

# LGBT Giving Project 2011-2020

Spring 2020  
FINAL REPORT

# Funders and Leadership

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Kevin J. Mossier Foundation

Pride Foundation

Small Change Foundation

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## INTRODUCTION & EXECUTIVE SUMMARY

### Confronting a Challenge—and Seeing Opportunity

The rationale behind the Project, launched in 2011, was simple and compelling. For decades, the financial contributions of LGBT people have fueled our movement and built our community organizations. But contrary to popular belief, most LGBT organizations then—and even today—constantly struggled to raise money, including from individual donors. While individual giving represented—by far—the largest source of potential support, data compiled by the Movement Advancement Project (MAP) indicated that at most only 3.4% of LGB people in the country were giving to the 39 largest LGBT advocacy organizations in the nation. Moreover, there was a surprisingly small pool of donors giving \$1,000 or more a year—under 15,000 in the entire country!

The potential benefit to the LGBT movement was obvious. Every 1% increase in the proportion of LGBT people giving would yield roughly \$24 million more in annual income for LGBT organizations, close to all foundation giving to the advocacy groups surveyed by MAP at the time. An increase in planned giving to the movement held even more dramatic potential, as estate gifts are by far the largest gifts that most people make.

While there were a wide variety of beliefs about why the number of donors was not higher, no one actually knew the reason. Was it because it is so hard to identify and reach LGBT people who are not already on a donor list? Or did many LGBT organizations lack basic fundraising and donor cultivation skills? Were messages and priorities of established organizations simply not resonating with most LGBT people? Was it that LGBT people care more deeply about other issues? And, in the case of major donors, was it that LGBT causes do not have the same social cachet or present the same kind of networking opportunities as are presumed to exist in mainstream institutions?

Meeting of LGBT leaders, fundraising experts, and foundation leaders meet to whether the Project is needed

Barack Obama is president

Congress repeals the “Don’t Ask/Don’t Tell” law

LGBT executive directors endorse moving forward with the project

Phase 1 qualitative research launched

Voters in four states endorse marriage equality

Phase 1 quantitative research launched

Nearly 7,000 LGBT donors complete lengthy survey of attitudes

US Supreme Court strikes down the “Defense of Marriage Act” (*Windsor*)

Research team completes survey of “general population” LGBT individuals

Anti-LGBT forces launch nationwide effort to undermine marriage equality through “religious liberty” claims

Phase 2 begins with two cohorts of LGBT groups working with fundraising consultants

US Supreme Court extends the freedom to marry nationwide (*Obergefell*)

## Creating the Project

2011

The Project’s instigators—the Evelyn & Walter Haas, Jr. Fund, Horizons Foundation, and the Keven J. Mossier Foundation—looked to see if other groups, causes, or communities had worked to answer similar questions and could not find anything comparable.<sup>1</sup> To develop a thoughtful approach to answering these questions, a convening of experts in fundraising, gay market research and polling, and individual donor motivation was held in Chicago in November 2011. The experts agreed that there was, indeed, significant potential to increase LGBT giving above current levels and recommended that the primary target/focus for research in the near-term should be on *LGBT people*; the research should be iterative building on qualitative and quantitative methods; and field-testing of the research would be essential.

2012

## Project Phases

As detailed in this report, over the course of the next 8 years the Project’s work involved four phases:

### Phase 1—Qualitative & Quantitative Research, including:

- Social listening, developing a preliminary psychological analysis about what forms and maintains donor/organizational relationships, donor motivations, and focus groups (2012)
- The largest ever survey of current and recently lapsed donors to 56 LGBT organizations (i.e., “known donors”). More than 8,000 individuals completed it, including 6,755 LGBT people (2012)
- A “general population” survey of just over 1,200 LGBT donors and non-donors. Six reports focusing on specific subpopulations of donors to help organizations tailor their fundraising strategies (2013)

2013

2014

- Six reports focusing on specific subpopulations of donors to help organizations tailor their fundraising strategies (2013-2015)

**Phase 2—Field Testing**, which included providing expert fundraising assistance to a total of nine LGBT organizations, divided into two cohorts, one of community centers and the other for statewide LGBT advocacy organizations. (2015-2016)

2015

**Phase 3—Post-election “Silver Lining” Research** designed to understand if and how the election of Donald Trump might have changed LGBT donor attitudes and motivations. This phase included focus groups and two surveys included 1,402 LGBT respondents. The most resonant messages were then tested through direct mail and on-line solicitations. (2017-2018)

**Phase 4—Taking it on the Road**, which included multiple workshops with LGBT groups across the country to share the Project’s findings and best practices. (2017-2019)

<sup>1</sup> Although it was published well after the Project began, the 2018 survey of high-net worth donors includes data suggesting that at these donors who are LGBT report giving to LGBT causes at rates generally comparable to other identified communities, including women, African Americans, and Hispanic, and Asia Pacific Americans. *2018 U.S. Trust Study of High Net Worth Philanthropy*, Indiana University Lilly Family School of Philanthropy (2018).

## Key Takeways

1. Messaging alone has relatively little impact on LGBTQ people donating to LGBTQ causes.
  - a. There is no messaging “magic bullet” that has dramatic potential to motivate more LGBTQ people to donate.
  - b. Several possible messages and message frames are generally viewed positively by LGBTQ donors (and potential donors).
  - c. Richly detailed research into donor motivations and effective messaging is of marginal value to small and medium sized LGBT organizations because of capacity issues and the inability to meaningfully segment their lists.
2. Hands-on assistance from fundraising experts is critical because it forces over-extended executive directors and senior staff to set aside time to truly focus on fundraising, including improving specific development capacities. In other words, even the most outstanding toolkits alone are not likely to yield sustained results without this somewhat obligatory focus.
3. While solid fundraising experts are an essential ingredient, finding them is not easy with many consultants applying “off the shelf” approaches that do not take into account unique organizational challenges. Consultants need to be thoroughly vetted before being engaged.
4. The amount of money needed to retain fundraising experts and show real results within 18 months is relatively small, e.g., as little as \$25,000-\$35,000 per year. The Project found that there’s not always a direct correlation between the level of investment and outcome; some groups receiving a \$25,000 grant increased their revenue and donors more than groups receiving \$150,000 to \$200,000.
5. The key challenge facing LGBT organizations appears to be not embracing a “culture of philanthropy” in which fundraising is a shared value for all board and staff. This contributes to high rates of fundraising staff turnover, a lack of investment in professional development for fundraising staff, difficulties in engaging boards in fundraising, and inadequate data management systems (and the related inability to segment donor lists).
6. While the Trump presidency has not changed their priorities, it is motivating LGBT donors to increase their giving to LGBT organizations. Because LGBT people—donors and non-donors alike—hold their organization in such high regard, there is enormous growth potential.

2016

Fundraising consultants continue work with the two cohorts

Movement Advancement Project (MAP) begins producing detailed analyses of six specific LGBT donor communities

MAP completes report on the development capacities of 35 organizations

Anti-LGBT forces introduce a record 144 anti-LGBT bills in state legislatures

Donald Trump is elected president

2017

Phase 2 work with the two cohorts wraps up and final reports with findings and recommendations completed

MAP completes “deep data dive” reports

Phase 3 “Silver Linings” research begins with baseline surveys and focus groups. Report on findings and recommendations issued

Phase 4 “Taking it on the Road” begins with two presentations

President Trump issues order banning transgender people from serving in the military

Trump administration begins reversing pro-LGBT policies secured under the Obama Administration

2018

Phase 4 “Taking it on the Road” continues

Trump administration continues to reverse pro-LGBT policies secured under the Obama Administration

US Supreme Court waffles on whether private businesses may refuse service to gay couples

2019-2020

Phase 4 “Taking it on the Road” continues

Final Giving Project report issued

US Supreme Court will decide if existing federal laws protect gay and trans people from employment discrimination

The Project was able to produce in-depth analyses of six subpopulations of LGBT donors:

- women
- high wealth
- transgender
- people of color
- younger
- older

## What did the Project Produce?

1. An extensive body of research about current and potential LGBT donors, including detailed demographic information, motivational analyses, resonant messaging of different subpopulations of the LGBT community.
2. A comprehensive library of LGBT-specific fundraising resources, including materials on Board training, fundraising planning, and donor relationship building.
3. Multiple donor research reports about key sectors of the LGBTQ community.
4. A framework for future efforts to increase movement and organizational fundraising, including a highly successful, low cost approach using fundraising consultants.
5. Reaching more than 100 LGBT additional organizations through an 18 month-long series of seminars, workshops, and presentations.

### Phase 1—Research Overall Donor Characteristics & Motivations

- There were several significant differences between “general population” LGBT people and those that were known donors to LGBT groups, including lower education and income levels, greater “religiosity,” much less politically oriented, more likely to think other causes are more important than LGBT ones.
- There were relatively small differences between the “general population” respondents and known known donors about the most important priorities for LGBT organizations to address, with working for equal rights generally, ending workplace discrimination, and winning marriage equality being the top three. A Project-supported survey conducted after the *Obergefell* decision in 2015 and marriage equality being off the table showed that the remaining priorities for donors remained the largely the same as the first studies.
- Both general population LGBT donors and known donors have very favorable opinions of LGBT organization.
- There were multiple potentially “winning” message frames for LGBT organizations to use in fundraising.
- There were significant differences between general population respondents and known donors about *message frames* that motivate giving. For example, more than two-thirds of general populations were compelled by the “We’re no different” message, compared to less than half of known donors.
- There are huge opportunities for additional planned giving, with between 36% and 46% of all respondents who had not already included a LGBT group in their will saying they were very or somewhat likely to do so. It is estimated that **\$270 billion** in wealth will be transferred as the “Stonewall Generation” passes on over the next 10 years.

Fundraising challenges are rooted in a lack of leadership and support for a culture of philanthropy.

## Phase 1—Research Subsets of LGBT donors

Because of the huge number of respondents to the known donor survey, the Project was able to produce in-depth analyses of six subpopulations of LGBT donors, including women, people with high household wealth, transgender people, and people of color, and younger and older donors. (See page 19). These studies have a wealth of information that can be useful to groups with large donor or prospect lists and the capacity to segment those lists. Unfortunately, most LGBT groups do not meet these criteria.

## Phase 2—Testing Research through a Cohort Model

The goal of this phase was to develop a set of best practices that could be shared across the LGBT movement and grow its fundraising capacity. Nine LGBT organizations broken into two cohorts participated.

**Extremely Positive Results!** Between June 2015 and December 2016, **the nine organizations raised \$2.58 million more than they had in the baseline period prior to the project, a 33% increase in dollars raised.** The median change in contributed revenue was 17% and the average was 37%.

**Common Challenges.** While the bottom-line results were tremendous, critical and common challenges among the groups surfaced, including:

- Fundraising challenges are rooted in a **lack of leadership and support for a culture of philanthropy.**
- **Turnover** among key fundraising staff, including executive directors and directors of development, the two main “point people” involved in the project
- Lack of investment—or, often, lack of the *ability* to invest—in **professional development** for fundraising and data management staff
- Inadequate **data management systems** and/or systems that were not being used their fullest potential to effectively segment, track, and analyze donor and prospect data

## What We Learned

- Organizations with similar missions and budget sizes do not always recognize that they have shared common challenges and opportunities.
- Convening the participating organizations early on and during the project is important to the project’s success.
- Organizations should not be selected to participate in these kinds of projects; they should be required to apply and demonstrate their commitment.
- All participating organizations should be provided the same level of expert fundraising assistance, rather than prioritizing “anchor” groups.
- It takes 18 months, not 12, to start to see results.





How did the election of Donald Trump affect donor motivations and attitudes?

TRULY SAFE

was the most compelling message

9 IN 10

individuals who had an existing connection with an LGBT organization were highly active in some form of civic, political, and/or philanthropic engagement

36%  
of known donors

23%  
of general populations donors increased their LGBT giving



Respondents felt markedly less optimistic than they did the year preceding the election

### Phase 3—Post Election “Silver Lining” Research

This phase involved additional qualitative and quantitative research to better stand if or how the election of Donald Trump might have affected donor motivations and attitudes. It was called the “Silver Lining” phase because the Project hoped the research would help smaller LGBT organizations see a big boost in fundraising, as some larger organizations such as the ACLU experienced post-election.

