

NATIONAL TRENDS IN LGBT FUNDS AND THE COMMUNITY FOUNDATIONS THAT SUPPORT THEM

Applications for The LGBT Community Fund for Northeast Florida and The Community Foundation for Northeast Florida

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Introduction

In 2017, the LGBT Community Fund for Northeast Florida received a grant from Funders for LGBTQ Issues' Out in the South Initiative to support a community needs assessment and strategic planning process. (Funders for LGBTQ Issues, 2017) As part of the strategic planning process, research and the following report were commissioned to assist in analyzing LGBT funds throughout the United States. Research included funds affiliated with place-based community foundations and funds affiliated with independent LGBT community foundations, which house their own component funds including donor advised funds and endowed field-of-interest funds. Particular emphasis was given to leadership structure, division of labor, fund structure, sustainability, grant types, and fundraising strategies. This research serves as one of several resources for the LGBT Community Fund for Northeast Florida as it embarks on its 2018 strategic planning process.

A Strategic Planning Committee composed primarily of Steering Committee members of the LGBT Community Fund for Northeast Florida, and assisted by staff and independent consultants of The Community Foundation for Northeast Florida, will review the findings of this report in February of 2018. In addition to funds structured as giving circles, the Strategic Planning Committee will consider other models, including but not limited to, endowed field of interest funds and hybrid models that utilize multiple funding vehicles. The results of the *Jacksonville-Area Community Assessment Project*, a needs assessment conducted under the auspices of the Williams Institute, will also be reviewed in February.

The LGBT Community Fund for Northeast Florida was born from the appeal of Jeff Chartrand, a donor of The Community Foundation for Northeast Florida, for the Foundation to “explore the merits of creating a philanthropic fund to benefit the gay, lesbian, bisexual and transgender community in greater Jacksonville.” (Littlepage, Opportunities for GLBT Philanthropy in Jacksonville, 2011) A committee, entitled the GLBT Exploration Committee, was formed and comprised of 21 community

leaders, LGBT advocates, direct service providers, and volunteers. This Committee met over a 9-month period and their efforts resulted in a series of Early-Stage, Mid-Stage, and Mature-Stage recommendations. The GLBT Exploration Committee requested the Fund further explore needs of the LGBT community in four specific areas: Elders, Workplace, Youth and Families, and Communities of Faith. These reports were then used to shape the focus of the Fund's grantmaking. In 2014, the LGBT Community Fund for Northeast Florida launched as a giving circle hosted by The Community Foundation for Northeast Florida and it disbursed \$100,000 in its first grants cycle that same year.

Since 2014, the Fund has distributed more than \$475,000 in grants including \$158,000 distributed during the 2017 grant cycle. Grants have addressed areas of need in LGBT youth, families, elders, employees, students, and the nonprofit sector of Northeast Florida. Generally, grants range between \$10,000 and \$50,000. The Fund currently has 46 individual Members and though all donations to the Fund are welcome, only individuals making an annual gift of \$2,500 or more qualify as "Members" of the LGBT Community Fund for Northeast Florida's Giving Circle and are able to participate in the grantmaking process. Contributors under \$2,500 are recognized as "Supporters." There is substantial representation from individuals that identify as allies of the LGBT community in both the Members and Supporters categories.

Potential grantees are invited to submit applications through a negotiated grant process; a public Request for Proposal is not issued. Committees are comprised of Members (donors and volunteers) and staff members of The Community Foundation for Northeast Florida. The Fund is led by a Steering Committee and supported by a Leadership Committee, Grants Committee, and Membership Committee. A Strategic Planning Committee has also been formed for 2018.

The Strategic Planning Committee will review national trends found throughout LGBT funds around the United States, as outlined in this report, and consider the trends' potential applications for the LGBT Community Fund for Northeast Florida. In order to initiate the strategic planning process, a SWOT Analysis examining the LGBT Community Fund for Northeast Florida and The

Community Foundation for Northeast Florida will also be conducted following the findings regarding national trends. The SWOT Analysis will assist the Strategic Planning Committee in identifying the Strengths, Weaknesses, Opportunities, and Threats of the Fund based on the research findings and observations of the Fund to date. Portions of the SWOT Analysis will remain internal documents. Finally, impressions and recommendations from the researcher and author are given for the Strategic Planning Committee's consideration.

Research Methods

Research was initially guided by fund lists provided by multiple sources including: Nina Waters, President of The Community Foundation for Northeast Florida; Chantelle Fisher-Borne, Program Director of the Out in the South Initiative of Funders for LGBTQ Issues; and Out in the South's 2016 and 2017 grantee lists. Additional funds were added to the investigation by the researcher based on referrals from other LGBT fund staff members or research findings. In total, thirty funds spanning twenty-three states were researched to varying degrees as part of this investigation.

Initially, research was conducted through an online investigation of fund and foundation websites, as well as published materials such as reports, brochures, press releases, and independent media publications. As funds were added, research was customarily followed, as appropriate and required, by emails and phone calls with representatives for each fund. Correspondence between the researcher and respective LGBT funds was primarily with staff members of the community foundations housing the funds. At times, these staff members were also members and donors of the funds in question. On occasion, this correspondence was with the current volunteer officer leading the fund. A portion of the funds were unable to participate in conversations due to time constraints or a lack of response. Finally, in some cases, it was determined by the researcher to be unnecessary to conduct further follow-up at that time for the purposes of this report. A comprehensive list of funds

and, if applicable, their accompanying community foundations, locations, websites, representatives, contact details, and a document resource list are attached to this report.

For the purposes of this report, the acronym LGBT (Lesbian, Gay, Bisexual, Transgender) will be used throughout, unless referring to a specific entity that includes a different title. This decision was made in order to reflect the name of the fund for which the research was commissioned, the LGBT Community Fund for Northeast Florida. It is not intended to exclude considerations and applications for any members of the LGBTQIAAP community (Lesbian, Gay, Bisexual, Transgender, Queer or Questioning, Intersex, Asexual, Allies, and Pansexual). Of note, GLAAD's 2016 Media Reference Guide recommends the use of the acronym LGBTQ (Lesbian, Gay, Bisexual, Transgender, Queer or Questioning), a shift from the GLAAD'S 2010 Media Reference Guide which recommended the acronym LGBT. (GLAAD, 2010; GLAAD, 2016)

Trends

At the outset of this investigation, it was the researcher's intent to organize this report by fund structures; however, as research progressed it became evident that such a narrow classification would limit findings. Numerous trends were cited by funds throughout the country regardless of their funding structure. Generally, three models emerged: Giving Circles, Donor Advised Funds, and Endowed Field of Interest Funds. At times, multiple models were found to be working in conjunction with one another. These funding structures are further addressed throughout this report, specifically in pages 25-30.

As a result of the fund structure findings, and in order to convey a more comprehensive scope of research, this report is organized largely by delineating trends found throughout various funding models. Some trends may be applicable to the LGBT Community Fund for Northeast Florida, while others may not. Trends in the following areas are examined: Place-Based Community Foundations

vs. Independent LGBT Community Foundations; Leadership, Staffing, and Structure; Funding for Operating Expenses; Grantmaking; Funding Structures; and Fundraising Strategies and Considerations for Sustainability.

Place-Based Community Foundations vs. Independent LGBT Community Foundations

The LGBT Community Fund for Northeast Florida is administered by a place-based community foundation serving Northeast Florida. The Community Foundation for Northeast Florida closed 2017 with more than \$398 million in assets, \$37.6 million in grants distributed in 2017, and 545 funds. As previously referenced, both funds at place-based community foundations and independent LGBT community foundations were found during the investigation. One example of an independent LGBT community foundation is the Horizons Foundation in San Francisco. Horizons Foundation became the first independent LGBT community foundation in the country in 1988 and is described as “a community-based foundation to support the whole spectrum of LGBTQ organizations — a foundation that was of, by, and for LGBTQ people.” (Horizons Foundation, n.d., Our History) Per Horizons Foundation’s 2016 Annual Report, in 2016 alone, the organization granted over \$3 million and served as home to more than ninety donor advised funds and the LGBTQ Community Endowment. (Horizons Foundation, 2016)

Predominantly positive feedback regarding LGBT fund partnerships with local community foundations resulted from all research inquiries. Community foundations’ trusted reputation throughout the communities they served was the chief rationale cited for this positive sentiment. Similar to The Community Foundation for Northeast Florida, other place-based community foundations have deep roots in their communities and a track record of fiscal responsibility, due diligence, and relationship building. The admiration for, capacity, and expertise of these community foundations has been critical to getting LGBT funds off the ground. The reasons cited in the LGBT Community Fund for Northeast Florida’s *Growing LGBT Philanthropy in Partnership with Community*

Foundations: A Report to the Field (Littlepage, 2014) and *Constituent Perceptions and Comments* report (Littlepage, 2017) track nearly identically to the reasons cited for similar partnerships across the country. (Littlepage, *Constituent Perceptions and Comments*, 2017; Littlepage, *Growing LGBT Philanthropy in Partnership with Community Foundations: A Report to the Field*, 2014) Specifically, the following benefits of partnering with community foundations were cited at the inception of the LGBT Community Fund for Northeast Florida: community foundations know how to do the work; most community foundations are donor-focused; community foundations typically have extensive networks within a community; community foundations make good conveners; community foundations have built-in philanthropic infrastructure with credibility, reliability and accountability; and community foundations have a strong national network. (Littlepage, *Growing LGBT Philanthropy in Partnership with Community Foundations: A Report to the Field*, 2014)

In the case of the Samara Fund of the Vermont Community Foundation, the incorporation of the Fund into a place-based community foundation resulted, in part, from donor concerns regarding high expenditures on staffing instead of grantmaking. According to the Vermont Community Foundation, the Samara Foundation of Vermont was founded in 1992 and “was established as a nonprofit corporation and operated until 1998 as the Human Rights Foundation of Vermont. In 2011, the Samara Foundation joined in partnership with the Vermont Community Foundation to build the capacity of both organizations to provide excellent donor and grantee services to Vermont’s LGBTQ communities.” (Vermont Community Foundation, n.d.) Originally, the Samara Fund employed its own fulltime Executive Director. The Vermont Community Foundation cited a “schism” between staff and donors regarding the intent of the funding, with donors concerned that the assets of the Fund were being spent down on staff costs and “movement building.” Merging with the Vermont Community Foundation drastically reduced staff costs and allowed the Samara Fund to increase their grantmaking.

