

COVID & THE LGBTQI MOVEMENT IN 2021: RESULTS FROM THE Q4 2021 COVID PULSE SURVEY

APRIL 2022



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

COVID-19 continued to disrupt key areas of both life and work in the last quarter (Q4) of 2021, including for LGBTQI and allied movement organizations and their staff.

This short report summarizes findings from a survey fielded in February-March 2022 about Q4 of 2021. The survey specifically asked about year-end financials, “The Great Resignation,” current challenges with staffing, and projections for 2022. The report shows that as a second full year of the pandemic drew to a close, these organizations have become skilled at financial planning and budgeting during an unprecedented and tumultuous time. It also shows the impacts of The Great Resignation on staffing and how that is shaping plans for 2022.

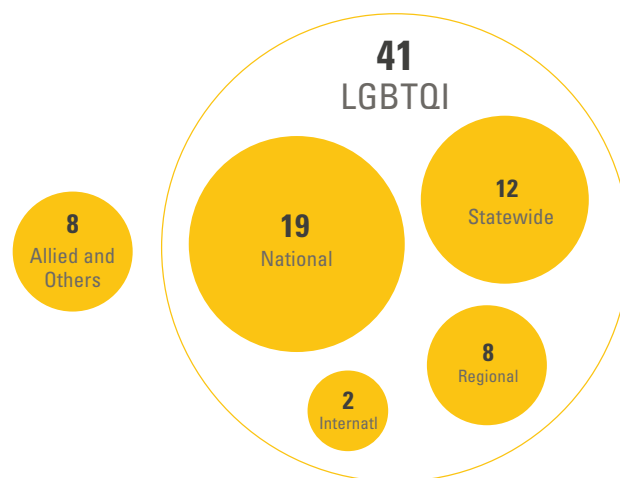
This report is part of a series of reports released by the Movement Advancement Project (MAP), starting in 2020, focusing on COVID-19 and movement organizations. This report builds on MAP’s 16 years of movement assessment and building research that has helped organizations identify opportunities and learn from one another, grounded funders in response strategies during times of need, and engaged individual donors more deeply in giving to the movement.

PARTICIPANTS

In total, 49 organizations participated in the retrospective Q4 survey, conducted in February-March 2022. As shown in **Figure 1**, the majority (84%) of participating organizations were LGBTQI organizations, and the remaining 16% were allied or other organizations.

Most participating organizations work primarily at the national or state level, though some report working primarily regionally (e.g., in the U.S. South) or internationally.

