) mostly made lower event revenues than expected (54%). Of the remainder, over a third (35%) made about what they expected, and less than a fifth (19%) had more event revenue than expected.
- **Earned Income:** For those organizations that planned for earned income (n=26), 38% earned more revenue than expected, 27% earned less than expected, and 35% made about as much as their budget projected.
- **Investments:** Few organizations expected revenue from investments (n=7), and of these, most (57%) received more investment income than expected, and the remainder (43%) made about what they had anticipated when budgeting.

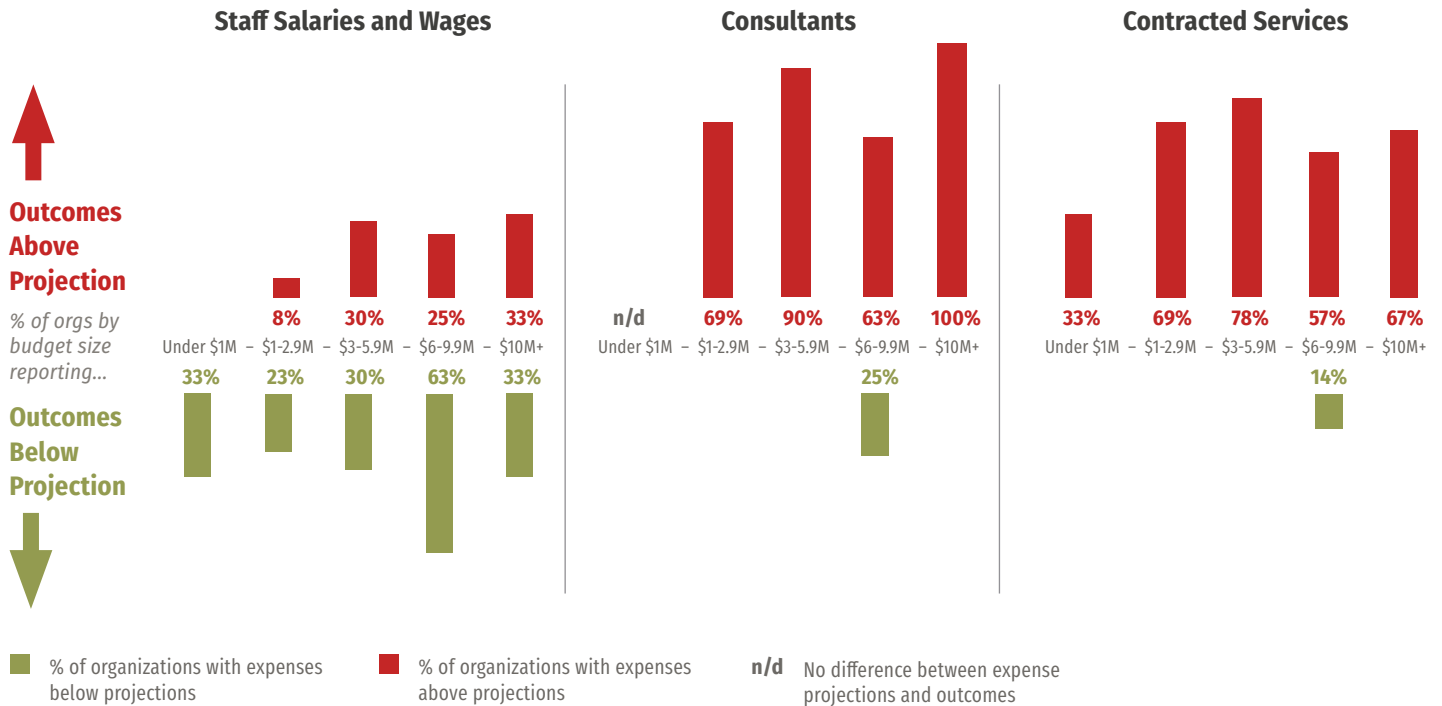
Figure 3: COVID's Financial Impacts on Revenue and Expenses Varied by Organizations' Budget Size

Percent of Organizations, by Budget Size, Reporting Revenue, and Expense Outcomes Compared to Budget Projections During 2022

Revenue Outcomes Compared to Projections in 2022



Expense Outcomes Compared to Projections in 2022



Note: Organizations could also report that their revenue and expense outcomes were about the same as projected in their budgets. This figure only shows those that reported exceeding or falling below budget projections; therefore percentages shown here may not sum to 100.

