

# LOOKING AHEAD TO 2021: THE IMPACT OF COVID-19 ON THE LGBTQI MOVEMENT

JANUARY 2021



## 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).

---

### Contact Information

#### Movement Advancement Project

1905 15th Street #1097  
Boulder, CO 80306  
1-844-MAP-8800  
[www.lgbtmap.org](http://www.lgbtmap.org)

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  
Ford Foundation  
Gill Foundation  
Esmond Harmsworth  
Evelyn & Walter Haas, Jr. Fund  
Jim Hormel  
Johnson Family Foundation  
Laughing Gull Foundation  
Weston Milliken  
Ineke Mushovic  
The Palette Fund  
Mona Pittenger  
Ted Snowdon Foundation  
Tzedek Social Justice Fund  
H. van Ameringen Foundation  
Wild Geese Foundation

**Recommended citation:** Movement Advancement Project. January 2021. *Looking Ahead to 2021: The Impact of COVID-19 on the LGBTQI Movement*. <https://www.lgbtmap.org/2021-covid-impact-report>

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, as well as other research on the capacity of the LGBTQI movement, please visit [www.lgbtmap.org](http://www.lgbtmap.org).

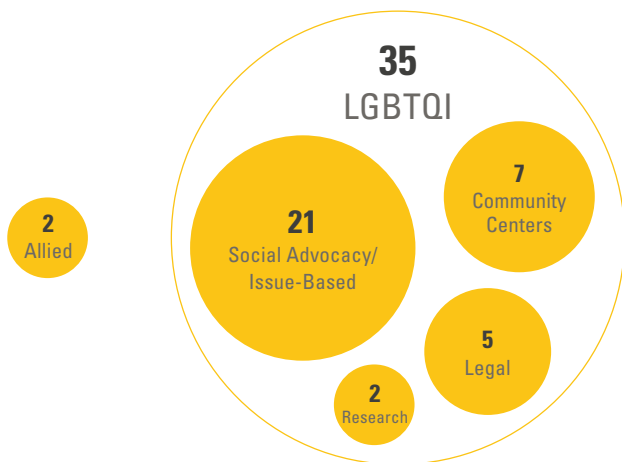
The COVID-19 pandemic has drastically shifted nearly all parts of life. As we start a new year, there is much uncertainty as to how COVID-19 will continue to shape our lives in 2021. For organizations working on behalf of lesbian, gay, bisexual, transgender, queer, and intersex (LGBTQI) people in the United States, it is clear that their financial outlooks and stability for 2021 will continue to be impacted by the pandemic.

For 16 years, the Movement Advancement Project (MAP) has conducted annual surveys of the nation’s leading LGBTQI social justice organizations as well as biennial surveys of the nation’s LGBTQ community centers. Building on this expertise, MAP conducted a series of surveys in 2020 to assess the impact of COVID-19 on organizations’ financial projections and stability with a focus on revenue and expenses, cash reserves, relief sources, and short-term and long-term planning.<sup>1</sup> This report provides findings from the November 2020 survey in which organizations were asked to share their experiences during the year and their plans as they look forward to 2021.

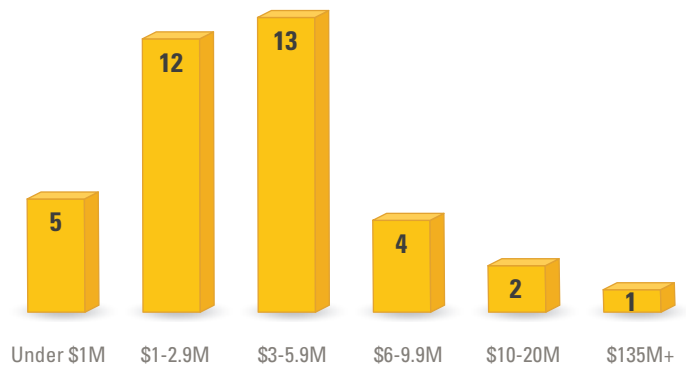
## PARTICIPANTS

MAP received responses from 37 organizations to the November 2020 survey. A majority of the organizations are LGBTQI-focused, though they include advocacy organizations, community centers, legal groups, and research organizations. Two allied organizations also participated, as shown in **Figure 1**. The majority (86%, or 32 out of 37) of participating organizations had original projected 2020 budgets of \$1 million or more, with two-thirds (68%, or 25 out of 37) having budgets between \$1 million and \$6 million, as shown in **Figure 2**.