Figure 1: Majority of Participating Organizations are LGBTQI
n=49

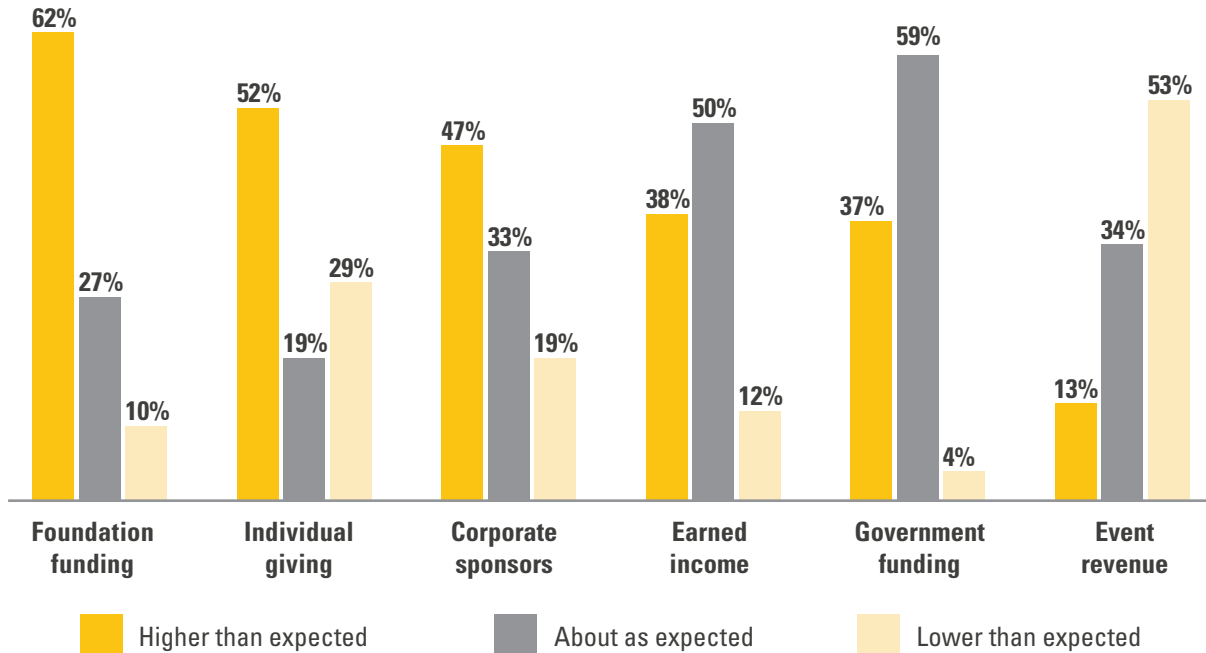


YEAR-END 2021 FINANCIAL OUTCOMES

Organizations’ Projections for 2021 Were Accurate, With Organizations Ending the 2021 with Higher or As-Expected Revenue and Lower or As-Expected Expenses

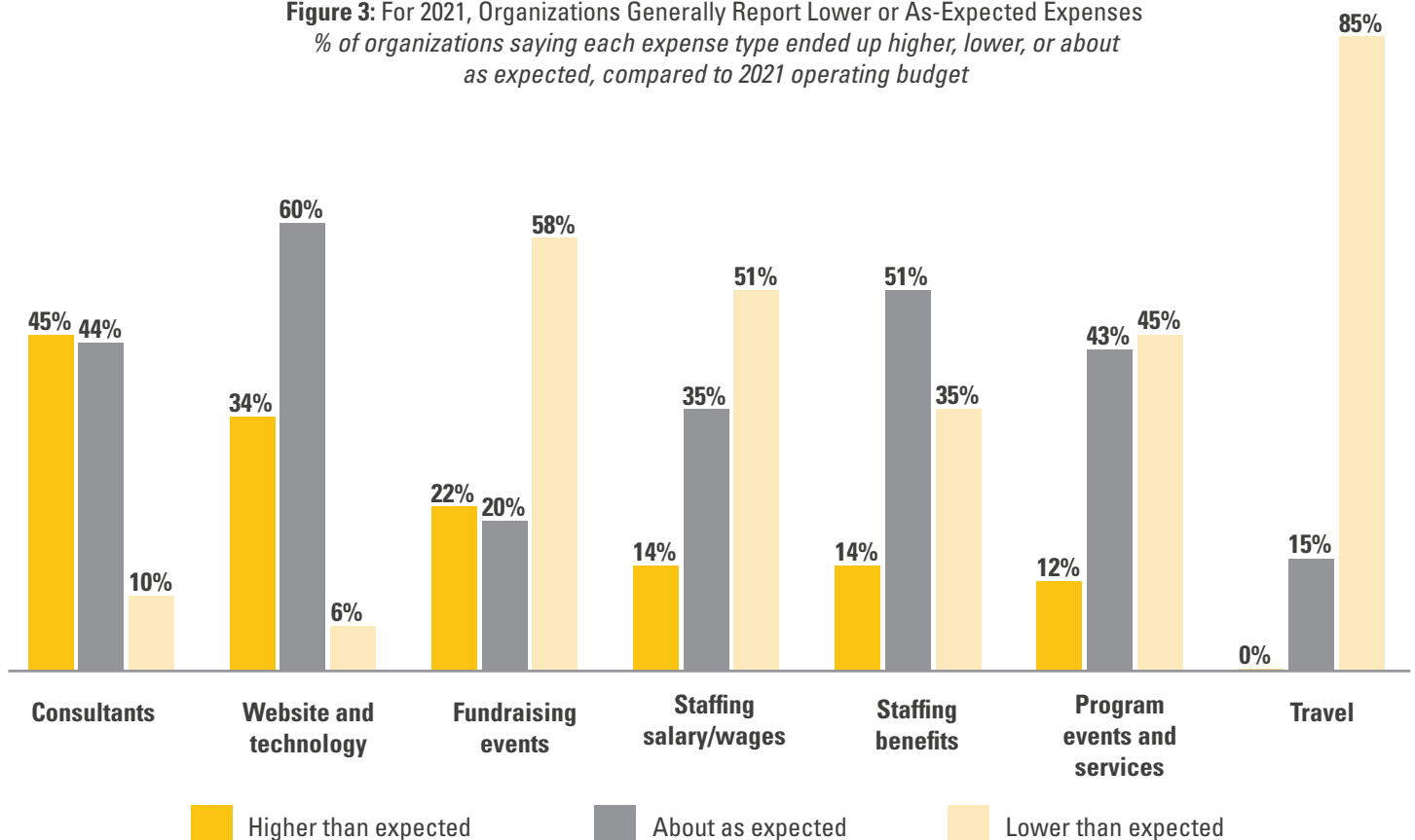
As **Figure 2** shows, at the end of 2021, organizations generally report higher or as-expected revenue, compared to their 2021 operating budget. This finding speaks to the improved projections of organizations at the close of 2020 when they set budgets for 2021. Higher or as-expected revenue was the norm across nearly all revenue sources. One exception is event-related revenue, with 53% of organizations saying event revenue in 2021 was lower than expected. As earlier reports in this series have addressed, the Omicron variant—like Delta before it—significantly affected many organizations and their plans for events and in-person fundraising.

