

AMERICAN SOCIOLOGICAL REVIEW

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Contents

- 1.1 Interview Guide
- 1.2 Interview Sampling Strategy
 - Figure A.1. Sampling Matrix
- 1.3 Data Dictionaries
- 1.4 Select Mission Statements Indicating Change in Political Generation Discourse
 - Table A.1. Example of Changes in Organizational Mission Statements that Reflect Each Political Generation
- 1.5 Assessing Organizational Heterogeneity
 - Figure A.2. Organizational Focus: Advocacy vs. Service
 - Figure A.3. Financial Size: Total Revenues
 - Figure A.4. Organizational Wealth: Net Assets

1.1 Interview Guide

Topics

- Understanding General Change
- Revenues and Inclusivity
- Mission or Program Service Accomplishments
- Intersectional Consciousness

Interview Guide

INTERVIEW ORIENTATION

Today we'll talk about your organization's mission statement and programming//services. I'm interested in the specific vocabulary that your organization uses. I'll ask you about how the mission statement and programs were developed, how they've changed, where they stand now, and where you might see them going in the future. We'll also talk about your org's relationship with stakeholders, donors, and other people external to your org.

REASSURE PARTICIPANT OF CONFIDENTIALITY & ACQUIRE VERBAL CONSENT TO RECORD

QUESTIONS

- 1) I've read your organization's mission statement, and before we get started, I want to make sure I have a thorough understanding of it. **[HAVE MISSION STATEMENT TO SHARE/READ ALOUD]** Could you explain to me in your own words what your org's mission statement is?

Great, let's talk about how your organization's mission statement was developed.

- 2) First of all, when was the most recent time your organization changed its mission statement?
 - a. What was your involvement//role in that process?
 - b. What were some of the factors motivating that change?
- 3) Tell me about that process of changing the org's mission statement. How did that process first start?
 - a. Sometimes mission statement changes and development can be smooth, other times more contentious. What was your process like?
 - i. Who was involved?
 - ii. What were their roles?
 - b. What would you say were the main factors you//your org considered throughout the process of changing the language of your mission statement?
 - c. I'd like you to think back to some of those deliberations. If I were a fly on the wall, tell me about what I would see or experience in those conversations.
 - i. **PROBE:** For example, what was the atmosphere like in the room?
- 4) Are there any other times the org decided to change its mission statement that you're aware of?
 - a. **IF NO:** SKIP TO [(5)]
 - b. **IF YES:** Do you know how many changes the mission statement has undergone?
 - i. **IF ONE OR 'NOT SURE/DON'T KNOW':** SKIP TO [(4) b. iii.]
 - ii. **IF >ONE:** CONTINUE WITH PRIMER... I'm interested in hearing about some of the biggest or meaningful transformations that have happened. These would be

- especially meaningful or even contentious changes in the mission statement. Think about one of those changes that you consider the most important or impactful.
- iii. Were you involved in that process?
 - iv. I'm curious about how *that* change came about//what happened during *that* time. What are some of the enduring stories from that time?
- 5) As you know, mission statements can vary a lot from org to org. Sometimes mission statements are pragmatic and reflect what the organization is currently doing. Other times mission statements are more vision-forward and incorporate aspirational elements. What do you feel like your organization's mission statement reflects?
 - 6) Your organization's mission statement uses the term **[[TERM OF INTEREST]]**. Do you know why the term was added or why you decided to include it?
 - a. Is there another term that your organization thought about including instead of **[[TERM OF INTEREST]]**?
 - 7) Some organizations add these terms after they've established programming for that population; others reference the population in their mission statement before they establish those services. What led your organization to choose that route that you did?
 - 8) I want to talk a bit about diversity. Organizations can take many approaches to addressing diversity, equity, and inclusion. What language does your organization use to define//discuss//address 'diversity'?
 - a. Is there any other vocabulary that your org uses?
 - i. **PROBE:** For example, terms in your mission statement or words used when you declare//describe programming? Through the expansion of programming, outreach, the board of directors?
 - 9) What, if any, conversations are your stakeholders initiating about diversity?
 - 10) We talked about how those working for the organization deliberated on mission statement language, but when do you or other staff leaders engage with folks *outside* of your organization specifically on that language?