**Figure 1: Majority of Participating Organizations are LGBTQI**  
n=37



**Figure 2: Majority of Organizations’ Original 2020 Budgets Were Over \$1M**  
n=37



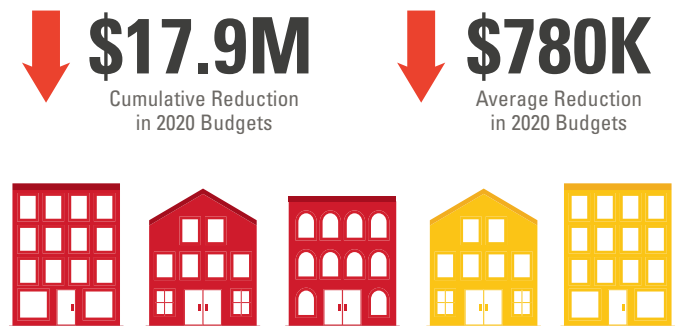
## IMPACT OF COVID-19 ON ORGANIZATIONS’ FINANCES IN 2020

Throughout 2020, MAP surveyed organizations about how the pandemic was impacting their financial health. The November survey provided the broadest view of the impact, allowing organizations to reflect on the past eight months.

### Impact on Organizations’ Budgets

Three in five (62%) participating organizations revised their 2020 budget projections during the course of 2020, as shown in **Figure 3**. The average amount of budget revisions was a reduction of \$779,900. Cumulatively, organizations that revised their 2020 budgets during the course of the year reduced their projected budgets by a total of \$17.9 million, an 8% reduction among those who revised budgets. Of all organizations, including those who did not make revisions, this reduction reduced overall organizational budgets by 6%.

**Figure 3: Three in Five Organizations Revised 2020 Budgets Over the Course of the Year**  
n=37



<sup>1</sup> A September 2020 report summarizing previous surveys is available [here](#).

Importantly, organizations revised their budgets due to many changing factors. Among the most cited factors for budget reductions were decreased income (67% of those who revised budgets cited this reason) and intentional expense cuts (42%), as shown in **Figure 4**. Among the most cited reasons for budget increases were unexpected expense savings (52% of organizations who revised budgets cited this reason), receipt of relief funding (48%), and income increases (24%). These reasons speak to the fact that organizations did not solely experience losses in income and cuts in expenses, but rather they responded to a changing environment in which they may have also experienced savings and influx of government relief (see more about government relief below).

**Figure 4: Organizations Cited Both Expense Cuts and Savings for Budget Revisions**  
*Percent of Organizations Citing Each Reason for 2020 Budget Revisions (n=33)*