Figure 2: For 2021, Organizations Generally Report Better or As-Expected Revenue—Except Event Revenue
% of organizations saying each revenue stream ended up higher, lower, or about as expected, compared to 2021 operating budget



Similarly, **Figure 3** shows that, at the end of 2021, organizations generally report lower or as-expected expenses, compared to their 2021 operating budget. Expenses related to consultants, as well as expenses related to website and technology, were the two categories that were most commonly reported to be “higher than expected.” In open-ended comments, multiple organizations reported that these increased expenses were driven by staffing/hiring challenges and the continued technology needs related to remote or hybrid working.

Figure 3: For 2021, Organizations Generally Report Lower or As-Expected Expenses
% of organizations saying each expense type ended up higher, lower, or about as expected, compared to 2021 operating budget



“We had staff leave the organization, which shifted expenses from salaries/benefits to consultants while we reset.”

“We budgeted for in person events and travel that did not materialize due to COVID-19.”

“Web and technology spending increased greatly in 2021 due to remote work and robust virtual events.”

The Importance of Pandemic Relief

When asked about the importance of Paycheck Protection Program (PPP) funding to organizations’ financial performance in 2021, 11 out of 49 organizations (22%) said this “does not apply” to them. The limits for organizations to apply for this federal funding changed from 2020 to 2021 and required organizations to demonstrate at least a 25% reduction in 2020 from 2019 in revenue. The program concluded in May 2021.

Among the organizations for whom this question applied, nearly all (84%) said that PPP funding was very or somewhat important to their financial performance.

Open-ended comments from all respondents who offered them emphasized the positive role that PPP funding and other sources of government-funded pandemic relief provided for their organizations’ financial health.

“Without the government aid, we would be a very different organization today.”

“Government provided pandemic relief remains critically important to the education agencies we work with across the country.”