Year-End Expenses Compared to Expectations in 2022

Participating organizations were also asked in detail about their 2022 actual expenses as compared to what they had projected in their budgets. The following are the overall 2022 expenditure trends, which showed that in most expenditure areas, at least a plurality of participants had expenses that matched their expectations or were lower than anticipated. The few exceptions were the cost of web and technology infrastructure, contracted services, and consultant services, with those most notable trends further explored by organization budget size in *Figure 3*.

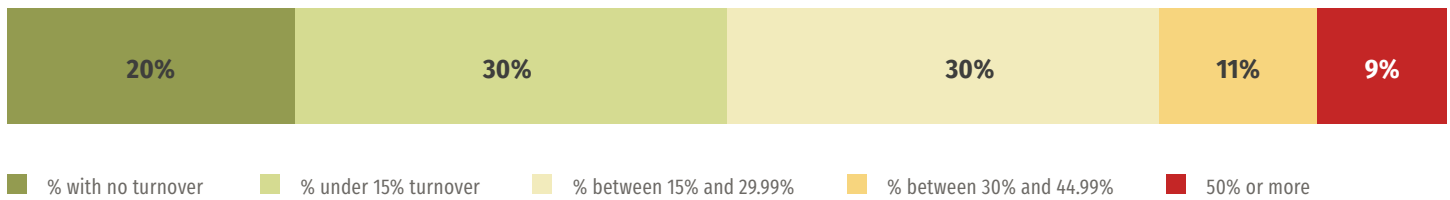
- **Staffing – Salaries and Wages:** All but one organization, which was entirely volunteer-based, reported expenses for salaries and wages (n=37). Of these, 19% had higher expenses than expected, 38% had lower expenses than expected, and 43% had salary and wage expenses that were about as much as they had expected.
- **Staffing – Benefits:** Regarding benefits, of the organizations with paid staff (n=37), nearly half (46%) had about the level of expenses they expected. For the remainder, nearly a fifth (19%) had higher benefits costs than expected and almost a third (32%) had lower costs than expected.
- **Occupancy (e.g. rent, mortgage, utilities):** Of the organizations that had occupancy costs (n=33), 67% paid about as much as budgeted, while 15% spent more than budgeted and 18% spent less than planned.
- **Consultant Costs:** Participants with paid consultants (n=36) spent more on this expense than they had expected by a wide margin (75%). Of those remaining, 19% paid about as much as anticipated, and just 6% paid less than planned.
- **Contracted Services:** Among organizations that paid for contracted services (n=35), more than two thirds (69%) had higher expenses than predicted, 29% spent about as much as expected, and only 3% had lower costs.
- **Travel:** Most respondent organizations had budgeted for travel expenses (n=36). Among them, nearly one in three (31%) had higher costs than expected, 17% had costs about the same as they expected, and about half (52%) had lower travel expenses than anticipated.
- **Fundraising Event Expenses:** For organizations with fundraising event expenses (n=28), a plurality (46%) spent about as much on these events as they planned. Almost a third (32%) had higher expenses than planned, and 21% had lower expenses in this area.
- **Program Events/Direct Program Service Costs:** Organizations with program events or direct program service costs (n=34) spent more than expected by about one third (32%), less than expected by nearly one quarter (24%), and about as much as expected by 44%.
- **Website and Technology:** All organizations had web and technology costs (n=38), and of these only 3% spent less than expected. Most (55%) had about the expenses expected and the rest of the participants (42%) had higher costs than planned.
- **Materials and Supplies:** More than half (59%) of organizations with material and supply costs (n=37) had about as much expenses in this area as predicted. About one quarter (24%) had lower costs than planned, and 16% had higher costs than expected.

Most Organizations Still Working Mostly or Entirely Remotely, But Facing Equity Challenges

Staff turnover in 2022. Almost all organizations (80%) reported some degree of net turnover in 2022, as shown in *Figure 4*. The majority (60%) reported a staff turnover rate below 30%, while 9% of organizations reported turnover of half of their staff or more, and 20% of organizations reported zero net turnover¹.