In cases where funds are part of an independent LGBT community foundation, such as the Horizons Foundation and Our Fund Foundation, regional demographics must be taken into consideration. The Bay Area and Broward County are homes to disproportionately high numbers of LGBT individuals and families; thus, what is both sustainable and required in those regions is not necessarily in others. It was discovered that these communities are able to sustain funds both under the umbrella of traditional, place-based community foundations in these areas, such as the Gay and Lesbian Broward Community Fund of the Community Foundation of Broward, and in standalone LGBT community foundations, such as Our Fund Foundation which is also located in Broward County.

The Community Foundation of Broward commented that Our Fund Foundation was founded by a previous staff member of The Community Foundation of Broward and that the organizations don't work in silos. The CEO and President of Our Fund Foundation was recently involved in focus groups for the Gay and Lesbian Broward Community Fund of the Community Foundation of Broward. The Community Foundation of Broward further observed that their place-based organization has the capacity to fully support the varied interests of their LGBT donors, while simultaneously supporting the LGBT community throughout all of their foundation's grantmaking.

Leadership, Staffing, and Structure

The exact leadership and staffing structures of LGBT funds varied significantly. Most funds consist of a steering committee that leads subcommittees and partners with staff. Titles for the volunteer groups associated with the funds varied, but for the purposes of this report are referred to as steering committees unless referencing a specific fund. Feedback was split regarding the workload shared by these groups, and that data does not divide with clean lines. Community foundations and steering committees with a tenable sharing of responsibilities are located in both older and younger funds. The composition and leadership pathways of these steering committees were found to have

additional implications for fund sustainability and thus trends in diversity and succession planning were also explored.

Relationships between Volunteers and Staff

The Charlotte Lesbian and Gay Fund of Foundation for the Carolinas stood out as one enviable example of an organization with a successfully implemented volunteer and staffing structure. The Fund launched in 2003 with help from the National Lesbian and Gay Community Funding Partnership. Foundation for the Carolinas gradually and successfully shifted much of the workload from staff to a trusted volunteer Board of Advisors. At the outset of The Charlotte Gay and Lesbian Fund, staff at Foundation for the Carolinas took on the lion's share of the work. However, as time passed, the volunteer Board of Advisors became a diverse and healthy working board requiring less assistance from staff. Board members meet monthly and have committees that serve underneath them. They are responsible for the bulk of fundraising and donor solicitation, in conjunction with the Foundation. The Board's members are also responsible for individual thank you notes, organizing donor events, hosting a grants review committee, formulating agendas, and sending out meeting reminders. In addition, the Board organizes an annual event, called The Happening, which raises over \$75,000, hosts over 800 attendees, and pays the operating expenses of the Fund.

In a few instances, workload between staff and volunteers involve ambiguous delineations because the community foundation's designated staff member identifies as LGBT and is heavily involved with the respective fund on a personal level. Such is the case at Community Foundation Sonoma County, where the Vice President for Philanthropic Planning promised to do staff work on his own time in order to host their Sonoma County LGBTQI Giving Circle Fund of Community Foundation Sonoma County. Rochester Area Community Foundation's LGBT Giving Circle also has a staff member that is involved both as staff and as a LGBT Giving Circle member.

In the case of other funds, the staffing required from the associated community foundations is not sustainable in its current form. To become sustainable, these funds require that additional responsibilities shift to volunteers and stable funding sources that provide operating funds, such as appropriately sized endowments, be secured. Due to the fiscal responsibility these community foundations owe to their donors, these transferals have often been frustratingly, but necessarily, slow. Despite the sluggish shift, community foundation staff, funders, and volunteers are generally aligned in their understanding that this shift must happen. Both the Community Foundation of Greater Birmingham and the Greater New Orleans Foundation, for example, are currently working with their funds to develop more sustainable models in which it's "not such a heavy lift" for the staff. Volunteer appreciation of the critical difference between fundraising and friendraising was often cited by funds as a concern.

The LGBT Community Fund for Northeast Florida is supported by several staff members of The Community Foundation for Northeast Florida. Lead staff member, Christina Fleck, is the Fund's primary staff support, and the President, Nina Waters, takes a significant role in both the Steering Committee and the Membership Committee. Emmanuel Fortune, Program Director, assists on the Grants Committee and the Fund also enjoys the support of Finance and Communications staff members as appropriate. The sustainability of such robust staff support in the Fund's current structure is an ongoing challenge.

Community foundations, while often struggling to staff the endeavors of their LGBT funds, are largely positive about the partnerships. Most representatives state that the work is part of the mission of their organization and that it makes their organizations more knowledgeable about the communities in which they live and serve. There is a common acknowledgement that while these funds are often younger, highly nuanced, and still being shaped into sustainable models for all parties, that the commitment to achieve sustainability indeed exists in all parties.

Committees

Steering committees are generally found to be comprised of two to five subcommittees. These subcommittees almost always include grants committees. Examples of other subcommittees included, but are not limited to: development, education & outreach, membership, public relations, finance, events, and scholarship committees. The LGBT Community Fund for Northeast Florida has a similar structure to many funds as it is also led by a Steering Committee and supported by subcommittees including a Leadership Committee, Grants Committee, Membership Committee, and a 2018 Strategic Planning Committee. It was generally observed that volunteers for the LGBT Community Fund for Northeast Florida take on less work in the area of event management and general planning and communications than volunteers of comparable funds.

Diversity

Most funds cite a need to diversify their steering committees in order to be more inclusive of the communities and grantees they serve. Funds have largely been founded by older white gay males and steering committees have intentionally worked to shift their composition to be more inclusive of other members of the LGBT community. Specifically, struggles with recruiting and retaining individuals that identify as transgender, a racial minority, and/or an ethnic minority are cited by funds throughout the nation. The HOPE (Helping Other through Partnerships and Education) Fund of The Community Foundation for Southeast Michigan found that a report, *The Future of The Hope Fund*, commissioned from Rockefeller Philanthropy Advisors reaffirmed their need to diversify for sustainability. Funds such as the HOPE Fund and The Charlotte Lesbian and Gay Fund have made progress in diversifying with support from older white gay males cognizant of this need to more aptly reflect the composition of the entire LGBT community and its supporters.

Despite intentions and efforts to diversify, many funds continue to struggle and are still devising plans to make their steering committees more diverse. Sonoma County LGBTQI Giving Circle Fund of

Community Foundation Sonoma County, for example, launched a “Strategic Advisor Pilot Program” in an attempt to acknowledge that they did not have “all of the voices at the table.” Prospects were invited to send “applications for two separate Strategic Advisors to advise the Steering Committee from their unique perspectives as LGBTQI members of 1. the gender non-conforming community and 2. a community that experiences racism.” (Sonoma County LGBTQI Giving Circle Fund of Community Foundation Sonoma County, 2016) These positions were filled by qualified candidates; however, at the end of their respective terms, neither Strategic Advisor opted to join the Steering Committee despite being extended invitations. The LGBT Community Fund for Northeast Florida has also largely been led by white, gay males and has not experienced sustained representation on its Steering Committee from the transgendered community.

Socioeconomic factors also created barriers to diverse steering committees, particularly in giving circle models. The LGBT Fund for Greater Rochester of Rochester Area Community Foundation noted that some of the Giving Circle’s most engaged members are those that struggle to reach the \$250 price point to join. Sonoma County LGBTQI Giving Circle Fund’s Strategic Advisor Program provided a \$500 honorarium with which Strategic Advisors could pay for Giving Circle membership during their year of service. The LGBT Community Fund for Northeast Florida’s Steering Committee also includes two At-Large positions, which allow for inclusion from LGBT community stakeholders that may be unable to meet the financial commitment otherwise required to join as a member of the Fund’s Giving Circle.

Succession Planning

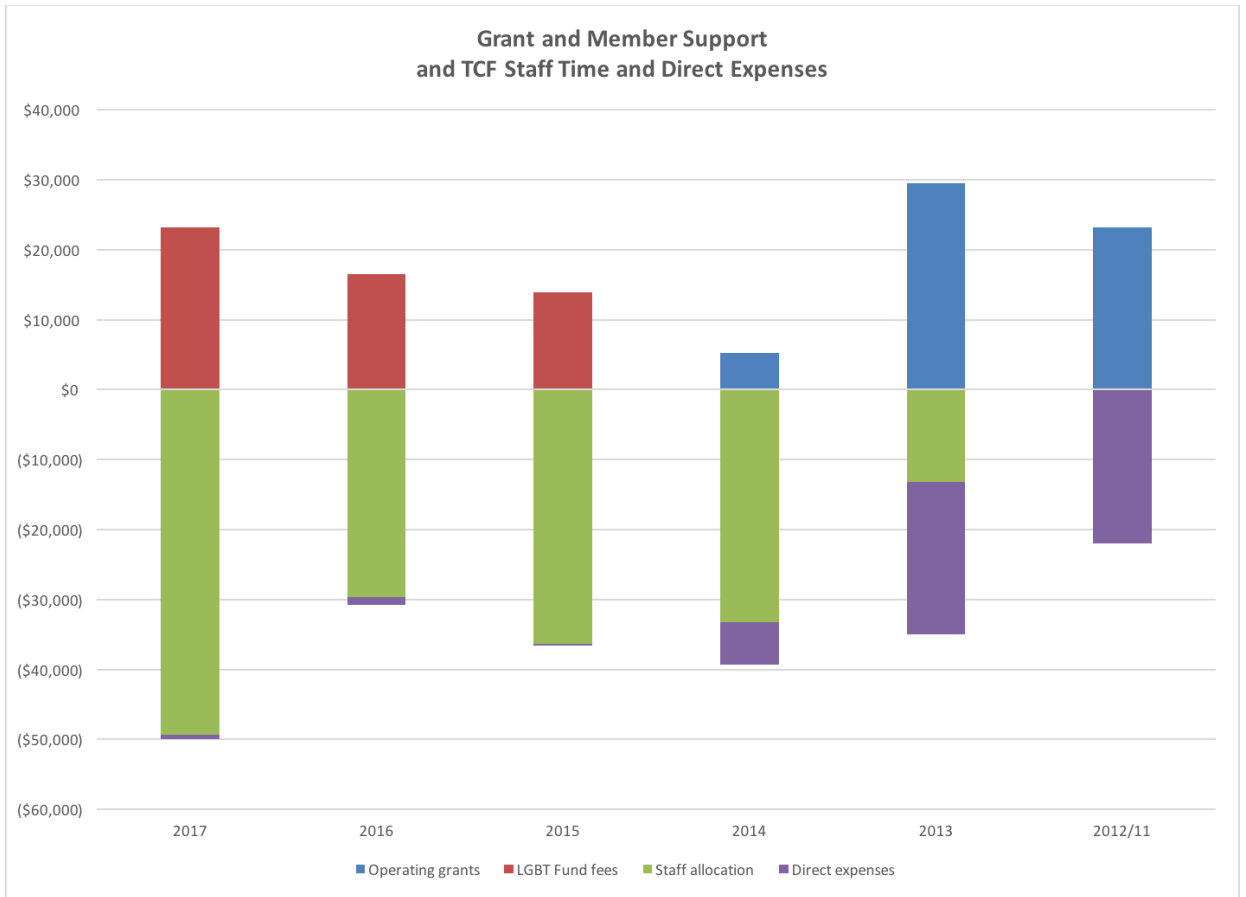
Finally, succession planning is on the agenda for several funds that have enjoyed stable leadership for several years. JustFundKY of the Bluegrass Community Foundation, led by Ernesto Scorsone, a member of the House of Representatives from 1984-1996, current Fayette Circuit Court Judge, and founder of JustFundKY, is an example. This is also true for the LGBTQI Giving Circle of