THE GREAT RESIGNATION: 2021 STAFFING CHALLENGES

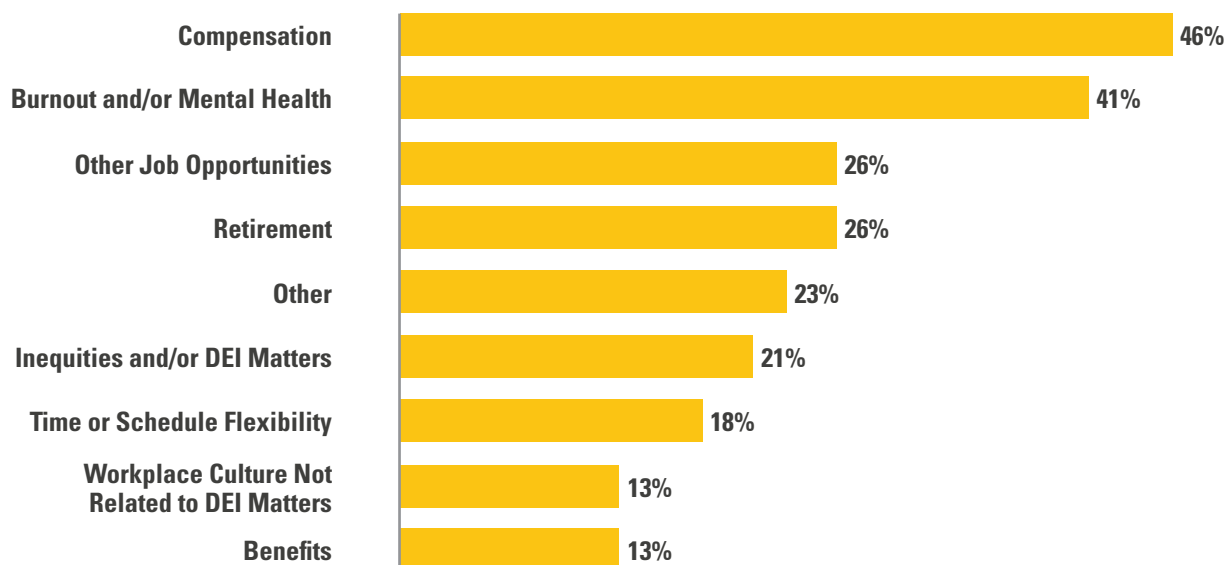
Organizations reported a wide range of staff turnover rates in 2021.^a Across all organizations that answered this question (n=48), the average turnover rate was 19%, with a low of 0% and a high of 69%. Among only the organizations that had staff turnover and reported the turnover rate (n=38), the average turnover rate was 23%, with a low of 3% and a high of 69%. Ten organizations reported they had no staff turnover in 2021.

Figure 4 shows reported reasons why staff left in 2021, though readers should note these reasons are reported by participants in this survey (i.e., those still at the organization) and not the former staff themselves. Nearly half (46%) of organizations that lost staff in 2021 cited compensation as a reason that staff left, followed closely by 41% of organizations mentioning burnout and/or mental health.

Importantly, more than one in five (21%) organizations that lost staff reported inequities and/or diversity, equity, and inclusion matters as a reason for staff turnover in 2021.

^a Benchmark or comparison turnover rates are mixed. The Bureau of Labor Statistics reports that, nationwide, the 2021 turnover rate was 47%, though there are no available breakouts for the nonprofit sector. However, the reported turnover rate for the potentially comparable “Government” industry jobs was 18%. A recently published survey by Nonprofit HR suggests that, in 2020, the turnover rate for “social impact organizations” was 14.3%, and further suggests that these organizations may be having a different experience of “The Great Resignation” (i.e., lower turnover) than other sectors. However, data from 2021 were not reported, and other research by The Work Institute (though not specific to nonprofits) and others demonstrates clear increases in turnover since 2020.