The research identified “Truly Safe” as the most compelling message for general population LGBT respondents and known LGBT donors:

**“Truly Safe”**—*The prejudice, hatred, and violence toward LGBTQ people that the election of Donald Trump unmasked are stark reminders that our community is still under threat. That’s especially true for transgender people, LGBTQ people of color, and LGBTQ immigrants. The fear and ignorance behind these threats are deeply embedded in this country and won’t go away on their own. We must fight for change, locally and nationally, because none of us will be truly safe until we all are.*

The research also found:

- Since the election, individuals who had an existing connection with an LGBT organization had been highly active, with nearly 9 in 10 reporting some form of civic, political, and/or philanthropic engagement
- More than one-third (36%) of known donors and nearly a quarter (23%) of general populations donors said they had already increased their giving to LGBT organizations.
- Respondents felt markedly less optimistic than they did the year preceding the election that the challenges facing the LGBT community will be resolved in the next few decades

### Phase 4—Taking it on the Road

This phase involves a series of workshops to take disseminate key findings and effective fundraising strategies as broadly as possible. As of the end of 2019, eight workshops or institutes have been conducted for a wide range of organizational leaders, including those serving LGBT people of color, LGBT community centers, and LGBT organizational development directors. Based on feedback received through direct evaluations, participants found the content very helpful, rating the presentations around a 4.5 on a scale of 1-5 (where 5 is “very helpful”) and sharing positive feedback such as “This is the kind of nuts and bolts stuff that I came to the [CenterLink] Summit to get.”

### Conclusion

The following details the project’s work and findings with specific recommendations for action whenever possible.



## PHASE 1: QUALITATIVE & QUANTITATIVE RESEARCH

### PHASE 1: QUALITATIVE & QUANTITATIVE RESEARCH

To develop a thoughtful approach to broadly increasing LGBT movement fundraising, a convening of experts in fundraising, gay market research and polling, and individual donor motivation was held in Chicago in November 2011.<sup>1</sup> The experts agreed that there was, indeed, significant potential to increase LGBT giving above current levels and recommended that: (1) the primary target/focus for research in the near-term should be on LGBT *people*, as opposed to non-LGBT people who support—or might support—LGBT cause; (2) the research should be iterative building on qualitative and quantitative methods; and (3) field-testing would be essential, as there was no way to guarantee that something learned through research will play out in the real world.

There was significant enthusiasm behind embarking on deep research to understand donor motivations and identify particularly resonant messaging. This was due in large part to the breakthrough that research had delivered for the marriage equality movement. There, after several years of painstaking work, the movement learned how to talk about marriage in terms of “love and commitment” (rather than “rights and responsibilities”) and how to engage conflicted voters in thoughtful ways. As a result of this shift, the marriage equality cause began winning marriage-related ballot measures after many years of crushing defeats and public support for the freedom to marry grew rapidly.

#### REFLECTION:

The Project’s focus on deep research was based on the extraordinary breakthrough such work had produced for the marriage equality movement.

In hindsight, the Project should have had an equal focus on finding ways to address the weak fundraising capacities of so many LGBT groups.

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<sup>1</sup> The experts at the convening were: Margaret Conway, Principal, ConwayStrategic; Jason Franklin, Executive Director, Bolder Giving; Kris Hermanns, Development Director, National Center for Lesbian Rights; Ineke Mushovic, Executive Director, Movement Advancement Project; Amy Simon, Principal, Goodwin Simon Strategic Research; Drew Westen, Principal, Westen Strategies; and Bob Witeck, CEO, Witeck•Combs.

The Project's concept paper was presented to 40 executive directors attending the 2012 Creating Change Conference for feedback. The EDs all strongly agreed that the Project would be valuable—and help them with one of their greatest challenges.

### **Selection of research team and scope of work**

Following the convening, a Coordinating Committee was created and began working on a request to obtain proposals (RFP) from polling research firms.

The Project's concept was presented to 40 executive directors and development directors at the Creating Change conference in February 2012. Perhaps surprisingly (because fundraising can be a competitive issue), there was real enthusiasm and offers to share data.

The RFP was distributed in late April 2012. The Coordinating Committee received 10 solid proposals and three finalists made in-person presentations to the coordinating committee. In August 2012, a research collaborative of Goodwin Simon Strategic research, Fenton Communications, and Wild Swan Resources was awarded at \$300,000 to conduct the qualitative and quantitative research.

### **Phase 1—Qualitative Research**

The qualitative work, which concluded in June 2013, included:

- Monitoring social media for discussion of LGBT fundraising and donor feedback (“social listening”).
- A preliminary psychological analysis based on social listening and a literature review.
- An audit of the ways in which 13 LGBT organizations took and responded to donations ranging from \$25 to \$500.
- One facilitated “roundtable” conversation with high-end donors.
- Six focus groups with both current LGBT donor and LGBT individuals who were not donors to LGBT groups.
- In-depth interviews with development staff at LGBT organizations.

### **Social listening and preliminary psychological analysis—key insights**

The social listening work involved tracking LGBT donor giving/fundraising content and discussions on a wide range of on-line channels, including Facebook, Twitter, blogs, on-line forums, on-line news and resulting comments, and Equality Giving.

Through this process and a literature review, the team developed a set of insights related to LGBT giving:

#### ***(1) Preliminary psychological analysis***

The research team determined that forming and maintaining a genuine relationship with the donor seems to be core to fundraising success. Within such a “genuine relationship”:

## Donor Motivation Themes

- Healthy self-interest is a strong motivation for both parties.
- Identification and values congruence is an especially strong component for the donor.

The donor-organizational relationship, in fact, forms a “psychological contract” in which both the donor and the nonprofit have expectations and obligations. This “contract”—even if not consciously experienced by a donor—comprises a critical component of the relationship for the donor. In addition, donating can trigger complicated feelings in the donor about their identity and considerable ego needs, most prominently:

- Feeling genuinely valued and respected.
- Having identity needs and core values mirrored back to them.
- Reciprocity (balance of giving and receiving).
- Trust in the organization (accountability, transparency, honesty).

### (2) Identifying a critical moment

An additional crucial insight comes out of this concept of a “psychological contract” between donors and organizations: *The initial moment of donating, especially online, is emotionally potent for the donor and a critical opportunity for the organization to make a good impression as well as set the stage for developing a relationship.* This moment poses both great opportunity for the organization to forge such a contract—and, at the same time, perhaps the greatest peril for failing to make that authentic connection losing the opportunity to turn a one-time donor into an on-going contributor.

### (3) Additional insights

The team also identified insights into various donor motivations—not mutually exclusive but distinct—that drive donor behavior, such as:

- Some donors have an identity as an activist and the emotional focus center on antagonists seen as “bigots” or “wing-nuts”: *“I can change the world through **activism.**”*
- Some donors have identities as caregivers, an archetype focused on nurturing and protecting people and community: *“I have a **responsibility** to help protect LGBT communities, especially youth.”*
- Some donors are drawn to organizations based on other identities—like race, gender, sexual orientation, political persuasion: *“I want to **see myself**—and those I care about—in the organizations I support.”*
- Donors react strongly to dramatic real-world events or emotionally powerful narratives crafted by people and organizations: *“Donating makes me feel like I am **doing something**—especially when I feel strongly that something is wrong in the world.”*
- Being seen, whether it is to foster a sense of belonging or to enhance social status, is an important part of donating: *“I donate because I want to **be seen in the community.**”*

*I can change the world through **activism.***

*I have a **responsibility** to help protect LGBT communities, especially youth.*

*I want to **see myself**—and those I care about—in the organizations I support.*

*Donating makes me feel like I am **doing something**—especially when I feel strongly that something is wrong in the world.*

*I donate because I want to **be seen in the community.***

#### REFLECTION:

In hindsight, the disappointing results of the audit should have triggered the Project to devote greater resources to helping organizations address the deficiencies it uncovered. The basics simply weren't being done well. This could have involved an "emergency" alert, webinars, and a offer to conduct audits for requesting groups, with follow up assessments at regular intervals.

Two other telling observations made by the researchers apply to all nonprofit organizations:

- Donors hold narratives of trust and deceit, and worldviews about how organizations should be run: *"I don't donate when I feel like organizations are **not efficient, effective or honest.**"*
- Because narrative is the single-most power form of communication: **Storytelling is critical (and too often absent)**

#### Audit of handling of first-time gifts

The research team then looked at how LGBT organizations treated first-time gifts and to what extent their donor cultivation and stewardship processes reflected the above insights. This audit involved the researchers making donations (that masked their identities) to 12 LGBT organizations in amounts ranging from \$25 to \$500 (some groups received multiple donations). The groups included large national, statewide advocacy, and some issue-specific organizations.

The researchers evaluated each group's process based on seven criteria, including whether communications from the organization included storytelling or personal stories, the on-line experience, the timeliness and content of the thank you, and whether the organization maintained steady and consistent communications with donors.

The results were mixed at best. Out of 35 total possible points, one group received 30 points, five groups were in the 20's and six had 14 points or below. Common evaluator comments for the lower-scoring groups included:

*Received automatic thank you but no letter. Sent a barrage of emails after donation that felt overwhelming.*

*Never explains how dollars are used.*

*First received fundraising appeal and then received generic thank you letter.*

*No stories anywhere.*

*Never asks about donor interests or creates a clear picture of the importance of an individual donor.*

Comments for higher scoring organizations, on the other hand, included:

*Received automatic thank you immediately and personally signed letter one week after donation; have not yet been explicitly asked for an additional donation; donor communication communicates value and appreciation.*

*Nearly every communication provides specific examples of how donations are used and communicates value of donation to the org.*

*Concrete, visual, easy to read, plain-spoken and compelling.*

The results of audit were presented at a briefing for executive and development directors of organizations that had expressed interest in the Project at the 2012 Creating Change Conference in Baltimore. Most attendees expressed surprise that the results were in many ways so far short of well-known development practices.

## Focus groups

The Project's focus groups were conducted by Goodwin Simon Strategic Research (GSSR) from February through April 2013, beginning with a roundtable discussion among donors giving more than \$5,000 per year to LGBT groups.<sup>1</sup> Drawing on what was learned at that discussion, a total of six focus groups were held in New York City and Denver. Four were with non-donors and two were with current donors. Separate groups were held for men and women, and each had a mix of participants by age, religion, ethnicity, country of origin, employment, education, ideology, and political party (although most were self-identified Democrats and independents). The focus groups included 23 lesbians, 28 gay men, three bisexual women and two bisexual men.<sup>2</sup>

The groups' facilitators sought to elicit participant views on a wide range of issues, including the most important problems or issues in LGBT community, motivations for giving, reasons for giving to chosen organizations, the impact of lesbian, gay, and bisexual identity, and reasons for not donating or stopping donations. In addition, participants provided feedback on sample fundraising appeals.

Like the social listening / psychological analysis, GSSR identified different categories of donors, including "Memorializers;" "Relaters;" "Community Builders;" and "RePAYERS." The firm also identified another category of givers who want to make an impact or difference at either the national level ("Game Changers") or at the local level ("Local Impacters"). Finally, some were "Social Givers" who "give because they want to go to the social event, take part in a walk, or join in the parade for social reasons—to have fun."

## Motivators to Give or Not Give

There were a wide range of reasons why participants gave to specific causes, such as:

1. supporting counseling for youth experiencing bullying because those services weren't available when the participants first came out;
2. backing advocacy organizations focused on civil rights because they provide the donor with a "voice;" and
3. for participants of color, supporting people of color-focused groups because of the unique needs of LGB people of color, the role of race in the LGB community, and because most of the non-white participants considered their race a more defining aspect of their identity than being gay or bisexual.

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<sup>1</sup> Unfortunately, the Project was unable to organize a focus group with priority segment: LGBT people of means who were *not* giving to LGBT organizations. The traditional focus group model—where individuals receive a modest stipend to participate—didn't work for this group of donors. Similarly, while it was possible to identify individuals falling into this category, the Project couldn't find a non-disparaging way to invite them to a discussion (i.e., "We know you are a generous contributor of the opera and art museum, and we'd like to find why you are not supporting LGBT causes").

<sup>2</sup> Transgender individuals were not part of these focus groups because the firm that was retained to recruit participants did not then have transgender people in its pool.





There were also a number of reasons why participants were not giving or had stopped giving, which were largely similar to the social listening findings. They included donor perceptions that (a) groups were misusing funds, spending too much on administration or “glossy” flyers or fancy events; (b) organizations not being inclusive of transgender people; (c) for lesbians, organizations that appears to focus more on gay men than lesbians; and (d) for participants of color, organizations ignoring racial issues or “too focused on white people.”