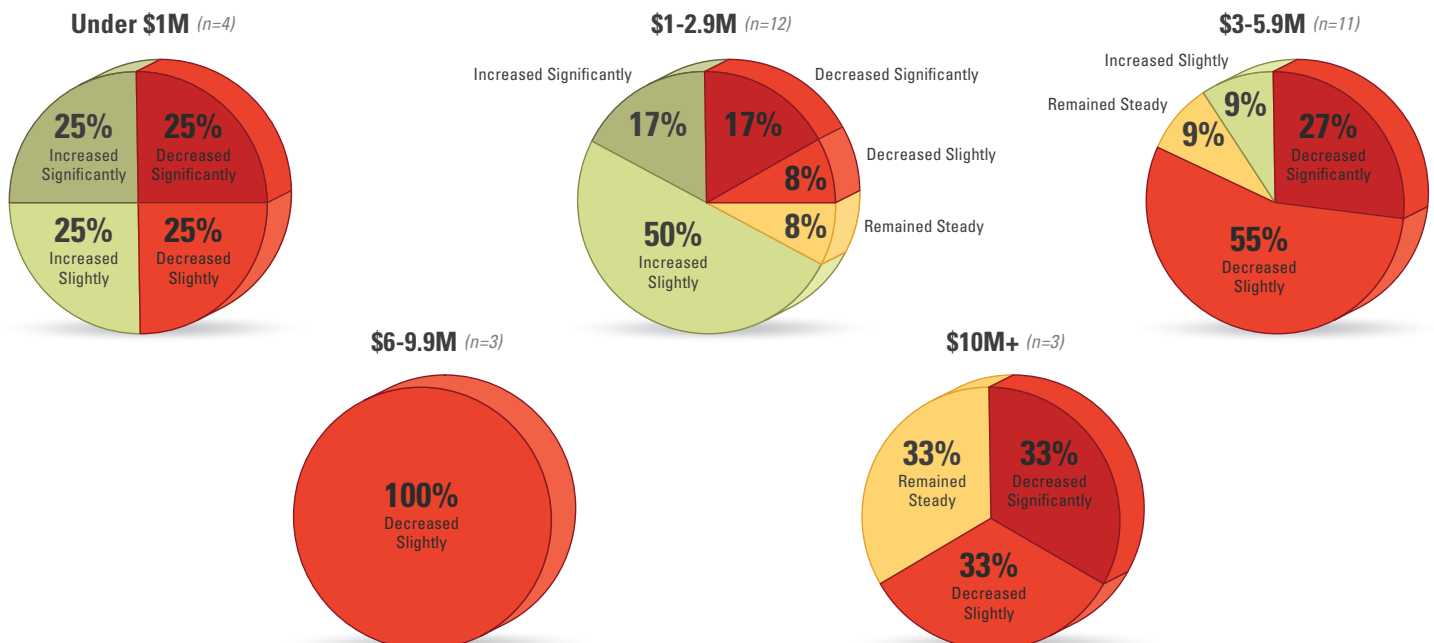
### Impact on Income in 2020

When asked in more detail about the impact of COVID-19 on income in 2020, 57% of organizations said their income had declined, including 21% saying it had declined significantly and 36% experiencing slight drops, as shown in **Figure 5**. Despite this, one in three (33%) of organizations reported their income had increased, while just 9% had their income stay relatively steady. **Figure 6** shows that organizations' experiences with income changes during 2020 varied significantly depending on their original budget size.

**Figure 5: A Majority of Organizations Reported Drops in Income in 2020**  
*(n=33)*

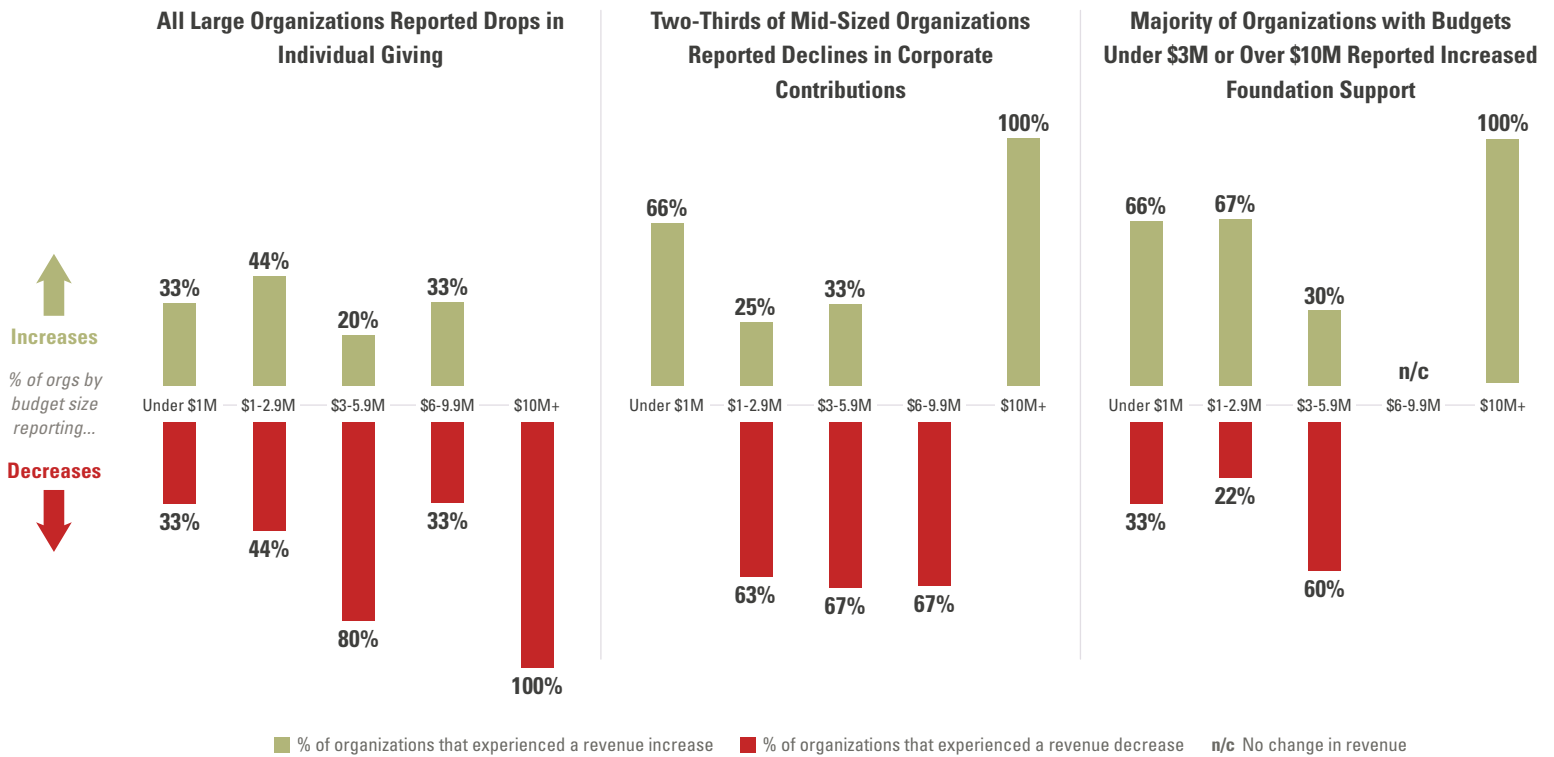


**Figure 6: Changes in Income During COVID Varied By Organization Budget Size**  
*Percent of Organizations, by Original 2020 Budget Size, Reporting Changes in Income During 2020*