Speaking of external relationships, I have a few questions specifically about your interactions with donors and granting agencies.

- 11) In general, what do you think attracts donors to give to your organization?
- 12) Organizations can receive donations of many sizes; you can have donors who contribute small sums of money to benefactors who offer major gifts and endowments. What do you think attracts those *major* donors to your org?
 - a. Is that different than what attracts *smaller* donors?
- 13) What makes up a larger portion of your revenues, major donors or small annual gifts?
- 14) In what ways have seen the language you use in your mission statement influence whether donors give to your organization?
- 15) What are your thoughts on how the mission statement language influences how *much* your donors give?
- 16) Sometimes donors suggest they will pull back or even cease their support if an organization's mission statement includes certain language or excludes certain language. Have you ever encountered something like this?
- 17) In what way, if at all, do you think the funding your org receives is related to the geographic area y'all are located?
- 18) When you apply for funds, what are some of the primary things you highlight to foundations//granting agencies?
 - a. Are the things you highlight *different* when you apply for a grant through the government?
- 19) Has a foundation ever asked you to include different language, vocabulary, or programming than what you wrote or what you offer?

I have just a few more questions about your organization today and its vision for the future.

- 20) Some organizations, especially those in your sector, express feeling under threat in the current political or social climate; others not so much. What do you feel like your organization is experiencing right now?
 - a. **IF YES THREAT:** How do you feel like the level of threat compares to what you have seen//your org has seen in the past?
 - b. **IF NO THREAT:** SKIP TO [(21)]
- 21) Relatedly, did marriage equality have any noticeable impacts on your organization: how it does its work, whether there was a noticeable change in resources? Something like that.
- 22) Organizations have limited resources, and sometimes they have to decide how to distribute those resources across diverse constituencies. Tell me about a time you have had to make a decision like that.
 - a. What factors influenced your decision?
 - b. What was going through your mind as you weighed your options?
- 23) Some organizations feel that if they don't innovate the language of their mission statement, they won't survive. They express feeling a 'pressure to innovate' the language. Other orgs feel that by innovating their language, they'll be on the vanguard of a trend and can possibly increase revenues for their org. What are your thoughts on this?
- 24) And lastly, what would it take for your organization to change its mission statement?
 - a. **PROBE:** For example, external or internal pressures, political or social shocks?

INTERVIEW SOFT CLOSE: Those are all the questions I have for you today.

- 25) Is there anything I didn't ask you about that I should have asked, or anything else that you want to talk about that didn't come up?
- 26) As we continue talking to LGBT nonprofit leaders, are there any leaders at other organizations that you would recommend we reach out to for this project?
- 27) Finally, would it be alright if a member of the research team reaches out to you in the event that we have any follow-up questions?

Thank you for your time! Feel free to reach out if you have any questions or concerns or you think of anything else you would like me to know.

1.2 Interview Sampling Strategy

Figure A.1 highlights which region and revenue strata the nonprofit fills, and the recruitment strategy used to identify the leader.

- = Random selection
- = Purposive sampling
- = Snowball recruit

Region	Revenue Category	Organization 1	Organization 2	Region	Revenue Category	Organization 1	Organization 2
Midwest	1	Support, Empower, Engage (SEE)	The Gathering	Northeast	1	Spectrum Community	Pride Pioneers
	2	Diversity Network	Harmony Inc.		2	City Rainbow Coalition	Lionheart Network
	3	Inclusivity Initiative	Rise Up		3	Haven Station	Radiant Shades Project
	4	Prism National	Foundation for Trans and Queer Rights		4	Liberty Network	
	5	Campaign for Real Recognition			5	Equity Alliance	Liberation League
South	1	National Equality Initiative	Equality Now!	West	1	Arts Inclusivity Fund	
	2	Pride Wisdom Alliance	Queer Involvement and Knowledge (QuIK)		2	Active Rainbow Collective	Unity Alliance
	3	Equality Shield	Pulse		3	Rainbow Sanctuary	LGBTQuality
	4	Pride Support Services	Equality Vision		4	Queer Empowerment	Queer Collective Nation
	5	Liberation Front	Liberty Hub		5	The Spectrum Sister Creative	Celebrate Progress

Notes: Names of all organizations are pseudonyms.