### Opportunities

At the same time, the participants associated LGBT organizations almost exclusively with positive words and phrases. When asked to rate LGBT organizations generally on a 5-point scale (where a “5” indicated a very favorable view), the average rating was a 4.0. This ran contrary to one of the original Project hypotheses: that donors had a dim view of LGBT nonprofits. Finding that largely *not* to be true was reassuring, notwithstanding the less-than-stellar results of the donation audit.

GSSR also found that the ways in which LGB people connect with giving were “heavily impacted” by their individual experiences of being an LGB person, including the age when a person came out, the level of acceptance or rejecting experienced from family and friends, personal experiences with discrimination, etc. GSSR also found several other aspects of a person’s identity had a large influence on the ways in which LGB people think about giving, such as religion, recent immigration history, and race. If an LGBT organization had access to such information, it could hypothetically find a better way to reach particular segments of the overall LGBT population.

### Recommendations

Based on its focus group findings, GSSR made a series of recommendations for further research, such as testing segmented appeals based on psychographic attributes that would make certain causes more desirable to specific individuals, exploring how appeals can make a deeper connection by recognizing the multi-faceted aspects of individuals’ lives (e.g., race, gender, immigrant, church-goer), and examining how to build a sense of urgency around discrimination. The firm also made recommendations about tactics to explore in fundraising letters and communications, including making a personal connection, avoiding language that undermines a personal connection (such as “battle,” “threat,” “hate-filled”), and promoting an organization’s fiscal prudence.

## Known Donor Survey Respondents (N=6,755)

### DEMOGRAPHICS

- Well educated (53% attended graduate school)
- Predominantly white (86%)
- Older (40% 55 or older)
- Three quarters no children (77%)
- Nearly half no religious affiliation (47%)
- Fairly wealthy (67% with incomes of over national median of \$60,000 per year)

### OTHER CHARACTERISTICS

- LGBT identity considered important (74%)
- Majority living on the West Coast and Northeast (60%)
- Very out:
  - 92% consider themselves out
  - 53% out to important people in their lives
  - 62% out at work
- Heavily Democratic (78%) and “Very Liberal” (50%)
- Politically active (72% had given to a political party or candidate or ballot measure campaign)
- A majority with a will or trust (54%)

## Phase 1—Quantitative Research

Once the focus groups and the briefing were completed, the Project moved to an ambitious effort to test learnings and hypotheses through quantitative research. This phase, which concluded in October 2017, included:

- A survey of current and recently lapsed donors to 56 LGBT organizations; more than 8,000 individuals completed it.
- A “general population” survey of just over 1,200 LGBT donors and non-donors.
- Six reports focusing on specific subpopulations of donors to help organizations tailor their fundraising strategies, including ones on LGBT Women; LGBT People with High Household Wealth; and Millennials, GenXers, and Older Adults.

In addition, the Project helped spark two other related projects. The first was a survey conducted by MAP of the development capacities of 35 LGBT organizations (supported by the Haas, Jr. Fund). The second was a major initiative to understand the potential of LGBT planning giving and ways to take advantage of that potential (spearheaded by the Horizons Foundation). These are briefly described below.

### Survey of current donors (N = 6,755 donors)

#### Background

This effort involved asking organizations to share their donor lists to an independent firm for one-time use. The firm, in turn, would de-dupe the lists and work with the Project’s consultants to distribute an in-depth survey to the combined lists. This was a daunting challenge, given that donor lists are closely held and rarely shared.

Somewhat surprisingly, there was wide enthusiasm for the Project. Fifty-seven (57) groups agreed to participate (see Appendix 1). While this was going on, the survey tool itself was developed through an involved, iterative process with the research team and Coordinating Committee.

The survey was finalized in October 2013 and was fielded for four weeks. It was emailed to 303,370 individuals (randomly selected from a de-duped pool of 445,000 records with email addresses). More than 8,000 individuals completed the lengthy survey, an impressive response rate of 3%. Of this total, 6,755 (81%) identified as LGBT, the Project’s target audience.

Because of the enormous number of responses, the margin of error rate data supplied by LGBT respondents was just +/-0.85%. Similarly, this allowed for a relatively small margin of error for analyses of the responses from specific subgroups, such as older LGBT people, women, and wealthy households. See Page X.

The survey generated literally hundreds of data points, including detailed information about donors, including demographics (e.g., race, age, gender, sexual orientation, gender identity and political affiliation, etc.), the importance of LGBT identity in their lives, and views on the most important priorities for LGBT organizations to address. Among other notable factors, the



# 5 GIVER Archetypes

The Activist

The Advocate

The Game Changer

The Caregiver

Sage

respondent pool was extremely well-educated, fairly wealthy, and very liberal. (See box.) The survey also probed crucial donor preferences and beliefs, including:

- Giving priorities by organization type (national, state, local),
- Giving priorities by type of work,
- Ways of donating (e.g., via email, event, mail, etc.),
- Reasons not for giving more and the main reasons holding donors back from giving,
- Reasons for stopping or giving less.

## Messaging and motivations

The survey queried respondents in three different ways to assess what drove donors to make giving decisions: message frames; archetypes; and narratives.

### (1) Message frames

The survey tested eight different message frames (based on the qualitative research) that might motivate donors, such as “Equality,” “Stronger together,” “Who will care for us?” “Pride,” and “Legacy.” All seven of the message frames were judged to be either “extremely compelling” or “very compelling” by well over half of donor respondents. The “Equality”<sup>1</sup> and “Stronger together”<sup>2</sup> frames had the highest rankings for LGBT respondents with 83% and 80%, respectively, saying the frame was extremely or very compelling. Three others were rated “compelling” by at least 70%: “We’re no different,” “American freedom,” and “Who will care for us?”<sup>3</sup>

This relatively close clustering of five of the seven tested frames suggested that there are multiple potentially “winning” messages for LGBTQ organizations to use in their fundraising. That was good news. The less good news, however, was that there was little indication that any one message frame stood out so much as to give the Project a clear messaging insight—a “magic bullet”—to pass on to LGBTQ nonprofits.

Somewhat greater differences began to appear when the respondent pool was sliced into particular population segments. Even then, however, most differences were small. For example, there were differences between LGB and transgender respondents on the different frames, most markedly with respect to the “Who will care for us?” frame, which 16% more of transgender respondents found compelling than cisgender respondents. Otherwise, no other difference exceeded seven points. There were also minimal differences between the responses of people of color and white people, nor between women and men.<sup>4</sup>

<sup>1</sup> Equality Frame: “The United States is built on the idea of equality for all. Yet, for too many lesbian, gay, bisexual and transgender Americans, equality is not a reality. That is why I give to LGBT organizations.”

<sup>2</sup> Stronger Together Frame: “I believe we are stronger together than alone. I give to LGBT organizations to make sure that we are able to make progress on behalf of all gay, lesbian, bisexual and transgender people”

<sup>3</sup> Who Will Care for Us Frame: (LGB version) “As lesbian, gay, bisexual and transgender people, we should take care of one another, because too many of us still face rejection from our families or discrimination in our lives. If we don’t support on another and our community, who will?”

<sup>4</sup> These differences were explored in depth in the series of six in-depth analyses produced by the Movement Advancement Project and described below on page 19.

## (2) Archetypes

Based on the qualitative research, the survey also used five “archetypes” to assess what was driving giving. It asked whether a donor would be more likely to give based these statements:

**The Activist:** “We will only create change in American if we fight back against intolerance and hate.”

**The Advocate:** “We must be advocates for our own equality—recognizing the dignity that comes from standing up and being counted.”

**The Game Changer:** “To make progress, we must do what some say cannot be done: Transform our nation’s laws on behalf of gay lesbian, bisexual, and transgender people.”

**The Caregiver:** “We must care for those less fortunate than us, including gay and transgender youth who are bullied and lesbian, gay, bisexual, and transgender people who face employment discrimination.”

**Sage:** “We must work to change the hearts and minds of Americans—from politicians and pastors to mothers and fathers.”

Like the motivational finding, the differences between these archetypes were relatively small—only 8 points divided the most successful—“The Activist” with 83% saying it would make them more likely to give—and the least successful—“Sage” at 75%.

## (3) Narratives

The survey tested narratives to see if donors would be more compelled by a stories involving (a) a young trans man being kicked out of home when he transitioned or young gay man in the identical circumstances; (b) a lesbian who was the victim of a hate crime or a transgender woman who was similarly victimized. Between 73% and 75% of the donors said both narratives would make them more likely to give with virtually no difference when the subject was trans or gay/lesbian.

## Planned Giving

The survey revealed significant opportunities for planned giving. Remarkably, 16% of respondents indicated that they had *already* included at least one LGBT organization in their estate plans. An additional 36% said that they were “very” or “somewhat” likely to make such an LGBT legacy gift in the future. When told that planned giving was not restricted to the wealthy and that “every gift size matters, even a few hundred dollars,” one in five of those who had previously said they were not likely to make a planned gift changed their minds.

The results of the survey of known donors were shared with LGBT organizations at the 2014 Creating Change Conference in Houston and with other funders at the 2014 Funding Forward Conference sponsored by Funders for LGBTQ Issues.

Results of the “Big Gay Survey” were shared with LGBT organizations that participated in the survey of current donors through a webinar in May 2014.

The survey also tested potential planned giving message frames. The three top ones were:

- To help future LGBT generations (53%).
- To continue my commitment to an organization I care about (49%).
- To continue my support for the LGBT community (46%).

### Dissemination and use

The survey results—summarized in a 92-slide PowerPoint presentation—were shared with the 57 organizations that submitted donor data in a webinar in December 2013. In addition, GSSR prepared customized reports for each organization with the organization’s unique donor results. The groups were also offered access to all the underlying cross tabs of the data (nearly 10,000 pages).

By and large, the groups expressed interest in the survey findings but had a difficult time understanding how to make use of them in day-to-day operations. Only a couple of the larger groups had the resources to carefully examine their own donor data and look for opportunities to reach specific subsets of donors within their current donor base. At this time, the Coordinating Committee did not fully appreciate the fact that many groups did not have the capacity to segment their donor lists to target individuals based on factors such as race, age, education, religion, or having children at home (let alone specific donor interests).

### General LGBT population survey (N = 1,213)

For three weeks starting in late February 2014, GSSR fielded an online survey that was aimed at people who self-identified as LGBT and who had made charitable donations or a planned gift to any cause over the preceding two years. Dubbed the “Big Gay Survey,” its goal was to look for ways that LGBT organizations could reach beyond current donors (who, as previously stated, represent at least 96% of those identifying as LGBT). A total of 1,213 respondents completed the survey, of whom just over half (54%) had made a contribution to a LGBT cause and a third who said they had not donated to a LGBT cause but would consider it. Ten per cent (10%) said they were not inclined to make a donation. The survey had a margin of error of +/-2.8% (with a higher margin of error for subgroups). The survey instrument was based in large measure on the one used for current LGB donors.

The general population respondents differed from the known donors in significant ways:

### Demographic factors

- Less highly educated (19% completed graduate school vs. 53%)
- More people of color (23% vs. 14%)
- Younger (47% between 18-39 vs. 26%)
- More likely to have children (30% vs 22%)

## General LGBT Population Survey Respondents (N=1,213)

### DEMOGRAPHICS

- Less highly educated (19% completed graduate school)
- More people of color (23%)
- Younger (47% between 18-39)
- More likely to have children (30%)
- More likely to be religious (32%)
- Less wealthy (59% with income under \$60,000 per year)

- More likely to be religious (32% no religion vs. 47%)
- Less wealthy (59% under \$60,000 per year vs. 33%)
- Less concentrated on the coasts (43% West Coast & Northeast vs. 60%)

### Other characteristics

- Fewer identified as being Democrats (52% vs 78%) Less likely to be out:
  - At all (72% vs. 92%)
  - To important people in their lives (32% vs 53%)
  - Out at work (32% vs. 62%)
- Much less politically oriented (32% had given to a political party, candidate or ballot measure campaign vs. 72%)
- More likely to think problems faced by LGBT people will be solved in the next 20 to 30 years (71% vs 60%)<sup>1</sup>
- LGBT identity less important (58% important vs. 74%), even though the degrees of difficulties they experienced coming out were virtually identical to known donors
- More likely to think other causes are more important than LGBT ones (44% vs. 28%)
- Less likely to have a will or trust (37% vs 54%)
- Less likely to say the following should be important priorities for LGBT organizations to address:
  - Ending workplace discrimination (53% vs. 63%)
  - Challenging and changing laws to improve the lives of LGBT people (46% vs. 61%)

### Messaging and archetypes

Respondents to the general population survey felt more compelled by different message frames than those in the LGBT donor survey. Two differences stood out the most—responses to the “We’re No Different” and “American Freedom” message frames (67% vs 49% and 60% vs 50%, respectively). In addition, the three strongest message frames for those who had not previously given to a LGBT cause but would consider doing so were:

- “We’re no different”<sup>1</sup> (67% vs. 49% for known donors)
- “American Freedom”<sup>2</sup> (60% vs. 50% for known donors)
- “Equality”<sup>3</sup> (57%)

<sup>1</sup>“I’m no different than anyone else. I work hard, pay taxes, and try to make my community a better place. That’s why, as a lesbian/gay person/bisexual person, I want to be treated the same as everyone else. That’s why I give to LGBT organizations.”