Figure 4: Compensation and Burnout Are Top Cited Reasons For Staff Turnover in 2021
 % of organizations reporting each reason that staff left in 2021 (n=39)



Note: These reported reasons are not necessarily separable (e.g., compensation may also be a matter of inequity and/or diversity, equity, and inclusion).

CURRENT STAFFING CHALLENGES & RESPONSES

Organizations Report More Openings Than Usual and Longer Times to Fill Open Positions

When asked about current openings (current at the time of the survey, February-March 2022), organizations reported an average of four current open positions, but with a high of 50 currently open positions.

The majority (57%) of organizations said the number of currently open positions is “about normal” for them, but more than one-third (37%) said they have “more open positions than usual.” No organization reported they had fewer openings than usual. This is consistent with previous findings in this Pulse survey series, such as the Q2 report which showed that organizations reported significant challenges in staff turnover and in filling open positions.

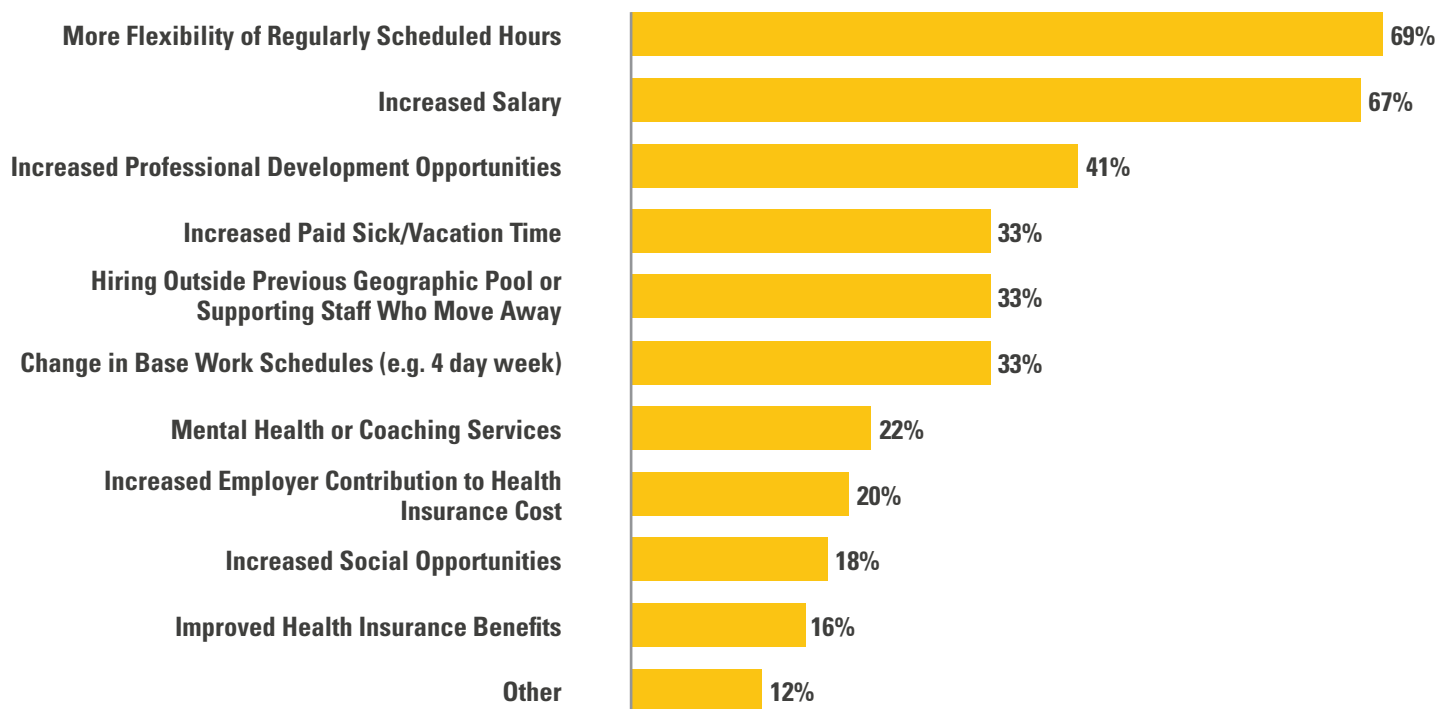
When asked about how long on average it is taking organizations to fill open positions over the past year, the average reported time was 11 weeks, or nearly three months. Roughly equal numbers of organizations said this was “about normal” (49%) or was taking “longer to fill than usual” (45%). No organizations said that positions were filling in a shorter time than usual.