Community Foundation Sonoma County, where J Mullineaux, Vice President of Philanthropic Planning, serves as Founder and Steering Committee member in addition to serving as the Fund's designated staff member. The findings of the focus groups at the LGBT Community Fund for Northeast Florida touched on this as well, citing that volunteer burnout was a concern, a new generation of Steering Committee members is not readily apparent on the horizon, and that, "We have been blessed to have Michael Meyers but he won't be there forever." (Littlepage, Constituent Perceptions and Comments, 2017)

Funding for Operating Expenses

Overall, there does not appear to be a consistent method across funds through which operating expenses are paid for. In some cases, fees are assessed to the income from membership fees and other donations. In other cases, fees are assessed on the balance of the endowed fund. In other cases, operating costs are, in part, paid for through operating grants or fundraising events. In many cases, place-based community foundations assess reduced rates to their LGBT funds, especially in cases where the fund is less than five years old. Fee structures also vary based on the type of fund; permanent funds and pass-through funds are not charged in the same manner or at the same rate.

At The Community Foundation for Northeast Florida, currently all monies coming into the LGBT Community Fund for Northeast Florida, which is currently a giving circle model and a pass-through fund, are charged 10%. Therefore, a \$2,500 donation, the annual cost of joining as a voting member of the Giving Circle, is assessed a fee of \$250 to assist with operational costs. Furthermore, The Community Foundation for Northeast Florida has underwritten additional expenses for the Fund since 2011. Between the years of 2015-2017, these underwritten expenses averaged \$21,282.



Fee Structures

Many community foundations said that their LGBT funds enjoy reduced or donated fee structures. The Greater New Orleans Foundation, for example, currently assesses no fees to The LGBT Fund of the Greater New Orleans Foundation; however, it does not appear that this is a sustainable model for the Foundation longterm. Community Foundation of Greater Birmingham assesses their minimum fee rates of 1.15% for The LGBTQ Fund’s endowed fund and 2% for its pass-through fund. Community Foundation Sonoma County assesses their minimum fee rate of 1.5% monthly on the assets of the LGBTQI Giving Circle. Foundation for the Carolinas assesses a flat fee for the services they provide the Charlotte Lesbian and Gay Fund (as outlined in an Agreement for Services document), and the Fund also pays “investment manager and investment-related expenses which are

passed through.” However, Foundation for the Carolinas was unable to share the precise fees as the Foundation’s policies prohibit sharing fees that are not standard.

Operating Grants

Operating grants are an integral part of financing for funds across the nation. The Chicago Trust’s LGBT Community Fund received operating support in the form of a grant from a separate fund of The Chicago Trust, The Elizabeth Morse Charitable Fund. The Elizabeth Morse Charitable Fund’s advisor was also integral to the creation and success of the LGBT Community Fund and has served on the Fund’s Steering Committee. Of note, a grant that assists in sustaining operating support was recently cited again as a possibility by an LGBT Community Fund for Northeast Florida constituent and the LGBT Community Fund for Northeast Florida successfully secured two operating grants from Funders for LGBTQ Issues in 2016 and 2017. (Funders for LGBTQ Issues, 2017; Littlepage, Constituent Perceptions and Comments, 2017) Funders for LGBTQ Issues have supported many funds across the country with operating grants. Specifically, in the South, Funders for LGBTQ Issues’ Out in the South initiative aims to “increase the scale and impact of foundation funding for LGBTQ communities in the U.S. South” through multiple strategies, including providing “planning grants, matching funds, and technical assistance to stimulate the creation and growth of local LGBTQ funds and Southern funding collaboratives across the South.” (Funders for LGBTQ Issues, 2018)

Operating Expense Fundraising

As previously mentioned, The Charlotte Lesbian and Gay Fund at Foundation for the Carolinas holds an annual luncheon, The Happening, to raise operating revenue that is directed toward an Operating Fund. The Operating Fund was created, in part, out of a desire to commit to stakeholders that 100% of their investment is directed toward grantmaking. This event typically raises over \$75,000 and through the event the Charlotte Lesbian and Gay Fund benefits from corporate

donations by way of sponsorships and ticket sales. The Operating Fund's primary expense is The Happening event itself, which costs between \$35,000-\$45,000. However, other fundraising and donor appreciation events are also paid for through this fund. On occasion, funds from the Operating Fund also spill over into their Grantmaking Fund. Furthermore, The Happening serves as the venue through which annual grant awards are announced, therefore supporting the needs of its other funds. It is estimated that approximately 30 additional funders are retained through this event annually.

Foundation for the Carolinas reports that the event is beloved by the staff, volunteers, and community. Of note, Foundation for the Carolinas has a robust staff including designated staff for event planning; however, this staff's resources are not required for the event. Past luncheons have included video presentations and speakers. With an attendance of over 800 individuals and participation from the business community, this event also serves important promotional purposes for the Charlotte Lesbian and Gay Fund.

Grantmaking

Needs Assessments

Needs assessments were found to be regularly employed by funds throughout the country in order to drive the direction of their grantmaking. Though some funds reported that they determined areas of grant focus based on informal reporting from their constituents, most had undergone at least one needs assessment and several were in the process of conducting additional needs assessments. For example, Birmingham recently followed their original needs assessment with a second, smaller needs assessment focusing on the transgendered community. The Texas Pride Impact Fund, The Equality Fund of The Boston Foundation, The LGBT Fund of Mississippi of The Community Foundation for Greater Jackson, and the Samara Fund of The Vermont Community Foundation are some of the funds that have commissioned needs assessments in the last 24 months. As previously cited, The Community Foundation for Northeast Florida and the LGBT Community Fund for

Northeast Florida commissioned the *Jacksonville-Area Community Assessment Project* in 2017. This assessment survey will “provide new information on the composition, experiences, and needs of the LGBT community in Jacksonville, Florida to help service organizations and policy makers better serve the diverse LGBT community.” (Memorandum of Understanding between The Community Foundation for Northeast Florida, Inc. and the University of California, Los Angeles, 2017)

Request for Proposals and Grant Categories

Research found that the LGBT Community Fund for Northeast Florida is somewhat unique in its strategy of only engaging in a negotiated grants process. While the LGBT Community Fund for Northeast Florida does set aside \$10,000 for “unforeseen opportunities,” including emerging small grant requests, it does not offer a standardized process for requesting such opportunities. Largely, funds across the nation engage in a competitive grantmaking process, issuing a Request for Proposal (RFP) more broadly and thus receiving grant requests from a higher number of organizations. While not all requests are selected, or fully funded, a RFP process assists funds in becoming more fully aware of the work being done in their communities by allowing new projects and organizations to come to their attention. Generally speaking, funds tend to make a higher number of smaller grants than the LGBT Community Fund for Northeast Florida, with grant ranges often beginning at \$500-\$1,000, even in cases where overall funding capacity is similar.

Many funds have more than one type of grant offering in order to support well-established organizations, organizations in their infancy, and/or to separate operating, program, projects, and event funding. Though several variations were found, a fairly representative example of this trend is the Charlotte Lesbian and Gay Fund of Foundation for the Carolinas which offers “Programs, Projects, and Events Grants,” “Basic Operating Grants,” and “Grassroots Lane Grants.” (Foundation for the Carolinas, 2018)

Grant Focuses

Common grantmaking focuses at the LGBT Community Fund for Northeast Florida and across the nation are LGBT youth, elders, and families, as well as capacity building for LGBT serving organizations and cultural competency building of “mainstream” organizations. Rarely did a fund not specifically support these areas of focus. Institutions of faith and the workplace were less commonly found as stated areas of focus.

The LGBT Fund of The Greater New Orleans Foundation is one example of a fund placing emphasis on mainstream organizations. The Fund’s Grant Guideline’s document states, in part, “This work will provide the staff of ‘mainstream’ organizations with the education, tools, and professional development opportunities that will help improve their knowledge, skills, and attitudes when serving LGBT clientele.” (The Greater New Orleans Foundation, 2017) The LGBT Community Fund for Northeast Florida has engaged in similar work on several occasions, including through grants to the ElderSource Institute to provide LGBT Elder Cultural Competency Training to professionals serving elders in home health agencies, senior public housing, assisted living facilities, and skilled nursing facilities in Northeast Florida.

Grants specifically geared towards collaboration between organizations serving the LGBT community are also found in many funds. The LGBT Community Fund of The Chicago Community Trust, for example, spent an entire funding cycle focused on what they termed “Transformational Grants” in which each grant supported “a deeply-rooted collaboration between two organizations dedicated to meeting health and human services needs for lesbian, gay, bisexual and transgender individuals in the Chicago region.” (The Chicago Community Trust, 2016) The LGBTQ Fund of Community Foundation of Greater Birmingham also focuses on grants that “advance collaboration between LGBTQ organizations and other community organizations.” (Community Foundation of Greater Birmingham, 2017)

Public policy and social justice causes are also focuses of many funds including, but not limited to, the LGBTQ Fund of The Community Foundation for Greater Birmingham, The Equality Fund of The Boston Foundation, and Southerners on New Ground. The Boston Foundation's Director of External Communications, Ted McEnroe, has previously commented that, "The Boston Foundation in general has pursued what we call a civic leadership model for a number of years, making ourselves a little different from other community foundations" and that the Foundation engages in advocacy "policy issues when it seems appropriate." (Bolder Advocacy, 2013) The LGBTQ Fund of Community Foundation of Greater Birmingham supports, "nonprofit partners working on public policy and social justice issues that intersect with LGBTQ concerns." Southerners on New Ground's work focuses exclusively on social justice. While this organization's work is critical, its mission is fundamentally different than that of the LGBT Community Foundation for Northeast Florida and consequently it was not further researched for the purposes of this report.