<sup>2</sup>“Freedom is one of America’s most enduring values. It’s a word that gets thrown about a lot, but when you don’t have it, you know it—like when you’re not able to build a life with the person you love. That’s why I give to LGBT organizations.”

<sup>3</sup>“The United States is built on the idea of equality for all. Yet, for too many lesbian, gay, bisexual and transgender Americans, equality is not a reality. That is why I give to LGBT organizations.”

Somewhat surprisingly, there were only minor differences between the general population respondents and known donors in their responses to the “archetype” statements that motivate giving (e.g., The Activist, The Caretaker, The Advocate, etc. See page 9). The Activist archetype was ranked highest in making a person more likely to donate to an LGBT organization (64% vs. 61% for known donors). The next highest was The Caregiver (59% vs. 54%).

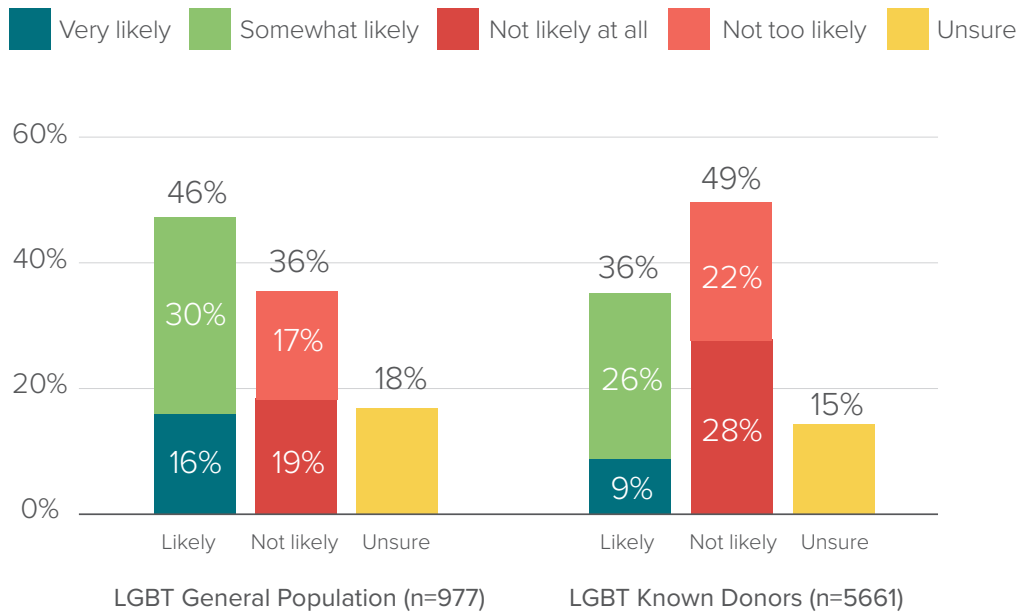
### Planned Giving

Somewhat surprisingly—given the much greater reported wealth of the known donors—was the relatively small difference in the proportion of respondents who had already arranged a planned gift to an organization (LGBT or otherwise)—46% of known donors vs. 37% of general population donors. On the other hand, *more* general population respondents (who had not already made a planned gift commitment) said they were “very likely” or “somewhat likely” to make a planned gift to an LGBT organization (46% vs. 36% of known donors). None of the reasons offered by general population donors for making a planned gift exceeded 50%; the highest was “It’s important to help future LGBT generations” at 47% (compared to 53% of known donors).

Like the known donor survey, the general population survey yielded reams of never-before-uncovered data. Once again, the challenge was how to make it all useful to LGBT organizations in reaching out to prospective donors.

### Likelihood of Planned Giving to an LGBT Organization

(among those who have not made a planned gift or are unsure)



## Understanding LGBT Donors Reports—Deep Data Dives

To make the data more accessible and useable for LGBT nonprofits, the Project engaged the Movement Advancement Project (MAP)<sup>1</sup> to further disaggregate the data with the aim of providing opportunities for organizations to tailor their fundraising strategies to better reach and appeal to specific donors. During 2016 and 2017, MAP produced six subpopulation-specific reports<sup>2</sup>:

- LGBT Women
- LGBT People with High Household Wealth
- Millennials, GenXers, and Older Adults
- LGBT People of Color
- Transgender People
- LGBT People Living in Rural Areas

The reports contained key findings and actionable insights for each subpopulation, including:

- Demographics and financial information
- Opinions of LGBT organizations
- Donation message frames
- Issue priorities
- Motivations for giving
- Planned giving

### Selected Highlights from Deep Data Dives

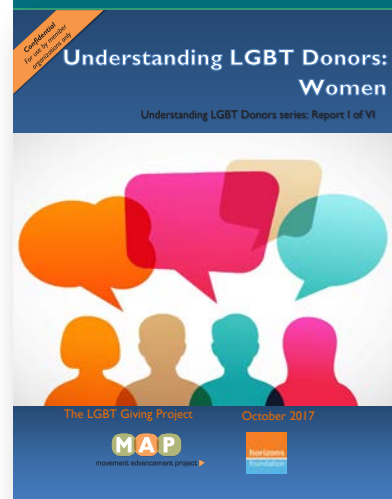
The following describes just some of the findings and advice from these reports; more findings appear in Appendix 2.

#### Women (N = 2,277)

- *Opinion of LGBT organizations:* LGBT women were more likely than LGBT men to have a “very favorable” opinion of LGBT organizations; however, they were far more likely to think LGBT organizations are too male-dominated. They were also more likely to state that they stopped donating to an LGBT organization because the organization failed to prioritize lesbian issues. This suggests that an organization’s ability to highlight LGBT women in leadership positions in the organization (among both staff and board) and/or demonstrate a commitment to programs that impact LGBT women may increase a female-identified donor’s likelihood of giving.

<sup>1</sup> Founded in 2006, MAP is an independent, nonprofit think tank that provides rigorous research, insight and communications that help speed equality and opportunity for all. Its reports, resources, and messaging guidance to help LGBT organizations frame issues and run communications campaigns that change hearts and minds.

<sup>2</sup> MAP’s reports were subsequently reviewed by the fundraising firms retained to implement Phase 2 of the Project, which resulted in some modifications. All six reports were issued in final form in October 2017.



The main reasons cited by High Household Wealth Donors for decreasing or ending donations were (a) an impression that the organization was run inefficiently or seemed ineffective; and (b) receiving too many asks for donations.

### High Household Wealth (N = 2,014)

(“High household wealth” was regarded as wealth of \$750,000)

- **Stopping giving:** The main reasons cited by HHWD for decreasing or ending donations were (a) an impression that the organization was run inefficiently or seemed ineffective; and (b) receiving too many asks for donations. It’s possible that HHWD may have higher expectations for efficiency and personalized asks because they are frequently solicited by larger, perhaps non-LGBT organizations with dedicated major gifts departments that engage very smoothly with them. Over-solicitation of WWHD may contribute to the impression of an organization being run inefficiently.

Organizations are encouraged to increase personalization and, once a donation is secured, ensure that another ask does not too quickly follow and have other non-ask “touches” with these donors (such as an invitation to a non-ticketed event). They should also demonstrate how funds are used along with tangible outcomes.

### Rural Donors (N = 684)

- **Liberal leanings:** Just as many LGBT people in rural areas identified as “liberal” or “very liberal” as urban donors (84% vs. 84%). This suggests that organizations do not need to “tone down” their appeals that focus on progressive values and use liberal messages to reach rural donors.

### LGBT People of Color (N = 783)<sup>1</sup>

- **Issue priorities:** LGBT people of color were much more likely to list social service provision as an issue priority. In fact, LGBT people of color were more likely to support organizations to the extent that they prioritize community services, including services for LGBT youth and LGBT older adults specifically.

Organizations may want to highlight the direct social services they provide in outreach to LGBT people of color, if possible. Organizations that do not provide social services may want to highlight ways in which their work has impacted the availability and provision of those services (through litigation, funding, partnership, or other avenues).

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<sup>1</sup>This report was based on the responses of 783 individuals who self-identified as LGBT people of color, comprising about 12% of total respondents. Of these, 154 identified as African American/Black (20%), 202 identified as Hispanic/Latinx (26%), 108 identified as Asian/ Pacific Islander (14%), and 225 identified as mixed race (29%). Given that other data show that people of color make up at least one-third of the total LGBT population (vs. 12% of the survey respondents), the report’s finding could not be interpreted as representative of all LGBT communities of color. The low representation of people of color may be due to the overall lack of engagement of LGBT people of color as donors to the participating organizations.

Of the 56 organizations that participated in the survey, less than five had a specific organizational focus on a community of color. In addition, according to a 2015 Blackbaud report, Black and Latinx individuals are underrepresented as donors to nonprofits in general, likely because many organizations utilize fundraising models that predominantly cater to and look for white donors (as opposed to Black and Latinx donors being less generous than white donors).

## Transgender People (N = 412)<sup>1</sup>

- **Portion of giving to LGBT:** Although transgender people gave smaller total amounts to LGBT organizations compared to cisgender people, *they were more likely to devote a majority of their overall charitable giving to LGBT causes.* Forty-four percent of transgender people gave a majority of their charitable giving to LGBT causes, whereas only 33% of cisgender LGB people gave a majority to LGBT causes.

This suggests that transgender people prioritize support for LGBT organizations over other charitable causes. To the extent that organizations develop message frames and programming that reflect the concerns and priorities of this subpopulation, transgender people can be a reliable and sustainable source of donations. One route to further develop and strengthen giving relationships with transgender donors may be to encourage existing donors to make personal asks of their community connections.

## Millennials, GenXers, and Older Adults

This report focused on differences across three age groups of LGBT donors: LGBT Millennials (ages 18 to 34; N=934), LGBT Gen Xers (35 to 54; N=2,769), and LGBT Older Adults (ages 55 and up; N=2,920).

- **Issue priorities:** The highest issue priorities among LGBT Older Adults and GenXers were “Ending workplace or employment discrimination,” and “Challenging and changing laws to improve the lives of LGBT people.” Millennials were more likely to rank “Increasing acceptance for transgender people.”

Compared to LGBT Older Adults and Gen Xers, Millennials were far more likely to support efforts by LGBT organizations to prioritize diversity among staff and leadership and to focus more on issues that affect transgender people. Millennials were also more likely to indicate that transgender rights are an issue priority.

When contacting Millennials, organizations should consider prioritizing inclusion and diversity and emphasize political agendas that center on transgender people. Given the date of the survey (before some of the recent, high-profile national attention to transgender issues), this finding may suggest that the Gen X and Older Adult respondents were less familiar with transgender people (research shows that older adults are less likely to personally know a transgender person in comparison to younger populations.) Therefore, organizations may benefit from educational initiatives aimed at increasing familiarity with transgender people among LGB Older Adults.

<sup>1</sup> The relatively small sample size of transgender people (412 respondents, representing 5% of the total), presented limitations on the confidence that could be placed in the findings.

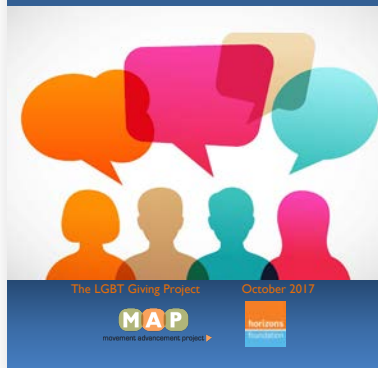
The Deep Data Dive report were shared with movement groups at the 2017 Creating Change Conference.

In addition, each organization that contributed donor data for the 2013 survey of known donors and member organizations of CenterLink and the Equality Federation received access to the reports on a password-protected site.

Confidential  
For use by member organizations only

**Understanding LGBT Donors:**  
Millennials, Gen Xers, and Older Adults

Understanding LGBT Donors series: Report #2 of 6





Storytelling is crucial to eliciting empathy, a precursor to altruism, and to communicating both need and efficacy, but is often absent.