Strata with three organizations:

- South revenue category 5 (Nexus Impact, random selection)
- Midwest revenue category 1 (Pride Horizon, snowball recruit)

Revenue category indicates most recently filed tax filing (relative to 2016).

Category 1: < \$58,000; Category 2: \$58,001 - \$141,859; Category 3: \$141,860 - \$386,237; Category 4: \$386,238 - \$1,024,382; Category 5: > \$1,024,382

Figure A.1. Sampling Matrix

1.3 Data Dictionaries

Note: All spelling permutations, hyphenated forms, and so on are included in the dictionaries even if only the root is listed below.

Figure 1:

- *LGB:*
 - Mission statements that only mention: “gay,” “lesbian,” “bisexual,” “LGB,” “sexuality,” “sexual orientation,” “sexual identit*”
- *Trans-Queer+ Inclusive:*
 - Mission statements that mention: “transgender,” “transexual,” “transvestite,” “gender identit*,” “gender fluid*,” “gender expansive,” “non-binary,” “LGBT*,” “queer.”
 - Note that these mission statements may or may not also include the terms from the “LGB” category.

Figure 2:

- *Intersectionality:*
 - Mission statements that mention: “racis*,” “sexis*,” “islamophobi*,” “semiti*,” “classis*,” “structural,” “systemic,” “intersectional*,” “ageis*,” “ableis*,” “oppress*,” “colon*,” “equity,” “barrier*,” “migration,” “anti*,” “apartheid,” “blackness,” “reparation,” “xeno*,” “coloris*,” “racial*”
- *Note:* We measure intersectionality as structural intersectional consciousness on the part of nonprofits, rather than a series of identities.

Figure 3:

- *Civil Rights Framework*
 - “discrimination*,” “right*,” “civil,” “equality,” “hate crime”
- *Transformative Justice Framework*
 - “abolition*,” “liberation*,” “liberatory*,” “justice*,” “solidarity,” “eradicate,” “oppress*,” “equity,” “decolon*”

1.4 Select Mission Statements Indicating Change in Political Generation Discourse

Table A.1 provides example mission statements from publicly available Form 990 data that reflect the three salient distinctions between the Legacy and Emergent generations. Each row represents the *same* organization so we can track how their mission statement evolved from language reflective of the Legacy generation to that of the Emergent generation (and are not organizations reflected in our interviews). If a mission statement is classified as Legacy or Emergent for one dimension, it does not necessarily mean it falls under the same designation for the other dimensions, although alignment is typical.

Theme	Political Generation	
	Legacy	Emergent
Sexuality/Gender	Education of the medical establishment of the needs of gays and lesbians.	GLMA is a national organization committed to ensuring health equity for lesbian, gay, bisexual, transgender, queer (LGBTQ) and all sexual and gender minority (sgm) individuals, and equality for LGBTQ/SGM health professionals in their work and learning environments.
	To support gay and lesbian issues.	Astraea funds LGBTQI activism globally, serving as a feminist social justice hub and working side-by-side with grantee and donor partners to achieve racial, economic, social and gender justice worldwide.
Intersectionality	To present the diversity of lesbian, gay, and transgender lives in art so bold it breaks through personal isolation, challenges the status quo and builds thriving communities.	To present liberating art by, for, and about queer and trans people of color that transcends artistic boundaries, celebrates cultural abundance, and dismantles oppression.
	To mobilize philanthropic resources that enhance the well-being of LGBTQ communities.	Funders for LGBTQ Issues works to increase the scale and impact of philanthropic resources aimed at enhancing the well-being of lesbian, gay, bisexual, transgender and queer communities, promoting equity, and advancing racial, economic and gender justice.
	Extraordinary Lutheran Ministries believes the public witness of LGBTQIA+ ministers transforms the church and enriches the world.	Extraordinary Lutheran Ministries organizes queer seminarians and rostered ministers, confronts barriers and systemic oppression, and activates queer ideas and movements in the Lutheran church.
Strategy	To research, teach, systematize, and apply the nonviolent principles of Gandhi and Martin Luther King, Jr. to the current struggle of gays and lesbians in the United States.	End spiritual violence and oppression against LGBTQI people.
	Outfront's mission is to create a state where lesbian, gay, bisexual, transgender and queer people are free to be who they are, love who they love, and live without fear of violence, harassment or discrimination.	Outfront's mission is to create a state where lesbian, gay, bisexual, transgender and queer (LGBTQ) people are free to be who they are, love who they love, and live without fear of violence, harassment or discrimination. The overall goals of our work are to: (1) strengthen the movement for LGBTQ equity; (2) develop leaders who can organize others to work toward LGBTQ liberation; (3) win over the hearts and minds of Minnesotans.