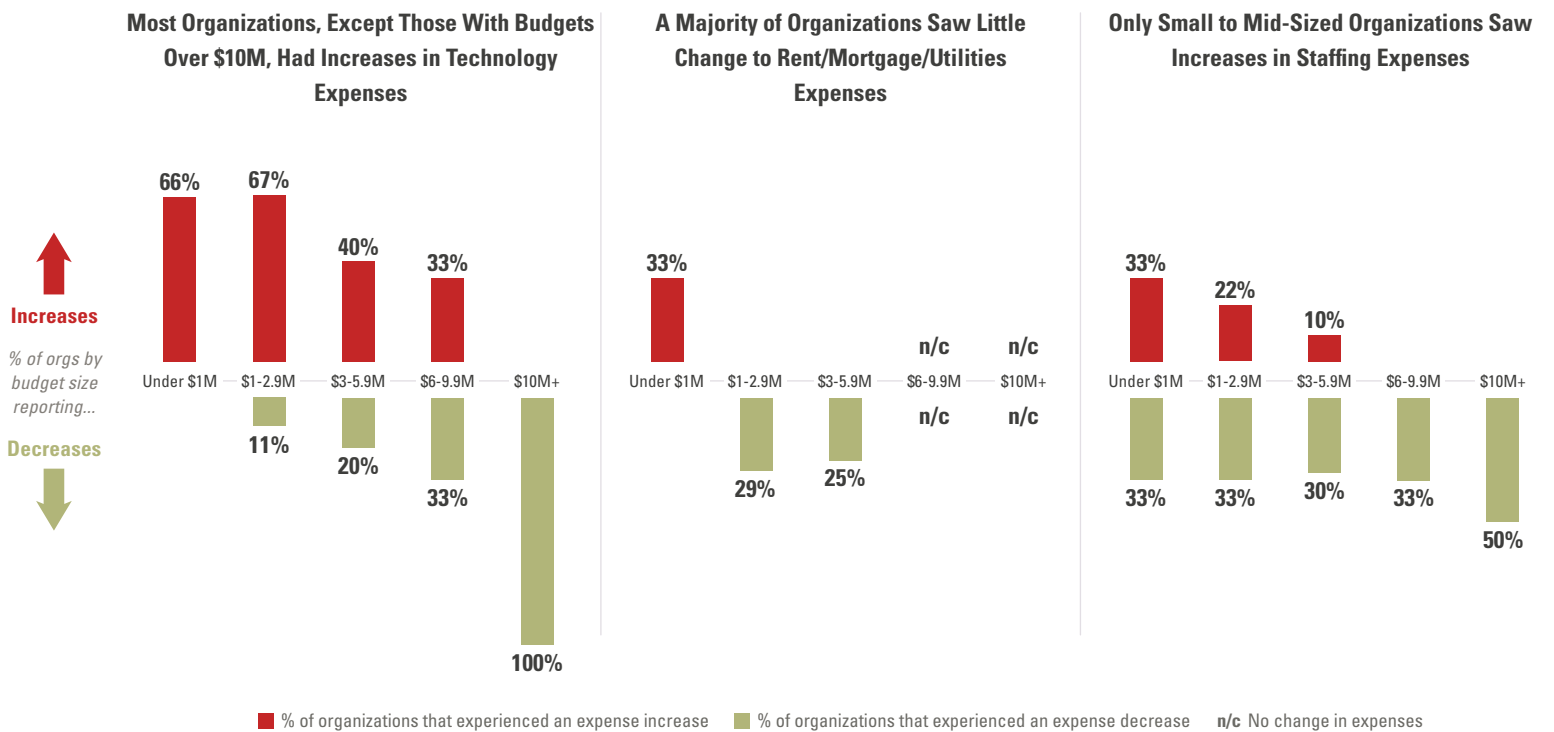


**Figure 7: COVID's Financial Impacts on Revenue and Expenses Varied by Organizations' Budget Size**  
 Percent of Organizations, by Budget Size, Reporting Revenue and Expenses Changes During 2020

### Revenue Changes During 2020



### Expenses Changes During 2020



Note: Organizations could also report no change in each revenue or expense category. This figure shows only those that reported changes, therefore percentages shown here may not sum to 100.