- ***Bisexual population:*** Millennials were far more likely than Older Adults and Gen Xers to identify as bisexual; 30% of Millennials identified as bisexual vs. 13% of Gen Xers and 8% of Older Adults. The research also found that bisexuals are less likely than lesbian or gay people to be “out” to their family, friends, and co-workers. (Only 28% of bisexuals reported being “out” to all or most of the important people in their lives, compared to 71% of lesbian women and 77% of gay men.)

For these reasons, relying on traditional outreach methods (e.g., trading or purchasing LGBT organizations’ mailing lists) may not be the most effective strategy for reaching bisexual people. Organizations should explore alternative ways to contact bisexual donors that also minimize the risk of outing bisexuals.

### Overall Observations from the Quantitative Research

While it is difficult to pull any kind of summary findings from such an extensive amount of data, the Project reached several important conclusions:

1. *There are development capacity issues within LGBT organizations that negatively impact everything from donor stewardship to the online donor experience on organizational websites.*
2. *Messaging matters—but many messages can work*
3. *Storytelling is crucial to eliciting empathy, a precursor to altruism, and to communicating both need and efficacy, but is often absent.*
4. *Populations within the LGBT community have varying priorities*
5. *Donors want to, but often don’t, see themselves reflected in the organizations they give to. Some donors are open to funding particular causes and/or populations, such as elders, youth, or health, but do not do so currently.*
6. *There’s good ground on which to build strong LGBT fundraising, including overall favorable views of organization and overall willingness to donate*
7. *Planned giving presents a significant movement opportunity*
8. *Additional research could be valuable in several areas, particularly for people of color communities.*

### Associated Quantitative Research

In addition, the Project helped spark two related research efforts—one looking to identify capacities and resources of LGBT organizations that contributed to successful fundraising outcomes, and another to understand the potential of LGBT planning giving. These efforts were supported by those involved in the Project in various ways and each contributed to the Project’s goals.

## Development Capacity Survey

The first was an effort to identify specific resources and capacities among LGBT organizations that were most closely associated with successful fundraising, such as high-performing board members, executive director involvement, software programs, donor solicitation methods, etc. To conduct this study, the Haas, Jr. Fund engaged MAP to conduct a survey of groups contributed donor data to the research phase and analyze the findings. Thirty-five groups completed the survey and a 32- page report was released in April 2016 entitled *LGBT Movement Development Capacity Report*. For analysis purposes, the organizations were broken into four groups based on their total revenue. Subsequently, the former director of development at Lambda Legal, John Westfall-Kwang, was retained to review the data and look at groups based on the types of income (e.g., major donors, direct mail, government grants, etc.). Based on the data, Mr. Westfall-Kwang, recommended the following five steps, in order of importance:

- #1 Recruiting fundraising Board Members.
- #2 Starting a major donor program, or for groups with such a program, increasing the entry recognition level.
- #3 Fully capitalizing on revenue strength(s) *before* focusing on new types of revenue.
- #4 Spending additional time on higher dollar donors, including ensuring there is a strategy in place to cultivate, solicit, and steward top funders.
- #5 Asking for planned gifts and, if resources allow, creating a recognition society for those who put the organization in their estate plans.

## Planned Giving Initiative

As noted above (see page 15), the LGBTQ Giving Project surveys found that a significant portion of LGBTQ people have included the LGBTQ community in their estate plans. This was an especially important finding as the community's collective opportunity in planned giving is likely to be unusually great: not only do nearly two thirds of LGBTQ people today have no children, but also members of the highly identified "Stonewall Generation" are in their prime planned giving years.

Inspired in part by these findings, steering committee member Horizons Foundation joined with other movement funders and nonprofit leaders to create a National Task Force on LGBTQ Planned Giving. Underwritten by a grant from the Arcus Foundation, the Task Force documented the extraordinary potential for LGBTQ planned giving—currently estimated at \$270 billion in the next 10 years alone. The Task Force also laid out a multi-part national strategy for the LGBTQ movement—and communities coast to coast—to take advantage of this opportunity.

The Task Force is currently seeking funding to underwrite the national strategy. The executive summary of the Task Force's work can be found at: <https://www.horizonsfoundation.org/wp-content/uploads/2018/04/National-LGBTQ-Planned-Giving-Strategy-Executive-Summary.pdf>. The full report can be found at <https://www.horizonsfoundation.org/wp-content/uploads/2018/04/National-LGBTQ-Planned-Giving-Strategy-Full-Report.pdf>.



PHASE 2:  
TESTING PHASE 1  
RESEARCH &  
BUILDING  
CAPACITY  
IN A COHORT  
MODEL



The selection of Metropolitan Group (Beth Strahan, lead) and Campbell & Company (Sarah K. Anderson, lead) to serve as fundraising consultants was exceptionally beneficial to the Project.

## PHASE 2: TESTING PHASE 1 RESEARCH & BUILDING CAPACITY IN A COHORT MODEL

### Project Structure: Vision and Evolution

Phase 2 of the project sought to determine how to apply the Phase 1 research in a real-world context. Its ultimate goal was to develop a set of best practices that, in Phase 3, could be shared across the movement and grow the fundraising capacity of LGBT organizations at all levels of the movement.

Specifically, this phase was designed to (1) test messaging frames with specific segments of donors/prospects; and (2) determine what “fixes” to basic fundraising capacity issues appeared to be most effective in terms of increasing new donors and retaining current donors. The Project brought together the steering committee along with a number of LGBT executive directors, development directors, and development consultants to help plan Phase 2. This group decided that that the project would: select two fundraising consultants (or consultant teams), each to work with two “anchor” organizations—a mid-sized LGBT Community Center and a mid-sized statewide LGBT advocacy organization. The consultants would provide relatively extensive technical assistance and support to the anchor to improve its fundraising capacity (at roughly \$100,000 per year per anchor). The project also made \$50,000 available to each anchor to implement a project or capacity enhancement identified by the consultant as being most need. In addition, three or four similar organizations would form a “learning circle” around each of the anchors. All cohort members would also have access to collaborative learning opportunities through regular webinar/conference calls and in-person convenings, with training organized by the project consultants. In other words, as originally envisioned, these cohorts would serve as a proving ground for donor messaging and outreach strategies over the course of about a year.

The criteria for participation were that the organization must have had (1) one full-time fundraising staff person; (b) be relatively stable financially; and (3) been in existence for at least 10 years. The Steering Committee worked with CenterLink (the national umbrella organization for LGBT community centers) and the Equality Federation (the umbrella for statewide LGBT advocacy organizations) to identify the anchors and learning circle members. The Pride Center at Equality Park (Ft. Lauderdale) was the anchor for the community center cohort and the Equality Foundation of Georgia was the statewide advocacy group anchor.

We thought that by having groups with similar missions and similar budget sizes we could reduce the tendency of organizations to see their challenges as unique. That assumption proved to be flawed.

As the organizations were being selected, the Steering Committee issued an RFP to select the fundraising consultants. The Metropolitan Group (Beth Strahan, lead) was selected to work with the cohort of statewide LGBT advocacy groups and Campbell & Company (Sarah K. Anderson, lead) was retained for the LGBT community center cohort.

In hindsight, the selection of these two specific firms—and their assigned staff—was exceptionally beneficial to the Project. Many members of the steering committee and LGBT organizations had poor or mediocre and over-priced experience with fundraising consultants. Here, it was the opposite, with both firms digging deep and patiently to work with cohort groups and continually refine their approaches in real time. The Project's initial concerns that having two firms might result in fiction and unhelpful competition proved unfounded. Throughout the rest of the Project, the firms worked together to develop written materials and conduct joint trainings.

As the project unfolded, three major changes took place in the project structure based on input from cohort members, the steering committee, and the consultants:

- The cohorts discontinued regular use of “learning circle” webinars and conference calls, which proved a challenging format for deep engagement and peer connection, in favor of more intensive in-person convenings (three total during the this phase of the Project).
- The steering committee expanded availability of individualized fundraising consulting to all cohort members, rather than only the anchor organizations.

The project extended beyond the initial one-year timeline to nearly two years to allow for an evaluation of impact through end-of-year fundraising in 2016, ultimately concluding in the spring of 2017.

## Overview of Phase 2 Findings

The cohort phase of the LGBT Giving Project was originally structured to determine the most effective donor messages and outreach strategies to motivate new and increased giving from LGBT individuals. However, the steering committee and project consultants realized early

## Equality Federation Cohort

- *Equality Foundation of Georgia (anchor)*
- Equality New Mexico Foundation
- Equality North Carolina Foundation
- Equality Texas Foundation
- Equality Virginia

## CenterLink Cohort

- *Pride Center at Equality Park (anchor) (Ft. Lauderdale)*
- William Way LGBT Community Center (Philadelphia)
- GLTB Community Center of Colorado (now Center on Colfax—Denver)
- LGBT Community Center of Greater Cleveland
- LGBT Center Orange County (discontinued participation early in project)

## Factors contributing to contributed revenue growth:

- Sustained focus on development as an institutional priority
- Access to training and resources based on fundraising best practices
- Proactive, multi-channel appeals to donors and prospects
- Compelling, current messaging that focused on telling the stories of those impacted by their work

in the cohort phase that **the fundamental challenge of strained organizational capacity presented the greatest barrier to increasing contributions from LGBT donors.** In short, it became clear that finding the “perfect” message was less vital to organizations’ fundraising success than equipping those organizations with tools, resources, and knowledge to support a stronger culture of philanthropy.

In line with the challenges cited in *UnderDeveloped*, the cohort organizations faced many demands on their time and resources that made it difficult to execute on fundraising best practices, invest in capacity building and leadership development, nurture an organizational culture of philanthropy, and sustain lasting donor relationships in the face of turnover and competing priorities.

These organizations were each doing admirable work within their communities and were selected to participate in the project because they were relatively solid, well-performing examples of LGBT-focused statewide advocacy groups and community centers. In many ways, the fact that they, too, struggled with issues related to organizational capacity and culture of philanthropy highlights the ways in which organizations survive and succeed in spite of these seemingly intractable challenges.

Each of the organizations taking part in the project experienced capacity challenges that we know are not unique to the LGBT movement but that impact many nonprofit organizations across the sector. Although each organization experienced these challenges in different ways, several common themes emerged over the course of the work:

- **Turnover** among key fundraising staff, including executive directors and directors of development, the two main “point people” involved in the project
- Lack of investment—or, often, lack of the *ability* to invest—in **professional development** for fundraising and data management staff
- Challenges engaging the **board** in fundraising and building understanding of the importance of fundraising
- Inadequate **data management systems** and/or systems that were not being used their fullest potential to effectively segment, track, and analyze donor and prospect data
- Difficulty executing **donor segmentation** that took into account the nuances that the prior research revealed about messaging to subsets of the LGBT community

Despite the challenges that the cohort organizations encountered relative to their fundraising work, participation in the LGBT Giving Project led to **growth in contributed revenue for eight of the nine organizations, a combined increase of \$2.58 million over the baseline period across the organizations, a 33% increase in dollars raised.**

Factors in that growth included a **sustained focus on development as an institutional priority; access to training and resources based on fundraising best practices; proactive, multi-channel appeals to donors and prospects; and compelling, current messaging that focused on telling the stories of those impacted by their work.**

## A Deeper Look at Common Capacity Challenges

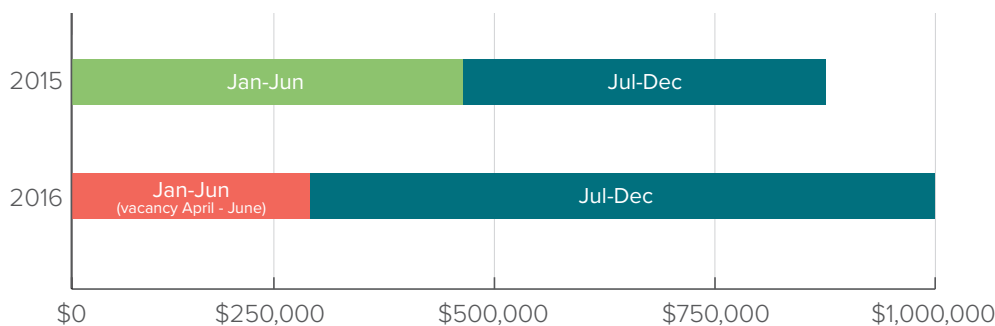
### Turnover

Throughout the course of the project, 7 of the 10 organizations originally engaged in the cohorts experienced turnover in the director of development and/or executive director role. Turnover in both roles led to one community center's withdrawal from the project. **Of 25 key individuals participating in the project, 10 turned over in just under two years**, three executive directors and seven directors of development.