Several funds supported scholarships in addition to their other grants, and often separate grant committees supported these processes. Funds that support scholarships include, but are not limited to, The Samara Fund of the Vermont Community Foundation, The Whidbey Giving Circle (WGC) of the Pride Foundation, and The LGBTQ Fund of Community Foundation of Greater Birmingham. Some funds exclude scholarships from consideration.

In sum, in comparison to the LGBT Community Fund for Northeast Florida, funds across the nation tend to make higher numbers of grants, in lower amounts, and with less emphasis on direct services and capacity building. Grant ranges often begin between \$500-\$1,500 but end anywhere between \$2,000 (OUT Miami) to \$100,000 (Gay and Lesbian Broward Community Fund of the Community Foundation of Broward).

Grant Ranges

Fund	Foundation	Year	Total Grants	Grant Range	Number of Grants
Charlotte Lesbian & Gay Fund	Foundation for the Carolinas	2017	\$135,000	\$1,500-\$25,000	22
LGBT Fund	Greater New Orleans Foundation	2017	\$99,000	\$1,000-\$10,000	14
Equity Action	Rhode Island Foundation	2017	\$60,000	\$5,000-\$10,000	8
The Samara Fund	The Vermont Community Foundation	2017	\$65,000	\$500-\$4,500	23
The Equality Fund	The Boston Foundation	2016	\$88,000	\$4,100-\$14,000	11
The LGBT Community Fund for Northeast Florida	The Community Foundation for Northeast Florida	2017	\$158,000	\$10,000-\$50,000	10

Grants from Around the Nation

- Charlotte Lesbian and Gay Fund; Foundation for the Carolinas
 - \$2,700 for the Charlotte Royals Rugby Football Team's (a gay men's rugby team) Queen City tournament
- Samara Fund; Vermont Community Foundation
 - \$4,500 to support the Vermont Stage Company's production of FUN HOME, a musical about a young lesbian based on Alison Bechdel's best-selling graphic novel
- LGBT Fund; Greater New Orleans Foundation
 - \$10,000 grant to BlaQ Ballet to create and execute performance based art for black LGBT youth
- LGBT Community Fund; The Chicago Community Trust
 - Thousand Waves Martial Arts & Self-Defense Center to develop intensive training workshops in violence prevention and self-defense for LGBTQ youth experiencing homelessness
- The LGBTQ Community Endowment Fund; Community Foundation of Utah
 - U of U College of Health- Department of Communication Sciences and Disorders, University of Utah Speech-Language Hearing Clinic for Giving Voice to the Person Inside: A Voice Therapy Program for Persons in Transition
- The Boston Foundation
 - \$14,000 to support GLBTQ Legal Advocates & Defenders (GLAD)'s Improving Conditions and Healthcare Access for Transgender Prisoners initiative, which is working to develop a sustainable solution to the issue of transgender prisoner discrimination

LGBT Funding throughout all Community Foundation Grantmaking

Several community foundation employees spoke passionately about their resolve to support LGBT-related projects throughout grantmaking in all field of interest funds and through other forms of discretionary giving. Two examples of community foundations making intentional efforts to support their LGBT communities throughout all of their work are the Community Foundation of Broward and The Cleveland Foundation. The Community Foundation of Broward cited the following grants, all which came from outside of their LGBT field of interest funds: Broward County HSD/CPD/Ryan White Part A Program – Peer Counselor Certification Initiative; Covenant House Florida – Youth Employment Services; World AIDS Museum – Never Again!; and Slow Burn – Intergenerational Gay Straight Alliance Acting Workshop.

The Cleveland Foundation uses its Gay Games Legacy Fund to supplement funding that the LGBT community already has access to throughout the entire organization. It was considered critical that the LGBT community, and their funding needs, were not marginalized by the creation of the Gay Games Legacy Fund. This fund was created as a result of Cleveland hosting the 2014 Gay Games, an Olympics-style event with sporting and cultural events that welcomes more than 10,000 LGBTQ athletes, artists, and activists representing over 60 nations. (Gay Games, 2014) The Gay Games Legacy Fund's resources may only be used to support the LGBT community, but it does not issue its own RFP and any grants would be considered supplemental to the organization's other community response dollars. In fact, Kristi Andrasik, Program Officer of The Cleveland Foundation, reports that the Foundation made \$470,000 in grants to the LGBT community through its discretionary community response dollars and that no grants have been issued from the Gay Games Legacy Fund to-date as they are still hoping to grow the fund, which she believes currently has under \$200,000.

Funding Structures

As previously cited, three models emerged as funding structures during the investigation: Giving Circles, Committee-Advised Funds, and Endowed Field of Interest Funds. Many community foundations utilized more than one of these models in their funding strategy. Occasionally, multi-year commitments were utilized as part of those funding structures and, for that reason, multi-year commitments are considered first.

Multi-Year Commitments

Multi-year giving structures emerged as common strategies at the outset of fund development, but not as a continued strategy. For example, the LGBTQ Fund of the Community Foundation of Greater Birmingham cited use of multi-year commitments “in the early days,” but has since directed focus toward maximizing annual giving that is eligible for matching funds just as the LGBT Community Fund of The Community Foundation for Northeast Florida has done. Overall, ongoing multi-year models were a rarity and considered somewhat unsustainable by funds that had previously used them. Staff mentioned that this strategy created a dynamic in which less funders viewed their donation as a portion of their annual gift portfolio. Negative perceptions of multi-year giving structures and strategies were also noted by members of the LGBT Community Fund for Northeast Florida. As an anonymous donor commented, “Giving is fun and exciting, but when you have a multi-year pledge it feels like an obligation in the out years instead of a choice. It’s never as much fun to write the second or third check as it is the first, and I’m always really glad to be done with it.” (Littlepage, *Constituent Perceptions and Comments*, 2017)

Committee-Advised Funds

Committee-advised funds, a type of donor-advised fund, were found at various community foundations. At times, these funds are the sole funding structure and at times they are a single part of a web of funding structures. For instance, The Samara Fund of The Vermont Community Foundation receives funding from a committee-advised fund, distributed from the estate of Robert Mundstock, as well as an endowed fund, the Douglas C. Howe and Frank E. Shivers Trust, of which The Samara Fund is designated as the advisor. The LGBT Fund of The Spartanburg County Foundation is also a committee-advised fund, originally established by a single donor, and is led by a committee of five advisors.

Giving Circles

Research found that the LGBT Community Fund for Northeast Florida, which is considered a giving circle, employs a higher price member point than many of its peers. As previously cited, the Fund currently has 46 individual members and though all donations to the Fund are welcome, only individuals making an annual gift of \$2,500 or more qualify as members of the Giving Circle and are able to participate in the grantmaking process. Other funds across the country have started with higher price points and then voted to reduce them in order to grow their membership. The Sonoma County LGBTQI Giving Circle Fund of Community Foundation Sonoma County, which has 98 members, began with a flat \$500 per individual price point before transitioning to an expanded membership offering range between \$250-\$1,000. The Fund does not offer any distinctions between membership levels and everyone is treated the same. The LGBT Fund for Greater Rochester, which also cites 100 members, lowered their minimum required donation for voting membership to \$250 per household, after first attempting to sustain membership with a price point of \$1,000 per household. Suggested giving levels of \$250, \$500, and \$1,000 are published as an option to encourage donors to continue giving at their maximum capacity, though they do not publish the ranges that their

donors fall within and there are no variations in benefits. Our Sarasota Fund Giving Circle of Community Foundation of Sarasota County, which currently has thirty members, requires members to contribute just \$100.

The Charlotte Gay and Lesbian Fund of Foundation for the Carolinas has 85 individual donors but a membership of 126 due to “household” memberships offerings. This Fund offers a “stakeholder” voting membership for \$1,000 per household and has also created a \$500 opportunity for donors under the age of 30. However, they have had success also offering higher price point memberships through “stakeholder plus” and “founder” commitment levels. At these higher levels, a portion of the donation is directed towards their endowed fund.

Giving Circle Considerations

Research has shown that the more engaged giving circle members are, the more likely they are to increase their charitable donations to the giving circle, most especially if they serve on grantmaking committees. According to Bearman and Eikenberry (2009), “members who mainly participate in deciding who receives funding give, on average, more in total household contributions than members who, for instance, mainly volunteer or attend social events or educational sessions through the giving circle.” One study showed that formal giving circles, which includes the LGBT Community Fund’s giving circle, are nearly evenly split on providing volunteer opportunities for giving circle members to participate in with grantees. (Eikenberry A. M., 2009) Such activities may serve to increase member engagement.

One concern of continuing in a giving circle model without compelling member engagement is the barrier that is placed between direct service organizations and other grantees and giving circle members. Unless the member has strong prior relationships with grantee organizations, it is likely that the member is considered “off limits” by the grantees. This is of particular concern if the giving circle members are LGBT leaders in the community and would otherwise be high prospect donors. The perceptions of giving circle grantees regarding their ability to cultivate relationships with giving circle members bear further consideration.

Another consideration is that giving circle models are often most effective when attracting participants that are younger or are relatively new to philanthropy. (Eikenberry, 2005) When a giving circle also carries a high price point, this benefit may be reduced. Educational opportunities are an essential value-add for any giving circle. But if the giving circle is targeting already refined and experienced donors, knowledgeable about the community they serve, with a high financial capacity for giving and a low interest for regular direct engagement, is a giving circle the most effective model for serving these donors?

The Constituent Perceptions report findings touches on many of these considerations. (Littlepage, Constituent Perceptions and Comments, 2017) It was noted that the power of giving collectively was a high point for donors and that donors enjoy the social and educational components of the giving circle. However, the low engagement in the survey and the concerns regarding a giving circle model from those that did participate require serious consideration. A giving circle also runs the risk of both pricing out highly engaged individuals and not maximizing the financial capacity of lead donors by setting a price point which attempts to find a middle ground.