Among key revenue sources, the following overall trends were seen during 2020, with detailed trends by organization budget size shown in **Figure 7**:

- **Event Registration:** Not surprisingly, given shutdown orders and limits on gatherings, 75% of organizations experienced decreased income from event registrations or ticket sales, with half (50%) of all organizations experiencing a 50% or greater drop in this type of revenue. For more about events and how organizations adapted, see page 6.
- **Individual Giving:** Not surprisingly, given the impact of the pandemic on households, 59% of organizations reported declines in individual giving, including 11% experiencing decreases of 50% or more. Notably, one in four organizations (26%) reported individual giving increased by 10% or more, with 30% of organizations reporting individual giving increased at all.
- **Corporate Contributions:** Half (52%) of organizations reported declines in corporate contributions, with most of these reporting a decline of 10-24%. One-third (36%) of organizations experienced increases in corporate contributions. Two organizations indicated their corporate giving had declined by 75% or more.
- **Foundation Income:** Nearly half (48%) of organizations reported increases in foundation support during 2020, while one in three (33%) reported declines. For more about types of relief, including rapid foundation funding, see page 5.
- **Government Funding:** Half (50%) of organizations receiving government grants saw no change in that income. Among the other half, 29% saw reductions and 21% received increases.

**Figure 8: A Mixed Picture of Individual Giving and Corporate Contributions in 2020**

*% of Organizations Reporting Declines or Increases During 2020 (n=27)*



## Impact on Expenses in 2020

Nearly all responding organizations (89%, or all but three organizations) reported that 2020 overall expenses declined. Organizations were roughly split between reporting slight expense declines and significant expense declines.

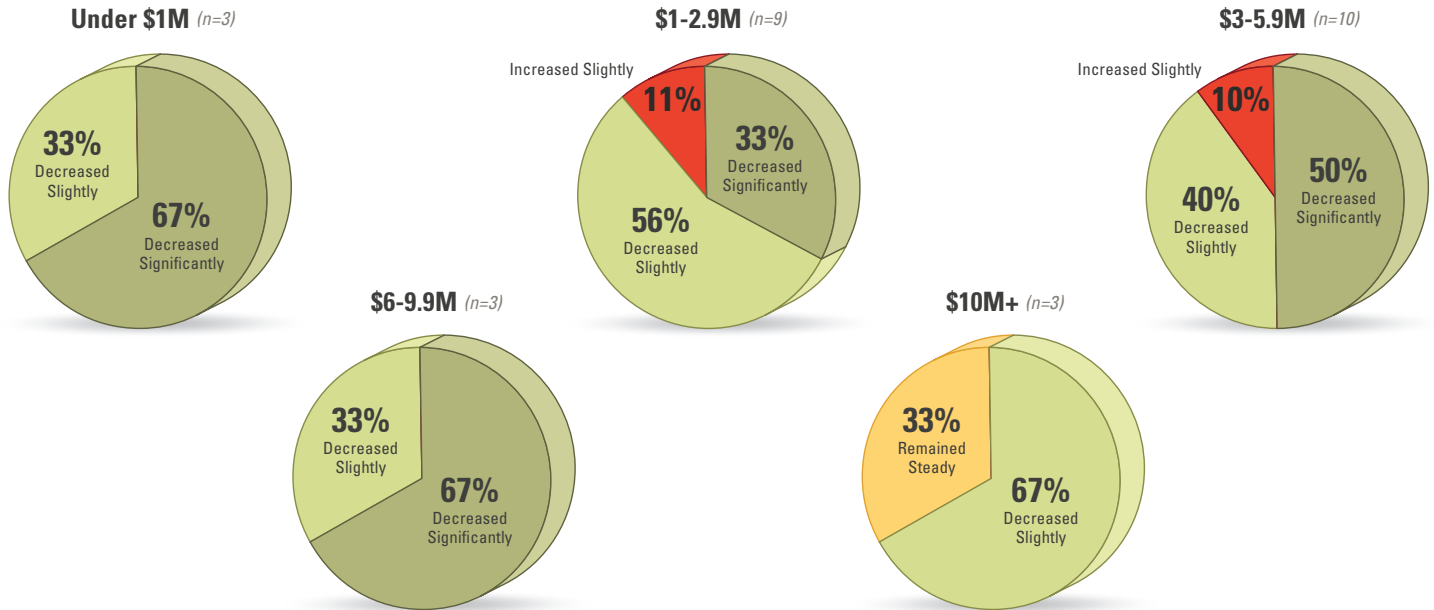
Among key expense categories, the following overall trends emerged, with detailed trends by organization budget size shown in Figure 7:

- **Event Expenses:** Mirroring event registration and ticket sale income all but vanishing as a result of safety concerns and public health measures, organizations reported substantial drops in event expenses. All but two organizations reported that event expenses dropped in 2020, as shown in **Figure 11** on the next page. Four out of five (81%) of organizations experienced a decline of 50% or more in event expenses. For more about events and how organizations worked to move events online, see page 6.
- **Travel expenses:** Not surprisingly given the pandemic and its cancellation of meetings, conferences, and in-person events, nearly all (93%, or all but two) organizations saw travel expenses decline, including 78% that saw travel expenses drop by 50% or more.
- **Technology Expenses:** Half (56%) of organizations indicated their technology expenses increased in 2020, likely a result of the shift to remote work.
- **Rent, Mortgage, and Utilities:** More than three quarters (78%) of organizations reported that these expenses stayed stable during 2020, while 17% reported drops in rent, mortgage, and utility expenses. This may be a result of the fact that organizations were unable to make changes to rent or mortgage arrangements during the pandemic, even if their staff shifted to working remotely and spaces were empty. For more about how organizations managed their physical spaces, see page 6.
- **Staffing:** Half (52%) of organizations reported no change in staffing expenses, while 33% said staffing expenses declined with most reporting minor (less than 10%) declines. This is likely a result of the Paycheck Protection Program (PPP), which is discussed in more detail below.