Table A.1. Example of Changes in Organizational Mission Statements That Reflect Each Political Generation

1.5 Assessing Organizational Heterogeneity

We assess whether organizational focus, financial revenues, and wealth meaningfully alter the trends found in Figures 1, 2, and 3 in the main text. Despite the heterogeneity within LGBTQ+ nonprofits, we largely find consistent patterns in trends over time, showing that our observed trends indeed touch all types of organizations across the movement. The magnitude of these trends does vary, however, with advocacy-focused organizations and financially larger and wealthier organizations typically leading in adopting language associated with the Emergent generation. Future research is needed to fully theorize the characteristics of organizations that make them more or less inclined to adopt, resist, or ignore perspectives associated with one generation or the other in their formal documents such as mission statements.

Figure A.2 shows trends based on organizational focus: advocacy or service. We categorize organizations based on their National Taxonomy of Exempt Entities (NTEE) designation. The Internal Revenue Service designates nonprofits as one of 26 major NTEE codes based on their primary purpose and activities. We code all organizations in our sample with an “R” NTEE code to be “Advocacy,” as this code is meant to capture groups focused on “Civil Rights, Social Action, and Advocacy.” All other organizations are classified as “Service” and capture NTEE designations such as “Arts, Culture, Humanities,” “Education,” “Recreation and Sports,” or “Human Services.” Among our nonprofit-year sample, 23.6 percent are “Advocacy,” and the remaining 76.3 percent fall under “Service.”

Figure A.2 shows that “Trans/Queer+ Inclusive” language surpassed “LGB” language in prevalence for both types of organizations by 2005. Advocacy organizations, however, have a much faster growth rate and overall prevalence during this period. Both groups are nearly identical in their adoption of intersectional language—with advocacy groups typically just a percentage point or two ahead. The starkest difference in magnitude emerges when turning to different strategy frameworks. The trends from Figure 3 are largely driven by advocacy organizations. Service groups, however, still do experience a slow rise in transformative justice language—typically using a health equity framework. The differences in magnitude appearing most starkly in strategy is understandable considering that many organizations under “Service” may fundamentally have no reason to describe their mission through a civil rights frame. More research is needed to elucidate the key mechanisms driving these distinctions.