Organizations Report Numerous Steps Taken to Hire, Support, and Retain Staff—More Commonly Focused on Schedules and Salary, Less Commonly on Health Services and Cost

As shown in **Figure 5**, organizations have taken many different steps to hire, support, and retain staff since the onset of the pandemic. More than two-thirds of organizations have increased flexibility of regularly scheduled hours (69% of organizations) and increased salary (67%).

Fewer organizations reported changes to mental health services (22%), employer contribution to health insurance cost (20%), and health insurance benefits (16%). However, a third of organizations (33%) did increase paid sick or vacation time.

Figure 5: More Flexibility and Increased Salary Are Top Two Changes to Hire, Support, and Retain Staff Since the Pandemic
% of organizations reporting each change since the beginning of the pandemic (n=49)



LOOKING AHEAD TO 2022

Majority of Organizations Plan to Increase Staff in 2022, But Not Benefits

The survey was conducted in February-March 2022. Organizations were asked, based on what they knew at the time, whether they anticipated their organization making any changes to staffing or benefits in 2022.

Overall, 67% of organizations reported they expected to add new staff in 2022, and another 29% said they anticipated no changes. Only one organization said they expected to decrease staff.

In contrast, roughly 37% of organizations said they planned to increase or improve benefits in 2022. The majority, 61%, said they are currently not planning any changes to benefits this year.

Among organizations that are planning to increase or improve benefits this year (n=18), the most commonly planned change is salary increases, followed by more professional development opportunities, and then by increased schedule flexibility. Nearly all organizations planning to improve benefits in 2022 reported that they were planning multiple changes (e.g., increasing salary *and* employer contribution to health insurance costs, etc).

Among Organizations That Haven't Yet Reopened, Most Have No Timeline For Reopening Due to Continued COVID Uncertainties

When asked about plans for reopening or returning to offices, roughly equal numbers have already reopened (35%) or plan to reopen sometime in 2022 (34%). However, among those organizations intending to reopen sometime this year, most had no specific timeline or were not sure exactly when they would reopen, due to ongoing uncertainties caused by the pandemic.

Six organizations (12% of respondents) said they became fully remote since the pandemic and do not intend to return to a physical location.