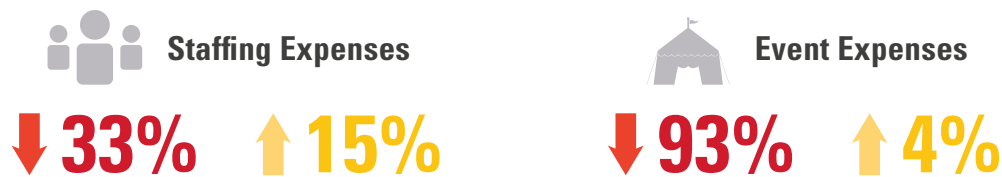
**Figure 9: Majority of Organizations Reported Drops in Expenses in 2020**  
(n=28)



**Figure 10: Changes in Expenses During COVID Varied By Organization Budget Size**  
% of Organizations, by Original 2020 Budget Size, Reporting Changes in Expenses During 2020



**Figure 11: Organizations Reported Declines in 2020 for Several Key Expense Categories**  
% of Organizations Reporting Declines or Increases During 2020 (n=27)



**IMPACT ON ORGANIZATIONS' STAFFING, EVENTS, AND OPERATIONS IN 2020**

Beyond income and expenses, organizations have worked to navigate the past eight months of the pandemic, despite substantial impacts on many parts of their operations.

**Staffing Levels.** Comparing staffing levels in January 2020, including open positions, to those at the end of October, organizations reported a cumulative decline of 5% or 72 positions, with the number of part-time positions dropping 29% compared to just 3% for full-time positions. As discussed in more detail on page 7, organizations as a whole do expect to recover some positions, especially full-time positions, by January 2021.

Despite these cohort-wide reductions, a large number of organizations (38%) reported they made no staffing-related changes to their budgets during the course of 2020. Of those organizations that made changes, the changes that were most often cited included postponing salary and wage or benefits increases (35% of organizations), limiting staff capacity (23%), and adding staff (23%).

**Receipt of relief.** Virtually all organizations (88%) indicated they applied for and received federal Paycheck Protection Program (PPP) loans, cumulatively totaling \$17.1 million in relief, as shown in **Figure 12**. Organizations predict that approximately half (56%) of the total \$17.1 million in PPP loans will be forgivable. Two in five (40%) organizations that received PPP loans also received some other form of relief. Only one organization did not receive a PPP loan but did receive other relief funding. In all, one in four (24%) organizations accessed private relief funding, with smaller numbers relying on COVID-specific grants, other federal or state aid, and private foundation or corporate support. Fewer than one in ten (9%) received no relief funding at all.

**Figure 12:** Nearly All Organizations Received Federal Paycheck Protection Program (PPP) Loans

**88%** of organizations received PPP loans totaling **\$17.1M**  
Of these organizations, **40%** also received additional sources of relief

**Impact on events.** Many organizations had fundraising events planned for 2020. With the physical distancing recommendations, event venue closures, and overall upheaval from the pandemic, organizations had to quickly respond. Many organizations took a multi-prong approach: canceling events, moving events online, and postponing events to 2021. For example, many organizations (71%) canceled events, and the same number of organizations (71%) hosted virtual events. In total the 16 responding organizations that went ahead with events in 2020 hosted a total of 46 virtual events. Of the few organizations that shared their experience with virtual events, most said they performed somewhat or significantly better than expected financially and the nearly all said that attendees were somewhat or very satisfied.

**Impact on physical buildings and spaces.** The majority of organizations (83%) indicated they temporarily closed their physical office locations as result of the pandemic, with one third indicating they reduced service capacity or service hours.

## LOOKING AHEAD TO 2021

Organizations were asked how they are planning for 2021 and the uncertainty ahead. Notably, some organizations had already prepared their 2021 budgets, while others were still in the process at the time of the survey.

**Finalizing 2021 budgets.** Notably, of the 20 organizations with finalized budgets for 2021, a majority (60%, or 12 organizations) were projecting increases in their 2021 budgets compared to their most recent 2020 budgets; four (20%) were projecting lower 2021 budgets, and four (20%) were projecting no change in budget from 2020 to 2021.

In total, the 20 organizations with finalized budgets for 2021 reported a cumulative increase of \$29.2 million, relative to their combined 2020 budgets (revised if they revised or original if no revisions).