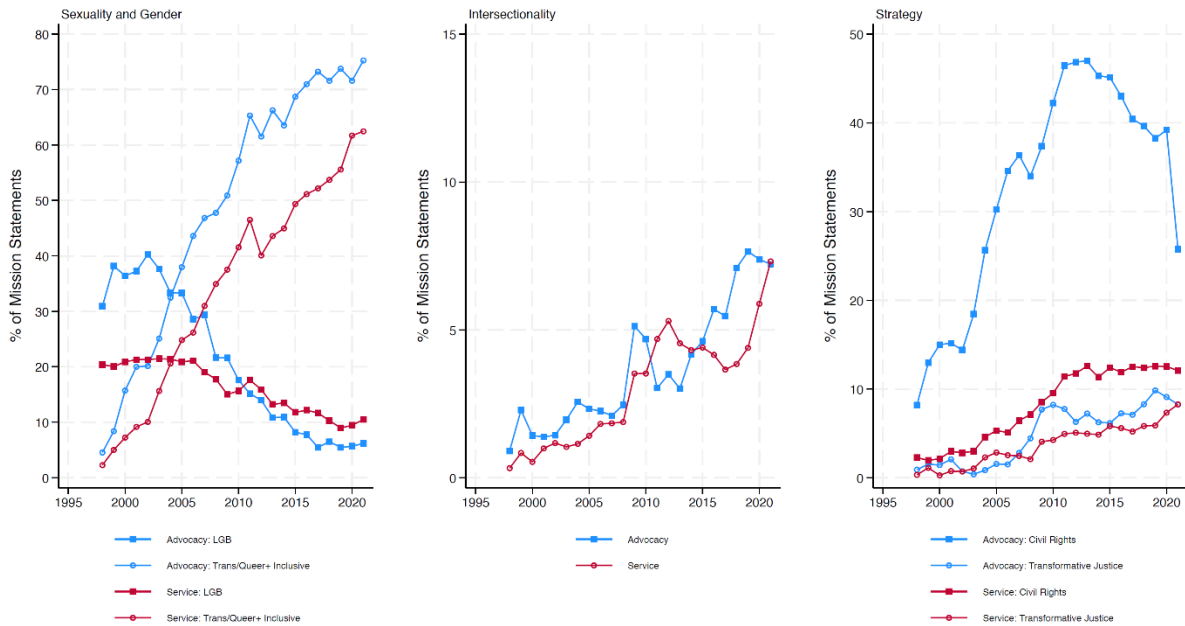


Figure A.2. Organizational Focus: Advocacy versus Service

Figure A.3 shows trends based on the financial size of the organization. We use annual revenues as reported on Form 990 to categorize organizations. Specifically, we divide our sample based on whether an organization, on average across all their tax filings, has above or below \$250,000 in revenues. This roughly approximates both the median point in the distribution and the IRS designation of \$200,000 in gross receipts necessary for a nonprofit to switch from filing a 990EZ to a full Form 990. This results in 46.4 percent of our sample as “<\$250K Revenues” and 53.6 percent of our sample as “>\$250K Revenues.”

Again, overall trajectories are similar in pattern but distinct in magnitude, as more financially larger organizations adopt language reflective of the Emergent generation. First, organizations across both revenue categories adopt “Trans/Queer+ Inclusive” language at near-identical patterns. Second, organizations with more than \$250,000 in average revenues adopted intersectional language at higher rates. While the two groups follow similar trends from 1998 through 2007, higher revenue groups dramatically adopt intersectional language following 2008. Both groups expand after 2017. Third, strategic trends are similar, but more pronounced in the higher revenue organizations. Indeed, projecting the trendlines suggest that by 2023, more high revenue organizations may use a transformative justice framework in lieu of one anchored in civil rights.