During in-person convenings, development directors noted the challenge of leading fundraising efforts within relatively small organizations, where their responsibilities commonly ranged from shepherding a relationship with a significant donor or funder to updating information in the database. Many noted that the strategic and relational duties alongside the more administrative and technical responsibilities led to a feeling of “scrambling” and constantly shifting gears and contributed to burnout. Likewise, executive directors noted the difficulty of finding a staff leader who could readily fulfill both roles. **Those organizations that had at least one other staff member supporting development and/or where the executive director was more fully involved in fundraising, particularly managing major donor relationships, experienced fewer issues with turnover.**

- Although not always the case, many organizations experienced a decline or stagnation in fundraising revenue during periods of turnover. Loss of knowledge and skills due to turnover was significant, as was the disruption to donor relationships and execution on development plans. During vacancies, organizations had to divert resources to cover crucial responsibilities, while other development functions were put on hold; often executive directors absorbed the bulk of fundraising responsibilities while searching for a new development leader. When new staff came on board, resuming momentum sometimes took several months as the new team members were Fundraising challenges are rooted in a **lack of leadership and support for a culture of philanthropy.**

The chart below illustrates the impact of turnover on one cohort member's fundraising. When the director of development left in April of 2016, fundraising revenue for the first half of the year was nearly 40% lower than the prior year. The organization hired a new director of development in June, and the second half of the year represented significant growth over the prior year, including increased fundraising following the November election.



Fundraising Results Amid Development Transition:  
One Organization's Experience

Seven of the 10 organizations originally engaged in the cohorts experienced turnover in the director of development and/or executive director role. Of the 25 key individuals participating in the project, 10 turned over in just under two years.

Board engagement remains an area for improvement for most organizations, and participating organizations suggested that one improvement they would make to the LGBT Giving Project would have been to structure a more integral role for at least one representative from each organization's board.

### Board Engagement

Most organizations taking part in the project had limited engagement in fundraising from their boards. In an assessment of various elements of a culture of philanthropy, only one organization “strongly agreed” that its board was engaged and committed to fundraising. As part of the tailored technical assistance organizations received, several specifically focused their work on increasing the board’s buy-in and training around fundraising, especially two organizations that were in the midst of major fundraising campaigns.

Board engagement remains an area for improvement for most organizations, and participating organizations suggested that one improvement they would make to the LGBT Giving Project would have been to structure a more integral role for at least one representative from each organization’s board. Later elements of the project included specific training to equip senior staff to lead discussions with boards around fundraising engagement and to involve them more deeply in donor relationships, and board members from all cohort organizations were invited to participate in a webinar on the board’s role in development planning and fundraising activities. Still, a broader role for board chairs and/or development committee chairs during the individualized consulting and in-person convenings would likely have strengthened ties among the fundraising “triumvirate” of executive directors, development directors, and board leaders.

### Senior Staff Engagement and Professional Development

Executive directors engaged in the project noted that they often struggled to prioritize fundraising among their own responsibilities and to lift it up as an institutional priority as they dealt with the demands of meeting changing and growing community needs or advocating for policy change and combatting policy threats. Executive directors who had not had much prior experience with fundraising used the project as a way to demystify their roles, reduce the stigma associated with asking for money that some felt, strengthen their ties with the development director partners, and build their confidence as leaders in shaping a culture of philanthropy within their organizations.



#### PARTICIPANT PROFILE

### Phyllis Harris

Executive Director of The LGBT Community Center of Greater Cleveland, 2012 to Present:

“When I was asked to participate, I was overjoyed, The purpose of this was to increase overall giving for LGBT organizations, and I was, ‘Right on!’ Our Center’s roots go back more than 40 years, and we marked a new chapter in our history in 2017 with the groundbreaking for a new facility in the Gordon Square Arts District of the city. The Giving Project gave impetus and focus to our fundraising efforts to support the new building and programs.

The election of 2016—the timing of the Center’s involvement in the LGBT Giving Project was “horrifying and [yet] right on time. It became a great opportunity to get some best practices, and to learn about ourselves—and it gave me credibility. I could say to funders that we were working to be more efficient, and how we could have more impact.” It clarified that when marriage equality became the law of the land, the work didn’t stop. We shifted our focus to other issues, including trans inclusion and trans rights, and health disparities and employment. We and our board have tried to turn the challenges that there are being in Ohio and during this Administration into opportunities.”

Although not universally true, in this project **most of the executive directors who had held fundraising roles previously were more likely to have longstanding development directors in place and less volatile fundraising revenue.** They were also more likely to consider their development directors “strategic partners” and to characterize philanthropy as well-understood across their organizations.

The executive directors involved in the project noted that the time dedicated to in-person fundraising training and connection with their peers at similar organizations sparked or renewed their commitment to lifting up philanthropy and development as priorities within their institutions.

#### **Systems and Infrastructure**

Ineffective or poorly utilized database systems proved a point of frustration for nearly every organization taking part in the project. In some cases, these systems or lack of database training significantly constrained the effectiveness of fundraising activities, from challenges segmenting donors and non-donors in a mailing to difficulties appropriately tracking and coding appeal responses. In one case, one organization’s chaotic end-of-year mailing process in coordination with a mail house led to the mailing being delayed until the new calendar year.

Ineffective or poorly utilized database systems proved a point of frustration for nearly every organization taking part in the project.



## Connecting Capacity Challenges to Donors' Barriers to Giving

The Phase 1 donor research found very positive attitudes about LGBT organizations, with 91% of known donors and 81% of general population donors saying they held a very or somewhat favorable opinion about them. At the same time, the research uncovered a number of common reasons that donors cite for either not giving to an organization or discontinuing a gift. The most common reason noted was that an organization seemed **poorly run or ineffective**—an impression that relates directly to the sorts of capacity challenges that cohort organizations faced around turnover, data management, and the ability to craft and share a compelling, tailored case for support that illustrates the effectiveness and impact of an organization's work. It is important to note that, in a post-2016-election survey that the LGBT Giving Project fielded among LGBT-identified donors and non-donors, the majority of individuals surveyed expressed favorable opinions of LGBT nonprofits and indicated that they intended to maintain or increase their support in the wake of the election. However, of those who either did not support LGBT nonprofits or planned to decrease or discontinue their support, this impression of organizations being poorly run remained a common reason that individuals cited as a barrier for support.

Another reason for not giving that was cited in the post-election survey was that individuals **simply weren't asked to make a gift**. Indeed, we found that many cohort organizations had not been proactively asking their support bases—especially lapsed and non-donors—for contributions on a regular basis prior to participating in the LGBT Giving Project. Through multi-channel appeals that were tailored for existing, lapsed, and non-donors, many of the cohort organizations saw success in encouraging upgrades and reengaging past donors, with more limited success in bringing in new donors.

This resulted in challenges with being able to fully implement the message testing that the project steering committee originally envisioned, as much of the first phase research pointed to specific nuances of engaging donors vs. non-donors as well as messages that might resonate with particular subsets of the LGBT population, including people of color, women, transgender individuals, and donors of different generations. Quite simply, cohort members did not have the data or systems necessary to implement the sophisticated donor segmentation that the phase one research suggested would be meaningful.

## Phase 2 Outcomes

### Overall Project Results

As noted above, eight of the nine organizations participating in the LGBT Giving project realized gains in contributed revenue. Between June 2015 and December 2016, **the nine organizations raised \$2.58 million more than they had in the baseline period prior to the project, a 33% increase in dollars raised<sup>1</sup>**. The total changes in giving ranged from a decrease of 1% to an increase of 432%. The median change in contributed revenue was 17% and the average, after excluding the 432% outlier<sup>2</sup>, was 37%.

### Income Gains

Cumulatively, the organizations in both cohorts realized gains in contributions in each of the three full six-month increments of the project compared to baseline figures. The strongest gains, especially for the advocacy-focused organizations in the Equality Federation cohort, came in the final six months of 2016, which included post-election giving.

Eight of the nine organizations reported gains in contributed revenue during the course of the project, and six of the nine increased the total number of donors.

Organization	Change in Dollars Raised Over Baseline	Change in Donors Over Baseline
Pride Center at Equality Park	20%	12%
William Way LGBT Community Center <sup>3*</sup>	-1%	34%
GLBT Community Center of Colorado	2%	28%
LGBT Community Center of Greater Cleveland <sup>4**</sup>	85%	-14%
Equality Foundation of Georgia	17%	-9%
Equality New Mexico Foundation	432%	309%
Equality North Carolina Foundation	107%	0.1%
Equality Texas Foundation	57%	14%
Equality Virginia Foundation	9%	-4%

<sup>1</sup> The cohort phase continued into early 2017, but because data collection occurred in late April 2017 and did not include a full six-month period, 2017 fundraising figures are not included in this analysis. Data was collected in six-month increments to allow for analysis across organizations with different fiscal years. To ensure an apples-to-apples comparison to prior years, we use baseline figures based on the average of the two prior six-month periods. Giving was calculated in this way because organizations typically had higher fundraising totals in the last half of any given calendar year than the first half (as is true among most nonprofits), so comparing the 18 months of the project period to the immediate 18 months prior would have been skewed in favor of the project with two July-to-December periods.

Fundraising revenue also excludes a \$1.8 million gift to the LGBT Center of Greater Cleveland, committed in 2014 with revenue realized in 2015 and 2016.

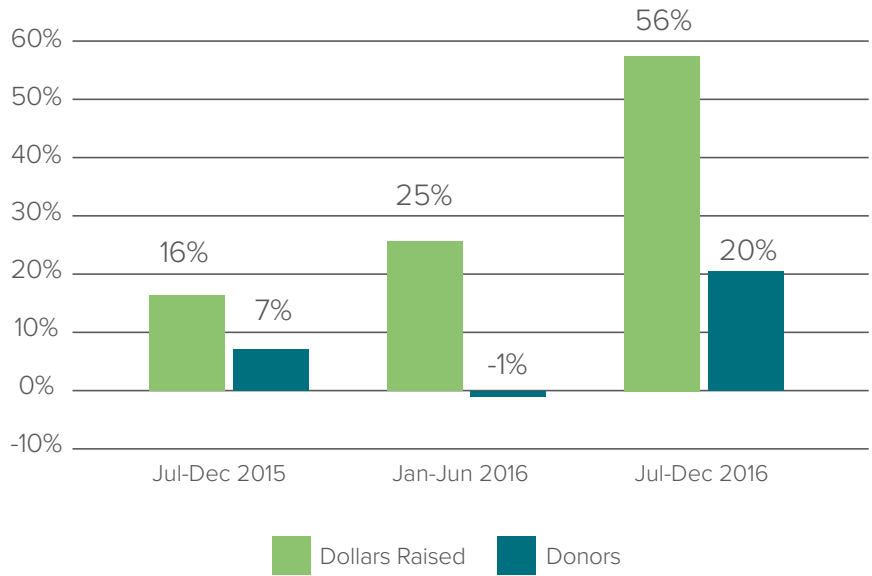
<sup>2</sup> The outlier represents an equality organization, Equality New Mexico, which was the smallest of the cohort organizations in terms of dollars raised when the project began. The group's fundraising revenue grew from a little under \$20,000 in the baseline period prior to the project to more than \$83,000 in the last six months of the project alone.

<sup>3</sup> Much of William Way's decline in dollars raised came early in the project during a period of turnover with an extended vacancy in the director of development role. In the final six months of the project, after filling the position, William Way saw a 31% increase in dollars raised over the baseline.

<sup>4</sup> Cleveland's fundraising revenue totals do not include a substantial gift of \$1.8 million pledged in 2014 with revenue counted throughout 2015 and 2016.

Participants in this phase of the LGBT Giving Project raised \$2.58 million more than they did during the baseline period, a 33% increase in dollars raised.