In setting budgets for 2021, organizations shared their assumptions for income and expenses. As shown in **Figure 14**, half (51%) of organizations said they expected a decrease in income, while one quarter (23%) expected income to stay the same as 2020 and another quarter (26%) expected an increase in income. Despite these numbers, fewer organizations (35%) are predicting making spending cuts, 34% anticipate spending being about the same, and 32% are planning on increases in spending. Notably, organizations that are projecting increases in expenses in 2021 but may also be expecting decreases in income for the year are carrying over a budget surplus from 2020—perhaps due to increased funding or the pandemic relief assistance they received.

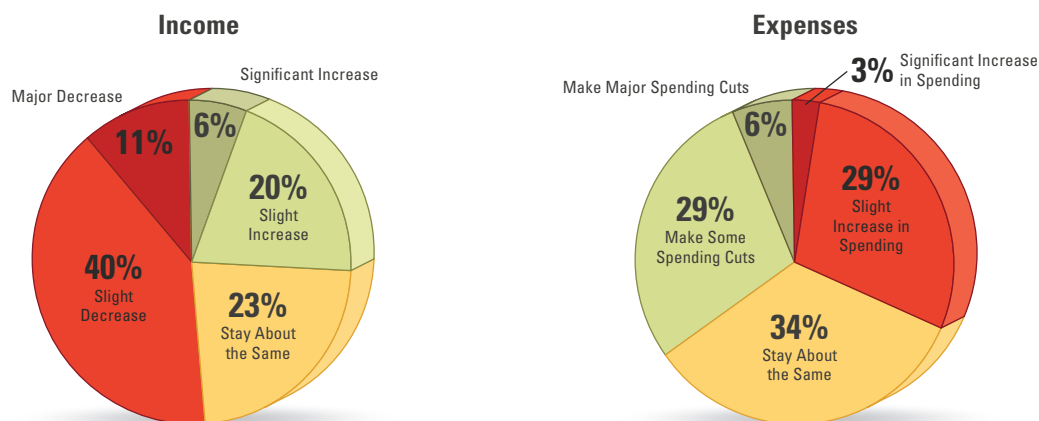
Looking specifically at organizations projecting decreases in income for 2021, two-thirds are planning to keep expenses the same or make expense cuts. That said, one in three (35%) plan to increase expenses.

**Figure 13:** Organizations Have a Mixed View of 2021

**60%** of organizations project budget increases for 2021  
As a group, they anticipate **\$29.2M** increase



**Figure 14: Organizations' Assumptions About Income and Expenses in 2021 Compared to 2020 Are Mixed**  
*% of Organizations Expecting Increases or Decreases/Cuts in 2021 Income and Expenses*



**Projections for income in 2021.** Organizations were asked about their projections for key sources of revenue for 2021. Importantly, most organizations expressed they were “somewhat confident” in making these various projections.

- **Foundation support:** Slightly more than half (56%) of organizations are projecting decreases in foundation support in 2021, though all these organizations are projecting declines of less than 25%.
- **Individual giving:** Half of organizations (50%) are projecting declines in individual giving for 2021 compared to 2020, with 31% projecting decreases of 10-24% and 19% planning for declines of 1-9%. That said, one in three organizations are projecting no change in 2021.
- **Government funding:** Likely a result of the pandemic and the need for increased spending and reduced tax revenues, half of organizations (50%) are anticipating cuts in government funding in 2021 compared to 2020, and one in three anticipate flat funding.
- **Event registration and ticket revenue:** With little certainty about the ability to hold in-person events in 2021, 47% of organizations are anticipating declines in event registration and ticket revenue, though equal numbers of organizations are projecting flat or increases in this source of revenue. Notably, many of the organizations projecting declines in this category plan to only hold virtual fundraising events and virtual programs or conferences in 2021.
- **Corporate contributions:** More organizations (41%) are optimistic about increased corporate contributions than are projecting declines (36%) or no change (23%). Again, anticipated increases and decreases are modest (24% change or less).

**Projections for expenses in 2021.** Organizations provided projections about expenses in 2021 compared 2020.

- **Travel expenses:** Likely a result of uncertainty regarding the safety of travel and in-person conferences and meetings, two thirds of organizations (68%) are projecting decreases in travel expenses from 2020 (where they’d already been reduced substantially) into 2021. In fact, one in three organizations expect decreases of 50% or more from 2020 to 2021.
- **Event expenses:** Likewise, many organizations are cutting event expenses for 2021 compared to 2020, where they’d already been reduced substantially given the pandemic; 64% of organizations are decreasing spending on events in 2021 compared to 2020, including one in three who are slashing spending by 50% or more.
- **Technology expenses:** Half (50%) of organizations are expecting increases in technology expenses in 2021 compared to 2020, though most project modest increases of less than 25%.
- **Staffing expenses:** Nearly half (48%) of organizations report increases in staffing expenses, while 32% are projecting no change from 2020. Only one in five are projecting decreases in staffing expenses from 2020 to 2021.
- **Rent, mortgage, and utilities:** More than half (57%) of organizations expect no change in these expenses from 2020 to 2021. This may be organizations that are already locked into leases for the coming year or who own their buildings. However, a sizeable minority of organizations, one in three (38%) are projecting decreases in these expenses.