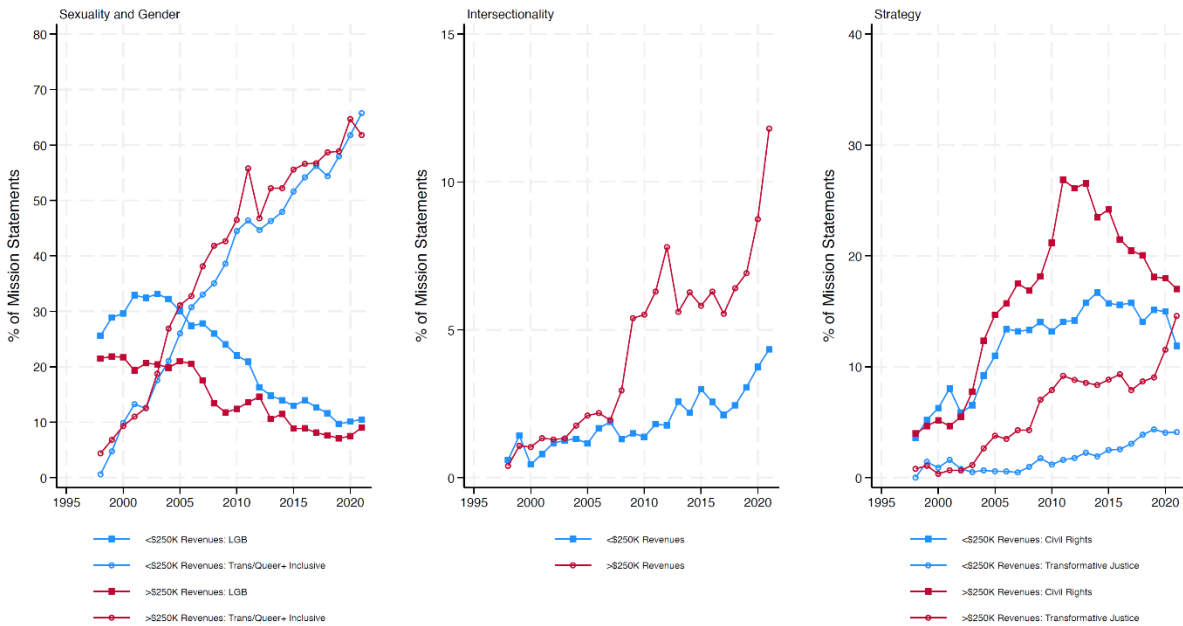


Figure A.3. Financial Size: Total Revenues

Figure A.4 shows trends based on the financial wealth of the organization. We use net assets as reported on Form 990 to categorize organizations. Net assets are calculated total assets minus total liabilities and are commonly used as an indicator of an organization’s financial wealth and stability. Similar to above, we divide our sample based on whether an organization, on average across all years, has above or below \$250,000 in net assets. This keeps consistency but produces a slightly lopsided sample: 64 percent of our sample is “<\$250K Assets” and 36 percent of our sample is “>\$250K Assets.”

Again, overall trajectories are similar in pattern but distinct in magnitude. Similar to above, wealthier organizations adopt language reflective of the Emergent generation at higher rates. First, changes in sexuality and gender-related language are near-identical across both sets of organizations. Second, organizations with more than \$250,000 in net assets adopted intersectional language at higher rates. The two groups follow similar trends from 1998 through 2007, but higher net asset groups dramatically adopt intersectional language following 2008. Both groups expand after 2017. Third, strategic trends are similar, but more pronounced in organizations with average net assets over \$250,000.

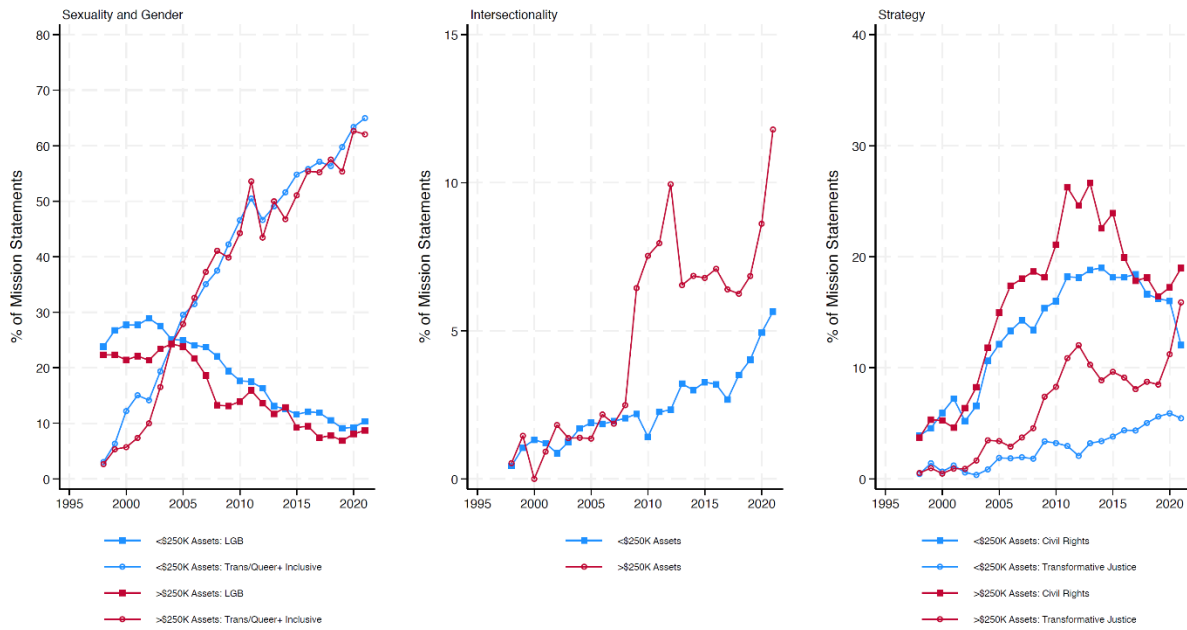


Figure A.4. Organizational Wealth: Net Assets