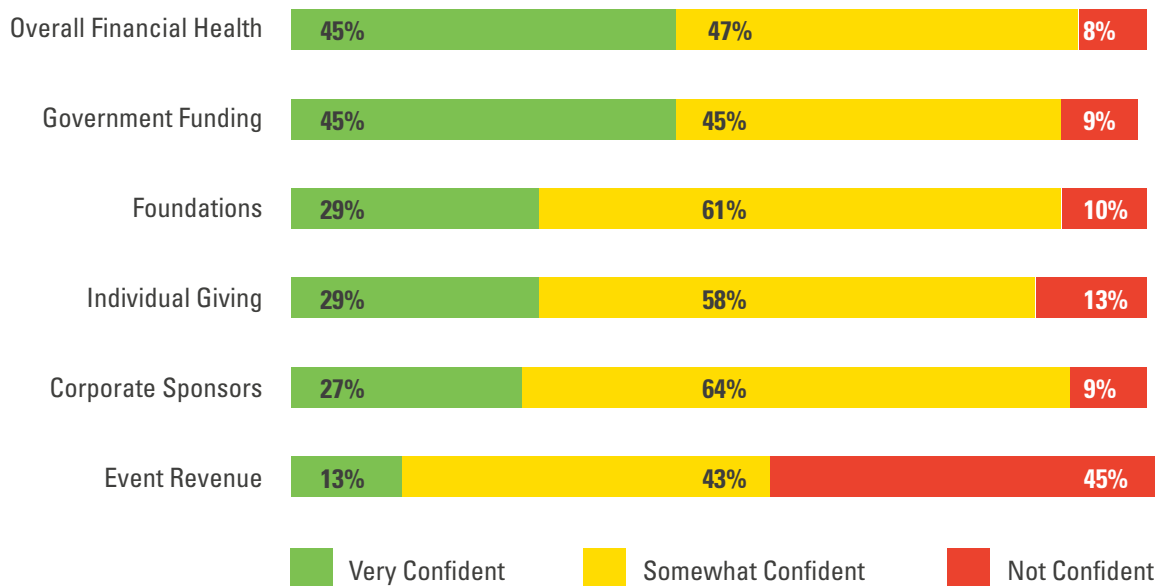
An additional eight organizations (16% of respondents) were already fully remote even prior to the pandemic.

“Every time we make a plan, it has been blown up by COVID. So right now we have resolved not to make a plan. Staff come into the office as the wish/can and work remotely the rest of the time. We will revisit whether or not to make a plan in May.”

Organizations Are Generally Confident in Financial Health For the Coming Year, But Remain Skeptical Of Event Revenue

As shown in **Figure 6**, nearly all organizations are very confident (45%) or somewhat confident (47%) about their overall financial health over the next 12 months. However, this confidence varies across different sources of revenue. Organizations report the highest confidence in government funding (among organizations that receive government funding), and the least confidence in event revenue.

Figure 6: Organizations Are Generally Confident in Overall Financial Health, But Not in Event Revenue, Over the Coming Year
% of organizations reporting confidence levels over the next 12 months



Note: May not sum to 100 due to rounding.

Top Concerns for 2022 Center on Events, Cash Flow, and Foundation and Individual Giving

Organizations were asked to identify their top three concerns for the next year. The top concern was the only one mentioned by a majority of organizations, with 55% of organizations citing the ability to host successful events as a top three concern for the coming year. The next closest all were mentioned by roughly one-quarter of responding organizations: maintaining a healthy cash flow (27%), decreases in foundation grant funding (25%), and decreases in individual giving (25%). Write-in responses also mentioned concerns about hiring and retaining the best possible staff.

When asked about what facts were causing or shaping these top concerns, responding organizations frequently cited fears of new variants of COVID-19, ongoing challenges with hiring and retaining staff, and continued turbulence or uncertainty in major sources of revenue such as foundations, government grants, and individual giving.

“We are concerned about 2022 because without revenue being restored to pre-pandemic levels from our regular donors, we will have to make some difficult decisions.”

“We were notified that some foundations will no longer be providing grants to our focus area, so we have to reflect on our attainable goals for foundations and corporate sponsors in the next fiscal year.”

CONCLUSION

This report shows that as a second full year of the pandemic drew to a close, LGBTQI and allied organizations have become skilled at financial planning and budgeting during an unprecedented and tumultuous time—including amidst yet another COVID-19 variant in the latter half of 2021.

This report also highlights the significant and still ongoing impacts of “The Great Resignation,” with considerable staff turnover for many organizations over the past year and continued challenges in filling open positions. However, movement organizations reported many actions they have already taken to better support, retain, and recruit staff, and further that they majority of organizations hope to add new staff in the coming year.

Top concerns for 2022 remain focused on staffing and cash flow, including with respect to event revenue, foundation funding, and individual giving. Continued resources and support are needed to sustain LGBTQI and allied organizations in this still rapidly changing time.

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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