Endowed Field of Interest Funds

The LGBT Community Fund for Northeast Florida does not currently have an endowed component. Leaders of the LGBT Community Fund for Northeast Florida felt that all funding raised from membership should initially be directed toward the grantees that the Fund supports and not an endowed fund. Now, as the Fund approaches its fifth year, the Steering Committee is revisiting an endowed strategy. Overwhelmingly, funds across the nation are raising their gaze and looking toward the future. Whether it is because funds feel their communities allow the breathing room to invest in an endowment, or because the prospect of unstable funding sources no longer feels like an option, funds new and old are stepping up to be there long-term. As a Horizon's volunteer stated, "Ours is not to complete the task but neither is it for us not to begin it." (Horizons Foundation, n.d.) Without the infrastructure and intention, funds observe they are at great risk for missed opportunities.

The infrastructure for a perpetual funding source immediately conveys intent to support and partner with the LGBT community for the long run, and this is the message many funds seek to send their communities. For donors looking to leave a legacy, there is risk in doing so with an organization that may not still be there in 20 years. By giving to an endowment at a community foundation, donors can trust that their legacy will fund the work and causes they believe in through trusted existing and future organizations. A donor's legacy and the impact of their dollars will not fade if an individual organization does.

The needs of the LGBT community are changing over time and look very different today than they did 50, 40, 30, 20 years ago. In fact, the needs are in some cases wildly different than they were two years ago. In the words of a Horizons donor, "If I'd died in 1979 and left my estate to an organization that couldn't respond to HIV/AIDS, I would have missed an opportunity to fund the most pressing need of a changing community. Because we can't know what's coming, we need a place — an

institution like Horizons Foundation — that can use its resources in ways we can't foretell, to respond to both the challenges and the victories." (Gleba, n.d.)

The LGBT community requires the ability to respond nimbly to the unforeseen challenges, an ability they have not had in the past. Powerful memories result from that absence of capacity. Deb Stallings, Vice President of Development for the Horizons Foundation, relayed in a phone conversation, "We weren't able to help while our friends were dying from AIDS in the 80's and 90's. No one came to help. We couldn't fund research. We couldn't fund education. We couldn't fund prevention. Because of the work we are doing today, because of the work you are doing today, that will never happen again. We can literally start changing the world today."

The LGBT community is particularly vulnerable to unexpected challenges for a myriad of reasons including that protections are still lacking, those that are in place are often not fully felt by the community, social discrimination is still prevalent, and there is inequitable funding. Thus, it is particularly important that organizations have the ability to respond to the needs of this community. Endowed field of interest funds help provide the stability for this community that social, political, and economic trends have not allowed in the past. Individual donors across the country have recognized the need and have often been the catalyst for the creation of these endowments.

Fundraising Strategies and Considerations for Sustainability

LGBT funds throughout the United States employ a wide variety of fundraising strategies in order to achieve their missions. These strategies are rarely used alone and which strategies they employ are largely dependent on: a fund's impetus for creation, the fundraising preferences of the fund's associated community foundation, and the maturation of the fund in question. No compelling organization presented itself regarding the frequency with which these strategies are utilized by funds. The strategies that follow are consequently organized with an eye toward prioritizing methods successfully employed by funds that have built sustainable sources of funding.

Catalyst Donors

At times called “angel investors”, but for the purpose of this report called “catalyst donors” due to support that often follows in equally significant forms, inspirational individuals have often started the task of securing the future for the LGBTQ community. In Boston, a donor left \$10 million to The Equality Fund of The Boston Foundation in their estate. In Vermont, Robert Mundstock, who responded to swirling conversations about potential LGBT funding vehicles with, "do something about it, or I will not be able to leave you anything!" served as “the catalyst for incorporating the foundation” and passed away just months after the infrastructure was in place. (Vermont Community Foundation, n.d.) He was then followed by Doug Howe who created the Douglas C. Howe and Frank E. Shivers Trust. According to Samara’s previous Executive Director, Bill Lippert, “The vision and generosity of our founding benefactors continue to inspire other members of our communities to sustain and nourish the foundation.” (Vermont Community Foundation, n.d.)

In Kentucky, funding came from Clifford Todd, who made his money as the Chairman of a Kentucky-based private prison firm. He committed to 1:1 match up to \$500,000 to start an endowment and the matching funds for The Cliff Todd Endowment were raised in four years. Just recently, JustFundKY set out on a new campaign to grow the endowment to 5 million dollars. According to Ernesto Scorsone, President and Founder of JustFundKY, Mr. Todd had come out as gay later in life and “cherished the idea of legitimizing himself in the LGBT community.” In San Francisco, Joseph Rosenthal, a retired librarian that amassed a fortune through investments in real estate, transferred \$4 million to the Horizons Foundation’s endowment. He was 77 at the time and having “almost no living family” stated that, "Certainly, not having children prompts one to consider other options, such as supporting charitable organizations in the area of my particular interest." (Ustinova, 2008) Though the LGBT Community Fund for Northeast Florida does not currently have an endowment, the Fund has benefited from a catalyst donor. As previously cited, the Fund was initially

made possible by the support of Jeff Chartrand. Jeff Chartrand and his family continue to be integral catalysts to the Fund's development.

The Great Wealth Transfer

The most effective tool for endowment building has been an emphasis on planned giving. Perhaps in no other segment of the population can a stronger case be made for making planned giving a fundraising imperative. In what is known as "The Great Wealth Transfer," it is expected that more than \$30 trillion in wealth will be transferred from baby boomers. The United States is already in the middle of this transfer and the wealth is being transferred largely to millennials. (Carlozo, 2017) This transfer of wealth has unique considerations in the LGBT community.

LGBT baby boomers experiencing this transfer of wealth are affected by the social and legal obstructions to forming families that have left them far more likely to be single, childless, and estranged from their biological families. A San Francisco study found that 29% of LGBT seniors have children while 90% of heterosexual elders do, a disparity that is surely wider in other parts of the country. (de Vries, 2009) LGBT elders often rely on families of choice such as a network of friends, friends that are themselves aging. For those that are in partnerships or marriages, they often have a two-income household. It is important to note that while some factors may increase the wealth available for transfer in this generation, same-sex couples experience higher poverty rates than heterosexual couples and lesbian couples experience higher levels of poverty than gay couples. (Goldberg, 2009)

Some funds have strategically positioned themselves to assist a subset of this generation, known as the Stonewall Generation, in their planned giving. The Stonewall Generation has an unparalleled grasp on the importance of preparing for unknown challenges in the LGBT community, having witnessed first-hand tremendous strife and milestones in their own journeys.

The Stonewall, and post-Stonewall, generations are finalizing their estates now and they are uniquely able to recognize the benefit stable long-term funding would provide. While a long history of urgency to time-sensitive threats is an inherent challenge of LGBT planned giving, an opportunity to be proactive rather than reactive may be uniquely satisfying. As stated by a member of Horizon’s endowment committee, “This is a campaign that’s from strength. We’re not asking people to react to an epidemic. We’re not asking people to react from an initiative that’s against us.” (Horizons Foundation, n.d.)

The Stonewall Generation

The Stonewall Generation, a subsection of the baby boomer generation, refers to LGBT community members and activists shaped by the five days of riots in the summer of 1969. The Stonewall Inn, in Greenwich Village, was one of the most popular gay clubs in New York. It was illegal to sell alcohol to LGBT individuals and thus The Stonewall Inn was unlicensed. New York had laws banning homosexuality in public. A gay male could be arrested for wearing less than three items of “gender-appropriate” clothing. On June 28, 1969 when the bar was raided, a riot ensued. Patrons were “roughed up” by the police and thirteen individuals were arrested. Crowds reached over 1,000 people at times and demonstrations took place throughout the city in the days that followed. Stonewall and its anniversary became the rallying cry around which activist groups and gay-rights organizations formed and the first gay pride marches were held. (Halloran, 2013; Stonewall Riots the Beginning of the LGBT Movement, 2009; The Stonewall Riots, 2017)

Future Considerations for Planned Giving

Looking down the road, yet another consideration is that LGBT youth are living a more intersectional life, and their sexuality and gender identity is unlikely to define them in the way it has

those that came before them. The result of this progress is that future generations are unlikely to feel the same calling to support their LGBT communities that LGBT elders and adults do. By being raised in a less accepting society, elders and adults have theoretically relied more heavily on their LGBT communities and have a deeper affinity and affiliation to that community and buy-in to preserving its future.

Planned Giving Campaigns

Various, often integrated, tools have been used by funds across the nation to capitalize on this strategy of planned giving. Standing above the rest is the Horizons Foundation in San Francisco, the first community foundation based in and dedicated to the LGBT community. Horizons has embarked on a 35th anniversary campaign named “Now and Forever.” Initially, this campaign will raise \$3.5 million to invest in the foundation’s capacity so that it may then raise \$100 million in legacy gifts by 2020. (Horizons Foundation, n.d.) Debra Stallings, Vice President of Development, is already aware of approximately \$70 million in planned gifts through her conversations with just 40 of 372 Legacy Society members. The LGBTQ Community Endowment Fund at Horizons was founded in 2005.

Endowment Councils and Cabinets

In addition to utilizing professional advisors, a few funds researched are calling on ambassadors for planned giving. For example, JustFundKY of the Bluegrass Community Foundation, recently formed an Endowment Council comprised of 20 “community pillars” in order to increase the endowment through individual gifts and planned giving. Horizon Foundation’s “Now and Forever Campaign” utilizes a Campaign Cabinet, which is chaired by two couples and comprised of approximately 26 individuals in total.

Planned Giving Guides

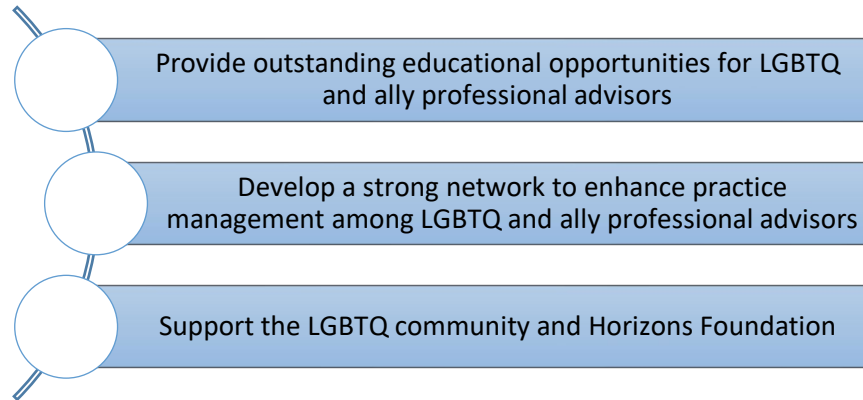
Horizons Foundation has long led the field of planned giving in the LGBT community and has assisted other LGBT place-based community foundations across the United States by allowing them to adapt their planned giving guides and other materials. While much of this work was established before the United State Supreme Court ruling in June of 2015 legalizing same-sex marriage nationally, Horizons has found that there is still a need for materials relevant to the nuances of the LGBT community and it is updating several of its publications.