Average Increase over Baseline by Six Month Period



The strongest fundraising period for organizations, on average, was July 2016-December 2016, which captured nearly two months of post-election giving. However, on average, organizations increased their total dollars raised in each six-month period analyzed and increased the total number of donors in two of the three periods, as shown below:

### Donor Upgrading

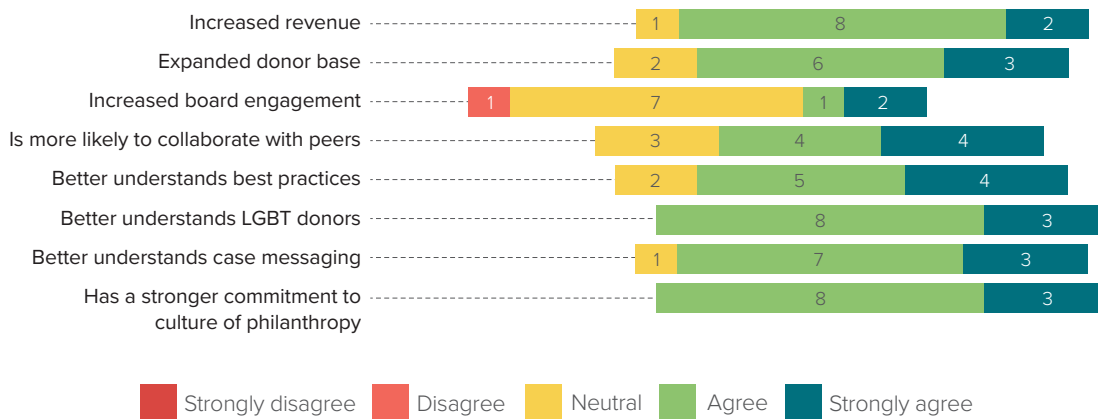
During the 18-month period evaluated, **six of the nine organizations increased the number of donors**, and gains in this area were more modest than contributed revenue gains. In total the number of donors increased by 1,074 among the CenterLink cohort (17% increased) and 696 among the Equality Federation cohort (5% increase). The total changes in donor numbers ranged from a decrease of 14% to an increase of 313%. The median change in contributed revenue was 12% and the average, after excluding the 313% outlier, was 7%.

Overall, organizations participating in the project reported that their involvement in and of itself provided them increased visibility and credibility, especially strengthening their relationships with institutional funders. Many organizations touted their participation in the project within their networks and noted that it demonstrated their commitment to industry best practices and improving the effectiveness and impact of their work.

## Other Gains from the Project

In terms of other functional and cultural improvements that resulted from the project, participants noted that their involvement benefited their organizations across a range of measures, as shown below:

As a result of this project, our organization...



Note: In some cases, more than one representative from an organization provided input on these questions, resulting in responses that total more than nine.

## Findings on Donor Giving Behaviors

The cohort phase of the LGBT Giving Project provided organizations with support to encourage existing donors to increase their support in addition to testing methods for acquiring new donors and reengaging lapsed donors. Organizations typically saw greater success with their efforts to increase giving from current donors, which came through explicit upgrade requests in appeals developed through the project as well as through an increased focus on deepening relationships with donors with major gift potential.

- For one organization, a specific upgrade request in the 2016 year-end appeal resulted in 49% of donors who responded to the appeal making an upgraded gift over the prior year, on average increasing their donations by 130%.
- Tracking the number and value of donors giving \$1,000 or more reflected a growing emphasis on major gifts for several of the cohort organizations. One relatively small advocacy organization grew from just 7 donors of \$1,000 or more in 2015 to 24 donors at this level in 2016, fueling much of its total revenue growth during the project. A community center that already had an impressive roster of donors at the \$1,000+ level grew from 301 donors to 327 while also increasing the average gift from donors at that level by \$124; taken together, those gains in a small increase in new donors and substantial upgrades at the top of organization’s donor pyramid comprised about half of the organization’s total revenue growth during the project.

Organizations typically saw greater success with their efforts to increase giving from current donors rather than acquisition of new donors.



Efforts to acquire new donors through the project illustrated the challenge that many nonprofit organizations face in converting broader networks and colder audiences into donors, a challenge that is further compounded for identity-focused causes seeking to engage non-donors where aspects of their identity (such as gender identity, sexual orientation, race, etc.) may not be readily apparent. Acquisition efforts were costly, and the efficacy of some efforts was difficult to track due to organizational infrastructure. **The most successful acquisition efforts were those that occurred during a time when organizations could draw on a moment of political urgency that heightened interest from non-donors and raised the profile of the organizations working on that issue to the level where new donors “self-selected” in by making a gift often unprompted.**

- Facebook ads tested for one statewide advocacy organization during a high-profile campaign to defeat a discriminatory “religious liberty” bill yielded 53 new donations and an average gift just over \$100.
- Similarly, another advocacy group saw its greatest gains in the number of donors as it worked on the frontlines to defeat a discriminatory “bathroom bill.”
- The post-election appeal for one community center yielded a nearly identical return among non-donors as the prior year, but the average gift increased by nearly 50%, bringing the cost to raise a dollar for that segment to a reasonable \$1.07.

Other acquisition efforts that weren’t as explicitly tied to a moment of political urgency were less successful. One advocacy organization tested appeals to a “warm” audience of mailing list subscribers who had not given as well as “cold” audience of non-donors identified through the Equality Federation’s Equal Treatment Model.<sup>1</sup> The two audiences had identical response rates of 0.70%, on target with best practices. However, the average gift from mailing list subscribers was \$113, three times the average gift from the VAN list. The VAN list appeal proved incredibly costly with a cost per dollar raised of \$6.01, compared to the subscriber list cost of \$1.92 (also higher than ideal).

The project also provided several opportunities to test the impact of matching gift challenges on leveraging donations. The results showed that **matching challenges can be highly effective for motivating gifts from existing supporters, but results for matching challenges with non-donors were less conclusive.** Several organizations structured matching challenges that they promoted on GiveOUT Day, predominantly through social media, and these organizations successfully maxed out their matches. One community center also leveraged a \$500,000 matching grant throughout 2016, highlighting this giving opportunity in its year-end appeal, on its website, and through social media; this center had the highest year-end response rate from current donors of any CenterLink members and had an average gift of \$224 in response to the appeal, compared to an average of \$166 among the cohort.

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<sup>1</sup> The Equality Federation Equal Treatment Model relies on the Voter Activation Network (VAN) data to target the right people for engagement on LGBT issues. This predictive tool scores every voter on how likely they are to support nondiscrimination protections—even after being exposed to oppositions’ fear-mongering messages—as well how likely they are to take action or need education to shore up support.

The broadest matching gift test among non-donors came through a boosted video ad in early 2017 that eight of the nine organizations ran on Facebook. The ad concluded with a call to action to donate, with a donor’s impact doubled through a matching gift challenge of up to \$1,000 (per organization). Of the eight organizations that ran the ad, two met/exceeded the full \$1,000 match, two partially met the match, and four raised roughly the same or less than they had in the prior period. These ads targeted audiences that were not already engaged with the organizations, focusing on those who identified as or were interested in the categories of gay, lesbian, bisexual, transgender individuals, or LGBT parents.

While the ability to target based on self-selected identity and/or interest area is more precise via social media ads than other acquisition efforts such as email and mail list purchases, the results provided mixed evidence on whether matching challenges in the social media environment are effective for motivating a non-donor to make a first-time gift.

### Findings on Donor Messaging

Although more of the cohort phase of the project turned to focus on capacity building and training for participating organizations, there were several opportunities to test the efficacy of various message frames that were highlighted in phase one. CenterLink organizations used year-end appeals and a donor survey to test an activist-oriented message (akin to the “equality” frame from Phase 1) against a community-focused one (similar to the “stronger together” frame from Phase 1). Equality Federation organizations tested an “equality” message against the “stronger together” frame using appeals, tested several additional messages frames through Facebook ads, and tested the activist and advocate archetypes from the first phase in its 2016 appeals.

Although a deeper examination of the data from the phase one survey by different types of respondents yielded nuances in how those donors responded to different messages frames, phase two revealed that the capacity challenges among organizations meant that segmenting donor appeals by more in-depth characteristics (such as by gender identity, race, or age) was not possible.

In 2015, the CenterLink organizations had stronger responses using an activist-focused appeal than a community appeal with non-donors and lapsed donors. (Existing donors were suppressed from the 2015 appeal.)

	Lapsed Donors		Non Donors	
	Activist	Community	Activist	Community
Response Rate (Total)	1.32%	0.42%	0.31%	0.35%
Response Rate (Mail)	1.34%	0.40%	0.41%	0.50%
Response Rate (Email)	0.85%	0.96%	0.00%	0.08%
Revenue (Total)	\$11,280	\$1,750	\$1,842	\$1,655
Revenue (Mail)	\$9,780	\$1,615	\$1,842	\$1,355
Revenue (Email)	\$1,500	\$135	\$0	\$300
Cost Per Dollar Raised	\$0.42	\$2.56	\$2.67	\$2.45
Average Gift	\$125	\$67	\$61	\$57

While the ability to target based on self-selected identity and/or interest area is more precise via social media ads, the results provide mixed evidence on whether matching gift challenges in the social media environment are effective for motivating a non-donor to make a first-time gift.

What proved more significant among the Equality Federation cohort members was to share an appeal with a strong sense of urgency and a personal story that illustrated the individual impact of the organization's work.

A donor survey of CenterLink donors in 2016 did not yield as clear a “winner” among the two tested messages. Respondents were asked to select which message appealed to them more from a series of several samples. Among regular donors, the community message slightly outperformed the activist message (53 percent to 47 percent), and among occasional donors, the reverse was true (53 percent preferred the activist message). Because occasional donors are most analogous to the lapsed donor audience from the year-end appeal, this finding supports the lapsed donor preference for the activist message, though the result was not as divergent as it was in the year-end appeal response.

These two findings suggest that those who already know their community centers well may appreciate the “heart of the community” idea that is core to many centers’ case for support, whereas those who don’t already support their center may be more motivated to do so if centers adopt a somewhat more aggressive tone and focus on the role centers play in moving the LGBT community toward greater equality.

Similarly, an appeal for one member of the Equality Federation cohort in early 2016 showed that non-donors preferred an equality-focused messages whereas current donors were more likely to respond and made higher gifts if they received the “stronger together” message. Results were less conclusive with other members of the Equality Federation cohort, with some having insufficient sample sizes to conduct split testing or to draw meaningful conclusions. **What proved more significant among the Equality Federation cohort members was to share an appeal with a strong sense of urgency and a personal story that illustrated the individual impact of the organization’s work.**

These findings changed significantly with the year-end appeals sent in 2016, distributed just after the election. Among both cohorts, response rates and average gifts were nearly identical regardless of message, suggesting that **the timing of the appeals closely on the heels of the election was more motivating to respondents than the message they received.** Indeed, both cohorts saw major gains in response rates and gifts compared to the appeals sent in 2015.

Following the conclusion of the cohort phase, the LGBT Giving Project further tested donor attitudes and responses to message with a focus on understanding changes in the post-election environment. Through focus groups and a comparative donor and general LGBT population survey, the project found that the message that best resonated with donors and potential donors was one that:

- Conveyed urgency and clear call to action
- Focused on the importance of an intersectional movement
- Noted the need to make change on a local level as well as a national one
- Acknowledged that the challenges we face today are a reflection of long-standing prejudice

More details on the phase three research is provided in the section that follows on Phase 3.

## Resource Library Inventory

The Project resource library includes more than 50 unique resources, including templates, samples, background research, and training presentations. Highlights include:

- Culture of Philanthropy
  - Training on board roles and engagement in fundraising and board member annual action plan template
  - Development retention risk assessment tool
- Development Planning
  - Scorecard template for development goals and performance measures beyond dollars raised
  - Special event evaluation tool
- Donor relationship building
  - First 100 days engagement plan for new donor
  - Relationship management handbook
  - Donor and prospect strategy development guide
  - Solicitation training materials
  - Planned giving overview
- Communications and case for support
  - Sample appeal letters
  - Case development worksheet
  - A/B testing tracking tool
- Messaging takeaways from Phase 1 to guide donor-focused communication

## Best Practices and Replicability Across the Movement

Although the LGBT Giving Project sought out to understand the unique factors that might motivate LGBT individuals to give to the movement, one of the most powerful, if not surprising, takeaways was how similar the organizations that comprise the movement are to the vast array of nonprofit organizations within the sector. The capacity issues and demands on staff members' time and attention that emerged in the project are seemingly universal, especially for small and mid-sized organizations, and it remains an ongoing challenge to meaningfully engage with, deeply understand, and consistently apply best practices to their development operations.

During the course of this phase, the funders and consultants found that what proved to be most effective was a combination of **in-person collaborative learning opportunities** with a focus on best practices in development; access to a **collection of plug-and-play resources**, tools, and templates; and **individualized, hands-on technical assistance** to help organizations apply these learnings and resources to their specific situations. In particular, an investment in a relatively modest amount of individualized consulting had substantial return for organizations.

The **cohort learning approach** provided opportunities not only for organizations to learn together but also to create meaning together from what they were learning in the context of their own experiences, to troubleshoot ideas with one another, to see a path forward around a particular problem based on what a peer had achieved, and to simply know that they were not alone in facing a common challenge.