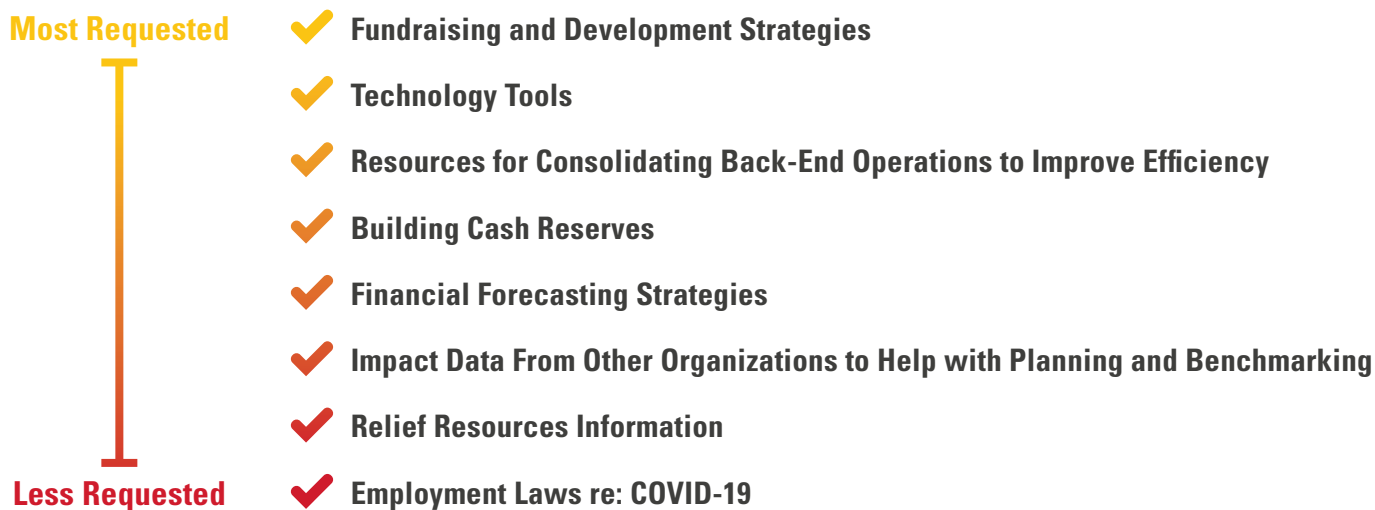
**Staffing expectations.** Overall, organizations appear to be optimistic about staffing in 2021. Half (46%) of organizations plan to hire and fill new positions in 2021, and 43% will be increasing salaries and wages. That said, one in three organizations indicated they plan to make no changes from 2020 to 2021, indicating less optimism.

**Event planning.** Organizations are remaining flexible and responsive in 2021. The majority of organizations indicate they are planning for both virtual fundraising events and virtual program events and conferences, with one-third of organizations making plans for in-person fundraising events and in-person program events and conferences.

**Space and facilities.** Of organizations with office locations that are still closed, more than half expect to reopen by June 2021, with June being the most cited month for reopening. Organizations report that they are evaluating their longer-term facility needs and considering alternatives when leases expire, but those may not be until late 2021 or even into 2022.

**Key areas for risk and uncertainty.** Organizations were asked to identify key areas for risk and uncertainty as they move into 2021. The most frequently cited items were fundraising for individual gifts, being able to host successful events, and foundation grants and renewals.

**Figure 15:** Key Resources Asked for By Organizations When Asked for Top 3 Needs



## OPPORTUNITIES FOR SUPPORTING ORGANIZATIONS IN 2021

Organizations were asked to identify key areas of support that would help them continue to weather the pandemic. Several key themes emerged.

First, the #1 most requested resource was “fundraising development strategies,” followed by “resources for consolidating back end operations” and “impact data from other organizations to help with planning and benchmarking.”

That said, a number of resources were mentioned among their top three priorities, as shown in **Figure 15**.

Finally, it is important to note how integral to organizations’ ability to maintain staff and keep budgets solvent in 2020 was the influx of relief funding, including the federal PPP loan, and increased support from foundations. As organizations continue to do good work in 2021, such funding streams are vital, as are consistent and generous support from individuals.

## ABOUT THIS REPORT

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



movement advancement project ▶

1905 15th Street #1097 • Boulder, CO 80306-1097  
[www.lgbtmap.org](http://www.lgbtmap.org)