JustFundKY of the Bluegrass Community Foundation, which calls for a primary goal of increasing its endowment to \$5 million in five years and to grow this endowment through planned giving, is one fund that has utilized Horizon's materials. (JUSTFundKY, 2017) It developed its "Guide to Gift Planning for the LGBT Community" with the help of the Horizons Foundation and a 2016 grant of \$49,000 from Out in the South in order to "develop a strategy for planned giving to increase support for LGBTQ organizations across the state." (Funders for LGBTQ Issues, 2017) The HOPE Fund in Michigan also created a guide, the "Estate and Planned Giving Guide for Lesbian, Gay, Bisexual, and Transgender Individuals, Couples and their Families." The LGBT Community Fund for Northeast Florida does not currently have planned giving materials unique to the LGBT community.

Professional Advisors

Just as professional advisors serve as an important referral resource for all community foundations, they are playing an important role for established LGBT funds across the country. Multiple funds cited this important relationship and a desire to cultivate these relationships. Several funds include such professionals on their Steering Committees. Again, leading the field, this time in the use of professional advisors, is the Horizons Foundation. Horizons hosts a robust Professional Advisors Circle (PAC) composed of financial advisors, estate planning attorneys, accountants, real estate professionals, and insurance professionals.

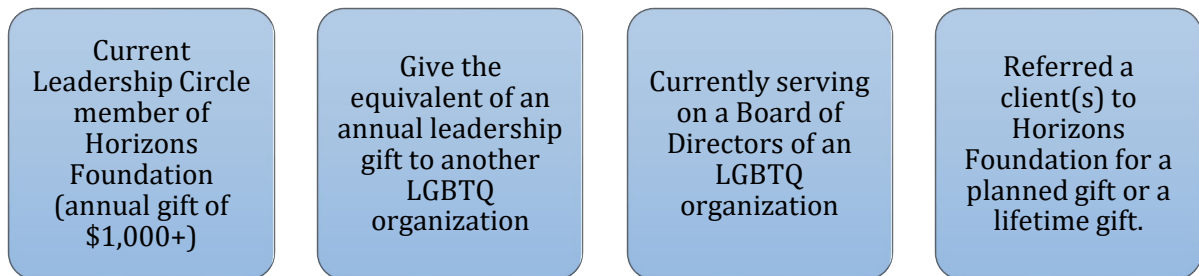
Goals of Horizons Foundation's Professional Advisors Circle (PAC)



The Horizons Foundation hosts approximately four “lunch and learns” per year addressing topics relevant to advising LGBTQ clients and encouraging networking opportunities. It also hosts an online “Directory of Professional Advisors for the LGBTQ Community.” There are both paid and unpaid listings available, each with different benefits ranging from contact information, advisor profiles, links to business websites and social media feeds, and capabilities to upload news and articles for prospective clients. The paid listing is a cost of \$149 per year.

An additional component of PAC is the “Horizons’ Professional Advisors Circle Badge” which serves to indicate commitment to the LGBTQ community. In order to qualify for this badge of approval, advisors must meet two of four criteria. (Horizons Foundation PAC Directory, n.d.)

Horizons Foundation's Professional Advisors Circle (PAC) Badge Two of Four Criteria Required



Though the LGBT Community Fund for Northeast Florida does not have its own dedicated Professional Advisory Council, The Community Foundation for Northeast Florida has four Professional Advisory Councils, based on geographic areas. Groups from Downtown Jacksonville, Amelia Island, St. Augustine, and the Beaches regularly meet to exchange ideas and learnings, hear speakers, and network. These four Professional Advisory Councils are comprised of more than ninety attorneys, accountants, financial planners, and other financial professionals and serve as a resource to The Community Foundation for Northeast Florida's initiatives, including the LGBT Community Fund for Northeast Florida.

Legacy Societies

For donors that designate funds in their estate, there are legacy societies. The HOPE Fund of the Community Foundation for Southeast Michigan, the Horizons Foundation, The Delaware Valley Legacy Fund (which is an independent 501(c)(3) that has established an endowment with The Philadelphia Foundation), JustFundKY of the Bluegrass Community Foundation, the Gay and Lesbian Broward Community Fund of The Community Foundation of Broward, Our Fund Foundation, and The Samara Fund of The Vermont Community Foundation are just a few of the funds that utilize legacy societies. Staff representatives were always quick to point out that they are likely not aware of the full extent of legacy gifts, but that they are aware of several expectancies.

The Gay and Lesbian Broward Community Fund, which has approximately 140 members in its Legacy Society, holds an annual event to allow donors an opportunity to educate the group on the impact of their future gifts. The Community Foundation of Broward feels that this is an effective tool for allowing legacy donors to appreciate their gifts now. The Delaware Valley Legacy Fund's published materials state that over 50 individuals are members of the DVLV Legacy Society and that more than \$14 million in expectancies are known at this time. (Delaware Valley Legacy Fund, n.d.) The Horizon Foundation's Legacy Circle currently has 372 members and of those, the Foundation's

Vice President of Development is aware of 40 members through which \$70 million in expectancies are anticipated.

The LGBT Community Fund for Northeast Florida does not currently have a legacy society, though The Community Foundation for Northeast Florida has established a Legacy Membership program through another hosted giving circle, the Women's Giving Alliance. Legacy Membership is extended to Women's Giving Alliance donors that establish an individual endowed fund with a minimum gift of \$25,000, payable over five years. Legacy Members receive lifelong membership, inclusive of all membership benefits, and a gift to the grantmaking fund is made in their name each year. Nearly 50 of the 488 members of the Women's Giving Alliance are currently Legacy Members.

Annual and Year-End Appeals

Several funds cited that their most successful fundraiser is their end of year appeals. The HOPE Fund, in particular, remarked that they felt there was no need to pursue multi-year commitments at this time due to the strength of their end of year appeal. The Pride Foundation's Whidbey Giving Circle also cites that their year-end appeal generates their largest return for the year.

Matching Grants

Matching funds are used in several ways to ignite fundraising either for immediate grantmaking, endowment growth, or both by sustaining grantmaking while simultaneously growing a permanent funding source through an endowed fund. The source of matching funds is largely dependent on the capacity of the community foundation the fund is associated with. For example, The Boston Foundation, which manages \$1.1 billion in assets and has also made \$1.1 billion in grants since 2001, initially used a matching grant initiative to support The Equality Fund. The Boston Foundation directed \$50,000 of discretionary gifts to The Equality Fund endowment for every \$100,000 the Fund independently raised to sustain the its grantmaking. This campaign successfully concluded once The

Equality Fund raised \$500,000, resulting in \$250,000 in discretionary funds from The Boston Foundation to The Equality Fund's endowment. Of note, this is a unique case resulting from the enormous capacity of The Boston Foundation and a shift in the Foundation's overall strategy for increasing grantees' stability and capacity through discretionary grantmaking aimed at operational support. Chicago Community Trust, which manages more than \$2.5 billion in assets and disbursed more than \$236,500 in grants in 2016, offered a similar matching grant opportunity to its LGBT Community Fund, contributing \$500,000 for an endowment once \$1,000,000 was raised to sustain grantmaking.

Boston and Chicago are unrealistic models for most community foundations, including The Community Foundation for Northeast Florida. The strategy of matching grants is also found in medium and small community foundations, but often these funds are instead offered by individual donors, other funds within a community foundation, or outside grants. For example, Delores Barr Weaver, a substantial fund holder at The Community Foundation for Northeast Florida and a member of The LGBT Community Fund for Northeast Florida, previously extended a matching grant of \$20,000 to spur donations to the Fund. The LGBT Fund at The Spartanburg County Foundation received a matching \$25,000 grant from Weston Milliken's Freeman Foundation. The Community Foundation of Sarasota County provides a 1:1 match for all grants made by Our Sarasota Fund through a field of interest fund, the McCauley-Brown Fund, that is aligned with Our Sarasota Fund. In total, Our Sarasota Fund has disbursed \$51,382 in grants, inclusive of matching funds, since 2015.

Funders for LGBTQ Issues' Out in the South Initiative has also provided matching funds for many southern LGBT funds. In 2017, Out in the South extended matching grants to funds such as The LGBTQ Fund at the Community Foundation of Greater Birmingham, the LGBT Fund at The Spartanburg County Foundation, the Lorde-Rustin Giving Circle at The Community Foundation for Greater Atlanta, and Texas Pride Impact Funds. In 2016, the LGBT Community Fund for Northeast

Florida was also a recipient of a matching grant from the Out in the South Initiative. (Fundors for LGBTQ Issues, 2017)

Giving Levels

Giving levels, a mainstay of fundraising techniques, are employed by both place-based community foundations and independent LGBT community foundations. In some cases, once a donor reaches a certain funding level, such as \$1,250 for the Charlotte Lesbian & Gay Fund at Foundation for the Carolinas, a portion of the donation is directed toward an endowed fund while the rest is used for annual grantmaking. Giving levels are found throughout all funding models and may represent individuals or corporations. Generally, five giving levels, of assorted price and title, are utilized. The LGBT Community Fund for Northeast Florida does not currently employ giving levels beyond its individual membership price point of \$2,500.

Foundation for the Carolinas		Chicago Community Trust		Texas Pride Impacts Funds		Our Fund Foundation	
\$1,000	Stakeholder	\$Up to \$5,000	Kindle	\$3,000	First Hundred Funder	\$1,500	Supporter
\$1,250	Stakeholder Plus	\$5,000	Spark	\$5,000	Major Donor	\$2,500	Friend
\$2,500	Founder	\$25,000	Flash	\$10,000	Lead Donor	\$5,000	Sponsor
\$5,000	Founder	\$50,000	Ignite	\$20,000	Visionary Donor	\$10,000	Visionary
\$10,000	Founder	\$100,000	Unite	\$50,000	Impact Donor	\$15,000	Community Leader

Corporate Donors

Corporate donors were successfully prospected by several funds. Community foundation representatives observed that the association with their institution likely secured funding from

corporate donors that fund grantees were unlikely to receive directly. The measure of approval that accompanied gifts to the corporations' local community foundations largely eased any concerns their board members or shareholders may have. Additionally, it was thought that larger corporate donors often won't entertain smaller grants, but they may be interested in a vehicle that allows them to make a larger impact without the required legwork.