Figure 4: Proportion of Participants Experiencing Various Turnover Rates

n=35



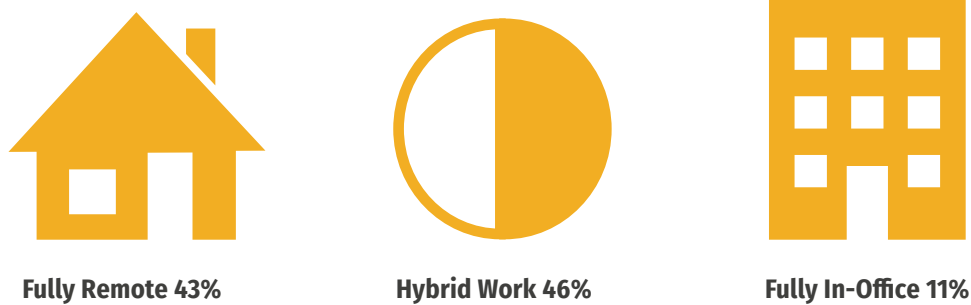
When asked, some organizations noted the impact of the “Great Resignation” as well as staff leaving due to COVID illness. Others highlighted that staff departures at their organizations were offset by hiring in 2022.

Staff hiring plans in 2023. Importantly, organizations’ future hiring plans indicate expectations that fully remote or hybrid work will continue in some form throughout 2023, with only 23% of participants planning to hire staff to work fully from the office. Others were planning to hire exclusively on a remote work basis (43%), or preferred to hire in-person staff but were willing to hire either temporarily remote staff (20%) or permanently remote staff (9%) on a case-by-case basis. A minority of organizations had no plans for 2023 hiring at all (6%).

Remote, hybrid, and in-person work. The majority of the respondents reported that their staff were working either fully remotely (43%) or a hybrid mix of remote and in-office (46%). Only 11% were working entirely from the office, as shown in *Figure 5*.

Figure 5: Most Organizations Had Fully Remote or Hybrid Work Policies

n=35

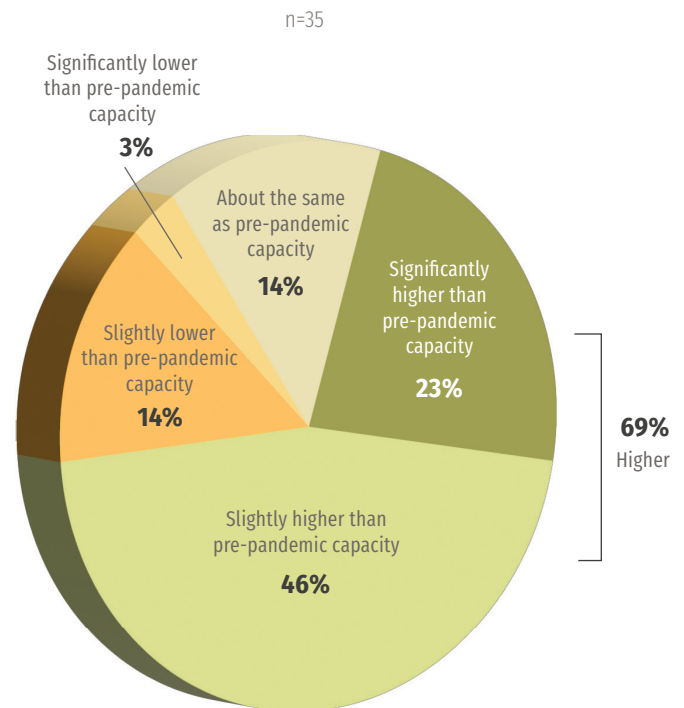


¹To put these rates in context, a [2022 report by Nonprofit HR](#) found that the turnover rate across social impact organizations in 2021 was 24%. In the same report, Nonprofit HR compared this rate with those in 2020 (14% turnover) and 2019 (21%). It is possible that the drop in 2020 was related to the onset of the pandemic, with the most recent rate reflecting a return to near normalcy.

Of those organizations with a hybrid office (n=16), 63% had instituted formalized hybrid work policies. Among those with hybrid policies (n=10), most had supervisors determine the number of days a staff member was to be in the office (50%) or had an across-the-board requirement that all staff work from the office three days per week (30%). Regardless of the quantity of in-office days required, in the majority of cases (50%) the staff members themselves were able to choose which days of the week they would be working in-person and remotely.