Chicago Community Trust lists BMO Harris Bank, UBS, and the US Bank Foundation as major donors in categories ranging from \$25,000-\$99,000 and The Boston Foundation cites Northern Trust, Eastern Bank, and BNY Mellon as key corporate donors. Often relationships with these corporations are the result of Trustee representation on the Foundations' Boards. For example, Trustees of Chicago Community Trust currently include: President and Chief Executive Officer of BMO Harris Bank, David Casper; Market President for U.S. Bank in Chicago, Marsha Cruzan; and Chairman and Chief Executive Officer of The Northern Trust Company, Rick Waddell.

Smaller community foundations, such as Community Foundation of Greater Birmingham, are also beneficiaries of corporate donations. Community Foundation for Greater Birmingham received a \$10,000 gift from a corporation in order to help build its The LGBTQ Fund endowment. However, Kim Rogers, Program Officer, explained, "We have found that corporations typically do not like to contribute to endowment building, usually preferring to see their gift designated to a specific (and immediate) purpose. But we made the case that this fund needed corporate support to reach its goal and a gift would show tremendous support of the LGBTQ community." In this case, it also appealed to the corporation that they would be the first corporation to make a major gift.

Foundation for the Carolinas' Charlotte Lesbian and Gay Fund has successfully secured corporate donations through their annual event, "Happening!" by way of corporate sponsorships. In 2017, Wells Fargo and Rosedale Medical served as the event's "Equality Presenting Sponsors." David Snider, Vice President and Program Officer of Foundation for the Carolinas, stated, "In our experience, corporations prefer to sponsor an event rather than contribute dollars that will pass through for

grantmaking and this is understandable. We hope that as the Charlotte Lesbian and Gay Fund continues to build credibility and deeper subject matter expertise we can leverage our corporate partners to see us as a feasible conduit for LGBTQ funding in our community.”

The Community Foundation for Northeast Florida has also solicited corporate gifts for the LGBT Community Fund for Northeast Florida; however, these gifts have been designed to support research needs. For example, Florida Blue contributed \$10,000 and the Baptist Health Foundation and the Jessie Ball DuPont Fund each contributed \$5,000 to help underwrite the *Jacksonville-Area Community Needs Assessment Project*. The Community Foundation for Northeast Florida takes particular care not to compete with corporate dollars pursued by its grantees.

House Parties

House parties are regularly employed as an initial fund and friendraising strategy by funds throughout the nation. Some funds rely on these more than others. The LGBTQ Fund of the Community Foundation for Greater Birmingham is largely reliant on house parties, for example, but more robust funds such as the Delaware Valley Legacy Fund utilize them as well. Birmingham currently has five house parties on the calendar and have hosted three to-date. Staff observed that these events raised between \$5,000-\$10,000, with expenses for food, drink, and invitations taken on by the hosts, not the Fund. With assistance from a planning grant, Birmingham standardized plans for these house parties by creating packets with invitations, invited guest forms, all materials for handouts, a timeline, and a checklist. Though Birmingham has seen success with these events, one concern cited by other funds is that while this type of event is often successful with friendraising, that does not always equate to success with fundraising. Some mature funds are less reliant on these events and often don't feel that the return on investment makes sense for their organization. The LGBT Community Fund for Northeast Florida continues to utilize house parties approximately three times per year in order to cultivate new donors and announce the Fund's grantees.

Digital Fundraising Platforms

Digital platforms have given rise to new fundraising campaigns such as Give OUT Day, a national 24 hours digital fundraising event aimed at giving for the LGBTQ community. This event began in 2013 and has benefited over 600 organizations through more than \$4 million in contributions from over 33,000 donors. (Give Out Day, 2018) In 2017, this event raised \$755,666. Give OUT Day is scheduled for April 19, 2018 this year and its associated website has an abundance of resources available for nonprofits. The digital platform is free for nonprofits to use and funds as sophisticated as the Horizons Foundation in San Francisco have benefitted. Another free digital fundraising platform utilized by funds such as the Delaware Valley Legacy Fund of The Philadelphia Foundation is Amazon Smile, administered through Amazon's website. Shoppers that designate the fund will see 0.5% of their eligible purchases donated to the fund. (Delaware Valley Legacy Fund, n.d.)

Funds with Facebook pages, such as JustFundKy of the Bluegrass Community Foundation, have added a "Donate" button on their pages, directing donors to the funds' independent webpages. Websites for each fund host donation pages through which visitors may donate directly using credit cards or through their own donor advised funds held at the respective community foundation. On occasion, LGBT funds also appear as a specific option available through drop-down menus on their associated community foundation's general donation page; this is particularly true in cases of endowed field of interest funds. The LGBT Community Fund for Northeast Florida employs The Community Foundation for Northeast Florida's website for online donations.

There are undoubtedly additional fundraising strategies, unique to the funds and communities they serve, that are not captured in this research. Generally, funds with sustainable fundraising models cited evaluating and adjusting their strategies based on the output required by each strategy against the value gained. As funds mature and are able to add more advanced methods of fundraising such as legacy initiatives, they also tend to devote less resources to high output, low gain strategies such as frequent house parties geared toward friendraising as a precursor to fundraising. However,

given the low output required by strategies such as digital fundraising platforms, some traditionally low gain strategies continue to be utilized by even the most sophisticated funds. The most successful funds prioritize strategies by continuously evaluating their internal strengths and weaknesses in conjunction with external opportunities and threats and then constructing strategic alterations to keep the funds on a path of advancement.

Strategic Planning

Strategic planning is a critical component of successfully advancing any organization. This is especially true of young organizations and organizations embarking on new territories, as the LGBT Community Fund for Northeast Florida and several other LGBT funds have in recent years. It is unwise to pursue any trend without first examining how the unique components and considerations of an organization are likely to influence the implementation of such a change.

SWOT Analysis

A SWOT Analysis is a commonly used instrument in many strategic planning processes. It is a framework used to audit and analyze an organization based on its Strengths, Weaknesses, Opportunities, and Threats. This process organizes internal considerations (Strengths and Weaknesses) and external considerations (Opportunities and Threats), presenting considerations for an organization's sustainability. Its initial development can be traced back to Albert Humphrey, a Stanford University researcher investigating corporate planning. (Humphrey, 2005) While this process has its limitations, it can help an organization assess "how current capabilities and limitations (Strengths and Weaknesses) match up against the influencing factors (Opportunities and Threats)." (International Institute of Business Analysis, 2009)

Strengths

Strengths are internal resources and capabilities, for which an organization has some degree of control over, used by the organization for a competitive advantage. They may be tangible or intangible and once identified should be maintained, built upon, or leveraged by the organization. (Tacit Intellect: Driving Business Efficiency, 2012) For the purposes of this report, it is important to differentiate Strengths of the LGBT Community Fund for Northeast Florida from Strengths of The Community Foundation for Northeast Florida. While the organizations are deeply aligned, it would limit any analysis to combine the two.

Strengths	
The Community Foundation for Northeast Florida	The LGBT Community Fund for Northeast Florida
<i>Internal Use Only</i>	<i>Internal Use Only</i>

Weaknesses

Weaknesses, like Strengths, are considered internal characteristics for which the organization has some degree of control over. They place the organization at a disadvantage over its competitors by preventing, limiting, or derailing accomplishment of the organization’s mission and objectives. Again, they may be tangible or intangible. Once a weakness is identified it should be remedied, changed, or stopped in order to obtain or maintain a competitive advantage. (Tacit Intellect: Driving Business Efficiency, 2012) For the purposes of this report, it is important to differentiate Weaknesses of the LGBT Community Fund for Northeast Florida from Weaknesses of The Community Foundation for Northeast Florida. While deeply aligned, it would limit any analysis to combine the two.

Weaknesses	
The Community Foundation for Northeast Florida	The LGBT Community Fund for Northeast Florida
<i>Internal Use Only</i>	<i>Internal Use Only</i>

Opportunities

Opportunities are external components of the environment that the organization operates within and are the reasons for the existence and development of the organization. The organization does not have control over the opportunities but may use the opportunities to its advantage. Organizations should consistently monitor opportunities that arise, and an organization's Strengths and Weaknesses will help determine its ability to do so and to react in a way that uses the Opportunities to further the organization's mission and objectives.

Some Opportunities are ongoing and some only present themselves for a short duration of time. The goal for an organization should be to prioritize, capture, build-upon, and optimize Opportunities. (Tacit Intellect: Driving Business Efficiency, 2012) For the purposes of this report, Opportunities are reviewed jointly between The Community Foundation for Northeast Florida and the LGBT Community Fund for Northeast Florida.

<p style="text-align: center;">Opportunities</p>
<p style="text-align: center;">External of The Community Foundation for Northeast Florida/ The LGBT Community Fund for Northeast Florida</p>
<p style="text-align: center;"><i>Internal Use Only</i></p>

Threats

Threats are also external components of the environment that the organization operates within but does not have control over. Threats jeopardize the success of an organization in realizing its mission and objectives. Some threats are ongoing and known and some develop quickly and with little warning. As is the case with Opportunities, an organization's Strengths and Weaknesses will play a large part in determining how effectively an organization responds to each Threat, and what the ultimate effect on that organization is.

An organization can take control of its response to a Threat and can also attempt to prevent compounding damage that may arise when an internal Weakness and external Threat collide. To do this, the organization should address its Weaknesses and plan for its Threats. The goal for an organization should be to counter, minimize, and manage Threats in its external environment. (Tacit Intellect: Driving Business Efficiency, 2012)

<p style="text-align: center;">Threats</p>
<p style="text-align: center;">External of The Community Foundation for Northeast Florida/ The LGBT Community Fund for Northeast Florida</p>
<p style="text-align: center;"><i>Internal Use Only</i></p>

Limitations and Additional Considerations

A SWOT analysis has limitations and its framework risks simplifying more nuanced associations between organizations and their environments. It creates a one-dimensional model that characterizes each element as a Strength, Weakness, Opportunity, or Threat when, in fact, the interplay between these elements is multi-dimensional. Furthermore, unlike for-profit organizations, non-profit organizations often consider two bottom lines: one that measures finances and another that measures social impact. Because the Community Foundation for Northeast Florida and the LGBT Community Fund for Northeast Florida are aligned with the grantees they support, Weaknesses of and Threats to the Fund that result from Strengths and Opportunities of grantee organizations, or other LGBT serving organizations, are not necessarily in opposition. In other words, a Threat to the Fund's financial bottom line may not be a Threat to the Fund's social impact bottom line.

Consider the following; A member of the LGBT Community Fund for Northeast Florida learns of an exciting project at JASMYN, a grantee of the LGBT Community Fund for Northeast Florida, through their involvement in the LGBT Community Fund for Northeast Florida. As a result, they increase their direct support for JASMYN and then have a reduced capacity for supporting the LGBT Community Fund for Northeast Florida. This may hurt the financial bottom line of the LGBT Community Fund for Northeast Florida, but not necessarily harm the Fund's social impact bottom line. After all, the LGBT Community Fund for Northeast Florida is still, in part, responsible for getting that funding to the LGBT community in Northeast Florida.

Additional Considerations

- Reduced funding capacity of current or potential funders of the LGBT Community Fund for Northeast Florida due to increased success of grantees, or other organizations serving the LGBT community, in fundraising
- Reduced member engagement in the LGBT Community Fund for Northeast Florida due to increased member engagement with grantee organizations, or other organizations serving the LGBT community
- Reduced need for funding through the LGBT Community Fund due to increased funding from “mainstream” funding sources and increased services from “mainstream” organizations and programs
- Reduced funding or engagement due to members of the LGBT community leading more intersectional lives that allow and/or inspire their interests and resources to be directed elsewhere

In conclusion, a SWOT Analysis does have limitations but it can be a useful tool to include in a decision-making process, particularly when used in strategic planning. It is a highly subjective tool, even when care is taken to provide a neutral assessment, and it does not weigh or prioritize findings. A SWOT Analysis should be a living framework that constantly evolves, just as internal and external environments do, and as new perspectives are gained.

Impressions

If initial funders and current members are committed to continuing their initial vision and their many successes over the last five years, the LGBT Community Fund for Northeast Florida appears well-positioned to galvanize the Jacksonville community and successfully create a perpetual funding source for the LGBT community in Jacksonville and its surrounding areas. There does not appear to be a compelling reason for the closure or failure of the LGBT Community Fund for Northeast Florida.

Jacksonville has repeatedly been recognized as one of the more charitable cities in the United States and Florida is home to approximately 663,000 LGBT adults and 100,000 youth. (Brown, Mallory, Sears, & Walch, 2017; Lindsay, 2017; The Chronicle of Philanthropy, 2012) The Community Foundation for Northeast Florida has seen staggering growth in the last five years. The LGBT Community Fund for Northeast Florida has now developed a five-year track record of successfully meeting its goals and it continues to benefit from a supportive working relationship with The Community Foundation for Northeast Florida.

As a giving circle, The LGBT Fund for Northeast Florida has successfully attracted donors at what is one of the highest individual price points in the nation, notably with many members and supporters that identify as allies, not as LGBT individuals. This last point cannot be overemphasized. A question posed during the focus groups was, "How big is Jacksonville's LGBT community and how big is the universe of potential donors? In the Jewish community of 25,000 - 30,000 residents locally, only a small percentage give regularly to Jewish causes. We may already have reached the group of LGBT people who have the means and motivation to give. Do we know?" (Littlepage, Constituent Perceptions and Comments, 2017) Members of the LGBT Community Fund for Northeast Florida should be greatly encouraged and motivated by the substantial support the Fund enjoys from those that identify as allies. It demonstrates that the Fund is not limited to the LGBT community and that the Fund's mission is compelling enough to compete for substantial dollars both within and outside

the immediate LGBT community. The Fund's stakeholders include major philanthropic leaders and participants, not only by local standards, but by national standards. The support and asking power of these funders cannot be undervalued. These members and funders are well regarded in the community and considered knowledgeable and trusted leaders on complicated matters affecting the city, most notably on health, education, and business.

While the number of stakeholders in the LGBT Community Fund for Northeast Florida may be perceived as small, it does not appear substantively more limited than funds which have successfully built meaningful endowments, or are well on their way to accomplishing that goal. Furthermore, it could be argued that the LGBT Community Fund for Northeast Florida, whether intentionally or not, has in practice closed itself off from other potential funders, both large and small, through its structure, price point, and events. This leaves much room for growth, especially in a region experiencing growth in population, jobs, and wages. The Fund's events are generally limited to small house parties, which while serving as a significant opportunity for meaningful socialization between stakeholders, also limit the Fund's reach when not paired with larger opportunities. Guest lists do not appear to extend far beyond the network of the Fund's initial donors.

There is undeniable momentum in Jacksonville that does not appear to be fully tapped by the LGBT Community Fund for Northeast Florida. Rarely has Jacksonville's City Council Chambers seen a community demonstration such as what occurred the night of February 14, 2017 when a final vote was held on the Human Rights Ordinance. Per one news report, "City Hall reached capacity hours before a vote would occur, forcing officials to open up overflow rooms to accommodate the crowd." (Action News Jax, 2017) Support was greatly buoyed by advocates from the business community, including over 700 businesses and the Chair of the 2017 JAX Chamber, who recognized the importance and value of investing in our LGBT community members. (Jacksonville Business Journal, 2017)

While significant, the passing of the HRO should not lull funders into a false sense of security that the needs of the LGBT community will be more fully met in the future or that the full realities of the future may be known at this time. Creating an infrastructure to seize opportunities and respond to the variations each threat and event may carry will surely not be in vain. At the outset of this research, Jacksonville suffered a hit from Hurricane Irma. While it was expected to be a major event, the flooding and destruction that took place was unprecedented. However, due to the creation of the First Coast Relief Fund a year earlier following Hurricane Matthew, The Community Foundation for Northeast Florida was positioned to immediately accept and provide relief. The infrastructure was in place, and no one could have known the impact that structure and capacity would have less than a year after its creation. It begs the question, what opportunities are being missed for tomorrow's LGBT community if we fail to create an infrastructure for perpetual funding today? The *Jacksonville-Area Community Assessment Project* will undoubtedly present a deeper understanding of the challenges the LGBT community continues to face in Jacksonville. It is likely that new, or more directive, opportunities and threats will reveal themselves and further inform the mandate of the LGBT Community Fund for Northeast Florida and its funders.

A participant the Fund's focus group noted that if the Fund were to close, "It would be seen as a huge failure and have a negative reflection on the LGBT community – be a black eye – they don't even support themselves." (Littlepage, *Constituent Perceptions and Comments*, 2017) Lifting this argument is the impression that the current conditions of the Fund are undeniably primed to leverage. Any black eye may instead result from inaction on conditions that are unlikely to be more favorably replicated in the future. Should current stakeholders feel that taking the first steps toward a meaningful endowment is out of reach now, any future efforts (which will most certainly be stalled) are likely to be partially inspired from, or at a minimum acknowledge, this missed opportunity. The task may not be theirs to complete, but given the most favorable conditions, it is theirs to begin.

Recommendations

It is recommended that the LGBT Community Fund for Northeast Florida consider the following (not in order of priority):

- ◇ Consider conducting a new survey of Fund participants and prospects to determine:
 - What value-adds they desire through their fund participation and if they feel a giving circle model is required or best suited to attain these
 - Willingness to approach the LGBT Community Fund for Northeast Florida as part of their ongoing annual giving plan
 - Willingness to contribute an endowment gift in addition to their current level of support
 - Willingness to include the LGBT Community Fund for Northeast Florida in their planned giving and join The Community Foundation for Northeast Florida's Legacy Society
 - Willingness to be a catalyst donor in order to stimulate endowment growth
 - Willingness to have a portion of their annual donation directed toward an endowment going forward
 - Willingness to reduce grantmaking, if required, in order to begin building an endowment
- ◇ Consider a public and competitive Request for Proposal process, rather than a negotiated grants process, in order to raise the Fund's profile and become more knowledgeable about the work being done in the LGBT community
- ◇ Conduct a survey of grantees to ascertain their perceptions of a giving circle model as it relates to their relationships with funders
- ◇ Consider if a \$2,500 per individual price point allows for ample growth and expansion of membership
- ◇ Continue to shift responsibilities to Fund volunteers through the creation of an Events and/or Development Committee
- ◇ Consult with Deb Stallings, Vice President of Development for the Horizons Foundation, who has overseen a tremendous planned giving campaign

- ◇ Review JustFundKY’s 2016 grant from the Out in the South Initiative, which included \$49,000 to “develop a strategy for planned giving to increase support for LGBTQ organizations across the state”
- ◇ Consider if one or more funders would serve as catalyst donors to an endowed field of interest fund as an additive to their annual member donation, acknowledging that these funders may not reveal themselves through a survey
- ◇ Consider if the Fund is positioned to begin directing a portion of all annual donations to an endowment while simultaneously sustaining grantmaking at its current level
- ◇ Consider the creation of an Endowment Committee and/or Legacy Council composed of lead donors to the endowment and those that have provided to the endowment through planned gifts
- ◇ Consider how The Community Foundation for Northeast Florida’s current Legacy Society may be utilized for the needs of the LGBT Community Fund for Northeast Florida
- ◇ Consider the creation of a Professional Advisor Committee, similar to that of Horizons Foundation, dedicated to serving the LGBT community and consider how The Community Foundation for Northeast Florida’s current professional advisors may fit into such a plan
- ◇ Investigate outside grants to help sustain operating expenses
- ◇ Investigate outside grants to help sustain grantmaking at its current level while an endowment is built
- ◇ Consider how to authentically, respectfully, and strategically diversify the Steering Committee and Membership of the LGBT Community Foundation for Northeast Florida
- ◇ Consider a large anniversary event that would:
 - Raise operating expenses
 - Raise the Fund’s profile
 - Celebrate the Fund’s work of the last 5 years and its grantees
 - Offer corporations a vehicle to support the Fund through sponsorships and tickets
 - Announce the future of the Fund
 - Celebrate a Legacy Society and its members
- ◇ Investigate the Charlotte Lesbian and Gay Fund of Foundation for the Carolinas’ annual Happening! event (Wednesday, May 16, 2018 from 12:00-1:30 pm at the Westin in Charlotte, North Carolina) and consider it as an event model

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Appendices

A: Fund Listing

B: Fund Contacts

C: Fund Resources