Operating capacity. Organizations were asked to reflect on the impact of COVID-19 on their operations since 2020 and to compare their current operating capacity to where it stood before the pandemic began. Notably, a majority of participants (69%) characterized their current operating capacity as higher than before the pandemic. Only 17% rated their operating capacity as lower than before COVID-19, and 14% reported that their capacity had stayed about the same, as shown in **Figure 6**.

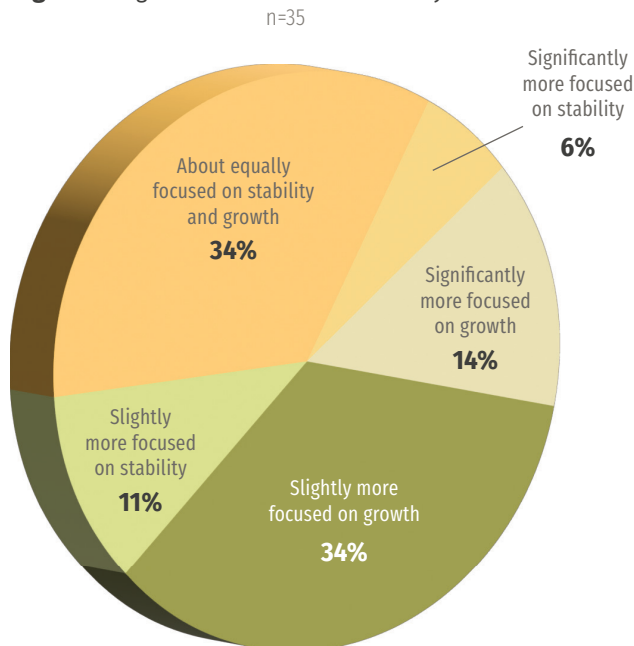
Figure 6: 2023 Operating Capacity



ORGANIZATIONS' OUTLOOKS TOWARD GROWTH AND STABILITY IN 2023

Participants were asked to report whether in 2023 their organizations were relatively more focused on growth or stability. Examples of growth could include staffing increases, new programming, and greater financial investments, while stability might consist of shoring up or maintaining cash reserves, maintaining current staff levels, or decreasing financial investments. Almost half (48%) of the organizations were more focused on growth, nearly one fifth (18%) were more focused on stability, and a little over one third (34%) reported being about equally focused on stability and growth, as shown in **Figure 7**.

Figure 7: Organizations' Focus on Stability vs. Growth



Note: Total may not be 100% due to rounding.

In the open-ended follow-ups to these questions, several themes emerged:

Among Organizations More Focused on Stability: Several participants reported a need to hire for existing positions in the wake of staff turnover. Relatedly some mentioned efforts toward staff retention and employee experience. Additionally, some in this group mentioned a desire to maintain the stability of programming.

Among Organizations More Focused on Growth: A major theme was growing their staff numbers. Many also mentioned financial growth, including securing new individual donors, new grants, government funding, and investments. Several organizations mentioned expanding programming and direct services, along with geographical expansion to serve a broader constituency. Finally, a number of organizations currently looking to grow mentioned improvements to infrastructure and operations.

CONCLUSION

As LGBTQI organizations progress through 2023, most are operating at or above their capacity levels from before the COVID-19 pandemic and many are focused on broad growth. Financially, organizations appear to be stable in terms of revenue and expenses. Organizations largely brought in revenues at or above what they planned for in 2022, except for event-related funds. Further, excluding consulting and contract services expenses, the plurality and, in some cases, a majority of organizations' costs matched their expectations in 2022. Notably, it is possible that increased web and technology costs will remain a staple of the post-COVID workplace. Further, there is likely a relationship between organizations' lower than expected travel costs and lower than anticipated event revenues, as many convenings remained virtual. Staffing continues to be a key challenge, with most movement organizations experiencing some degree of turnover and shifting expectations around remote, hybrid, and in-person work, and the vast majority have plans to hire new staff. It is possible that the higher-than-expected consulting and contract services costs reflect organizations relying more heavily on outside services to fill gaps in staffing. These findings align with what appears to be a receding pandemic.

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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