Cohort members reported that they were more likely after the project to collaborate with their peer organizations or to reach out to a fellow cohort member with a question or idea. While the two-day gatherings were an expensive element of the project, cohort members noted that the dedicated time in person was crucial because it forced them to step outside of their day-to-day work and focus on development strategy and training for a sustained period. In the second cohort convening, attendees participated in peer-to-peer learning sessions with people with similar jobs (e.g., executive directors, development directors, etc.). This change, which allowed for more candid sharing of shared challenges, received extremely positive reviews.

Following the cohort phase, the steering committee and consultants used the model of dedicated in-person group learning to bring the results of the project to additional organizations within the LGBT movement, leading several intensive workshops, including two full-day sessions, in conjunction with existing conferences in the movement (Creating Change, CenterLink Leadership Summit, and In Our Own Voices).

The **resource library** created through the project included a wide range of templates and samples that organizations could access, tailor, and put to use within their organizations. These tools were based on best practices and crafted in conjunction with the organizations to ensure they met their needs and would be useful both to the cohort and other organizations



within the movement. Beyond the cohort phase, the conference-based workshops mentioned above were designed around equipping participants with these tools and resources, and the resources have also been shared more broadly through webinars with CenterLink and Equality Federation as well as an email/blog post series hosted by Horizons Foundation.

Finally, the in-person learning and availability of tools and resources were most effective when combined with **hands-on, individualized technical assistance** that involved consultants working closely with organizations to consider how best practices applied to their unique situations, to troubleshoot issues as they arose, to help them work toward specific goals, and to provide accountability for follow up. Given the individualized nature of this work, this element of the project is the most difficult and costly to replicate beyond the cohorts involved in phase two.

## Key Recommendations

Based on the findings from the LGBT Giving Project's second phase, and building upon the project's earlier research, Campbell & Company and Metropolitan Group developed a set of recommendations for the field of LGBT organizations, particularly community centers and statewide advocacy groups.

Each of the recommendations provides a brief rationale and includes a table of steps for how organizations at different levels can work toward implementing the recommendation. These may be found at Appendix 3. The recommendations are also largely reflected in the Silver Lining email series distributed via Horizons Foundation in the summer and early fall of 2017. This series is available at <https://www.horizonsfoundation.org/wp-content/uploads/2014/09/Silver-Linings-Toolkit.pdf>.



## Beyond Capacity: Confronting Issues of Diversity, Equity, and Inclusion

One element of the work with the cohorts that continually emerged was the challenge of diversity, equity, and inclusion within their organizations and donor bases and in the movement more broadly. This included the makeup of the cohort representatives themselves: two people of color among the 25 folks who were involved, and none to our knowledge who identified as transgender or gender diverse. Organizations noted—and the donor survey confirmed—that their donor bases were relatively homogenous—largely white, male, cisgender, older, and relatively affluent. Those organizations that had women and/or people of color in key leadership roles had more diverse donor bases from racial or gender perspectives. Specifically, the two centers with women as executive directors (Cleveland and Colorado) had significantly larger proportions of female-identified donors, as shown below.

Gender Identity of CenterLink Donor Survey Respondents			
	Male	Female	A Different Preferred Term
The Pride Center at Equality Park	80%	19%	1%
The LGBT Community Center of Greater Cleveland	56%	41%	3%
The GLBT Community Center of Colorado	46%	52%	2%
William Way LGBT Community Center	62%	34%	4%
<i>National Survey Results (Phase One, 2014)</i>	63%	34%	3%

All of the organizations acknowledged staff and donor diversity as a challenge, and this became an important focus area in the in-person convenings for discussion. By the end of the project, many of the cohort members were in different places in terms of their thinking about what that meant for their work and required of their leaders.

It is also important to note that the LGBT movement more broadly includes a wide array of small and mid-sized organizations led by and/or focused on serving people of color, transgender, and gender-diverse individuals and communities. These organizations have historically been under-resourced and in many cases have more strained capacity than the organizations engaged through the cohort, including many who operate without any paid staff, let alone paid development staff. These organizations may not see themselves reflected in the resources, tools, and trainings coming out of this work and may not be in the same position to meaningfully adopt and implement these best practices. This speaks to a size, structure and capacity disparity between those organizations that were part of the project and the broader movement, a disparity that is inextricably linked to questions of equity within the movement.

Engaging “end-users” (organizations) in research design is important to ensure the resulting research speaks to their needs and is usable based on their capacity.

## Reflections on Phase 2 Design

In evaluating the LGBT Giving Project, the steering committee and consultants developed several recommendations for how they might have approached the project differently based on what they learned:

- Engaging “end-users” (organizations) in research design is important to ensure the resulting research speaks to their needs and is usable based on their capacity. This step might have shifted the first phase of the project to a deeper exploration of organizational capacity issues rather than donor motivations and messaging. Additionally, engaging researchers for phase one with expertise in fundraising and donor engagement may have been beneficial.
- The cohorts mostly functioned by mission (community centers and statewide advocacy groups), and it wasn't until later in the project that cohort members began to work across mission and more by function (ED and DOD). These opportunities proved valuable for deeper discussion of the issues relative to each title.
- Using a competitive application process with clear responsibilities and deliverables for the cohort phase, rather than recommendations from CenterLink and Equality Federation, would have ensured buy-in. Asking boards to review and commit to the project also would have built greater understanding of the goals across the organizations' leadership.
- The project shifted to a more equitable allocation of consulting resources across all cohort members partway through and should have been designed with this approach from the outset.
- Engaging board members in the process, including a representative during in-person convenings as well as through more intentional updates and discussions with full boards, would have been an effective way to build greater organizational commitment to the work and help develop a stronger culture of philanthropy in the process.
- It could have been effective to position the cohort members as “owning” more of what they were learning by asking them to present to the steering committee and/or to present to one another on what they were learning and improving through their technical assistance.
- Beyond dollars raised and number of donors, a more rigorous and regular assessment of cohort member progress would have proven valuable, including, potentially, evaluation against a control group.
- The steering committee met monthly by phone for much of the project and would likely have benefitted from meeting more frequently at times and meeting in person at the beginning of the work and at key points throughout. Involvement from CenterLink and Equality Federation on the committee also would have been beneficial.



## PHASE 3: “SILVER LININGS” MESSAGING RESEARCH

### PHASE 3: “SILVER LININGS” MESSAGING RESEARCH

The results of the 2016 presidential elections triggered significant increases in donations to left-of-center groups. The ACLU, for example, more than quadrupled its number of members in the 15 months after the election. To better understand if there might be similar levers increase LGBT-related giving, the project retained Campbell & Company and Metropolitan Group to conduct a two-fold survey that included two distinct distribution channels—a nationally representative sample of LGBT individuals from research firm GfK’s Knowledge Networks panel (“national survey”), and a channel focused on LGBT individuals with connections to LGBT organizations, distributed through seven partners (“organizational survey”). The surveys were distributed in the summer of 2017. The national survey had 856 respondents, and the organizational survey had 546 respondents. The surveys explored respondents’ activities, emotions, priorities, and motivations since the election; their giving to charitable causes and LGBT organizations specifically; and their reactions to eight sample messages an LGBT organization might use to motivate contributions.

The firms narrowed and refined the tested messages based on the survey results. These updated messages served as the main topic for a series of eight focus groups—two each in San Francisco; New York; Columbus, OH; and Jacksonville, FL. Held in late August 2017, these focus groups invited participants to share more about what they did and did not like about the tested messages, in addition to broader discussion on their cares, concerns, and priorities, particularly since the presidential election.



#### SILVER LININGS FUNDRAISING

##### REPORT ON LGBT GIVING NATIONAL RESEARCH

UPDATED JANUARY 2018

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Through the research, a single message clearly emerged as the most compelling, a message frame called “Truly Safe,” which is reflected below with slight modifications based on input from the focus groups:

***The prejudice, hatred, and violence toward LGBTQ people that the election of Donald Trump unmasked are stark reminders that our community is still under threat. That’s especially true for transgender people, LGBTQ people of color, and LGBTQ immigrants. The fear and ignorance behind these threats are deeply embedded in this country and won’t go away on their own. We must fight for change, locally and nationally, because none of us will be truly safe until we all are.***

Elements of this message that most resonated with LGBT individuals included:

- The statement’s urgency and clear call to action
- Its focus on the importance of an intersectional movement
- The attention on the need to make change on a local level as well as a national one
- The acknowledgement that the challenges we face today are a reflection of long-standing prejudice

Beyond the tested messages, the survey and focus groups also provided insight into LGBT individuals’ attitudes and priorities since the election, including the following key findings:

- Common cares among LGBT individuals include their health and wellbeing, family, community, education, financial security, safety, and rights.
- Top concerns in the current landscape include LGBT rights, healthcare, and the environment.
- Since the election, individuals who had an existing connection with an LGBT organization have been highly active, with nearly 9 in 10 reporting some form of civic, political, and/or philanthropic engagement, the most common being having contacted an elected official or having donated to a nonprofit organization they had not previously supported. The national sample of LGBT individuals reported significantly less engagement, with just under half having undertaken any of the menu of activities.
- Those who had been more engaged in some way shared that anger and determination have been the primary emotions driving their increased involvement.
- Survey respondents shared that they largely feel less optimistic than they did a year ago that the challenges facing the LGBT community will be resolved in the next few decades, and focus group participants expressed their own discouragement in the wake of the election as well.
- Individuals who were connected to LGBT organizations tended to be more philanthropic overall and more likely to support LGBT causes than the general LGBT population, as would be expected. Among those who had donated to LGBT causes in the past year,



organizational survey respondents had given a median of 50% of their contributions specifically to LGBT organizations, and national survey respondents had given a median of 25%.

- Most donors to LGBT causes had maintained steady giving since the election, but 36% of organizational respondents and 23% of national respondents had increased their giving to LGBT organizations.
- Similarly, most donors said they planned to hold their giving steady in the next two years, but 41% of organizational respondents and 34% of national respondents reported that they plan to increase their giving to LGBT organizations. Among those who had never given to an LGBT organization, 35% said they would consider giving over the next two years.
- Donors who planned to increase or maintain their support for LGBT causes in the future most often cited the following motivations: legislative attacks on LGBT rights, the uncertain political climate, improved financial position and ability to donate, and increased hate crimes against LGBT people.
- Nearly half of the respondents who said that they had never given to an LGBT organization but would consider doing so noted that the main reason they had not given before was a lack of connection or awareness to any LGBT organizations or never having been asked to give.

The results of this research were included in a 44-page report disseminated to all groups who participated in Phase 1 research and summarized in a webinar conducted by the consultants.

The prejudice, hatred, and violence toward LGBTQ people that the election of Donald Trump unmasked are stark reminders that our community is still under threat. That's especially true for transgender people, LGBTQ people of color, and LGBTQ immigrants.

PHASE 4:  
TAKING IT ON  
THE ROAD



## PHASE 4: TAKING IT ON THE ROAD

This phase was focused on fulfilling the Project’s goal of sharing its findings as broadly as possible within the LGBT movement. This was accomplished through a wide range of presentation for executive and development directors, board members, and other staff from LGBT-focused organizations and funders, led the Project consultants, Sarah Anderson of Campbell & Company and Beth Strachan of Metropolitan Group.

They included day-long sessions, a keynote presentation, and four breakout conference sessions. In nearly every case, the sessions were structured around content “modules”—such as crafting a case for support or enhancing donor retention—drawing on the findings of the Project and the tools developed in collaboration with the Phase 2 cohort organizations. The format typically included a mixture of relevant project findings and best practice training, with an emphasis on engaging organizations in small groups in a workshop format where they could learn from one another as they worked through a tool or template that they could then immediately bring back to their organizations, such as a development goal-setting scorecard or a 100 days donor retention plan.

Presentations included:

- Equality Federation Leadership Summit (July 27, 2017 in Alexandria, VA)
- CenterLink Leadership Summit (September 16, 2017 in Scottsdale, AZ)—keynote
- Creating Change (January 26, 2018 in Dallas, TX)—breakout
- CenterLink Leadership Summit (September 17, 2018 in Rochester, NY)—day-long institute
- In Our Own Voices—Unity Through Diversity Conference (October 06, 2018 in Albany, NY)—keynote followed by breakout

- Creating Change—Development Institute (January 24, 2019 in Detroit, MI)—day-long institute
- Funding Forward (March 21-22, 2019 in Tucson, AZ)—breakout
- CenterLink Leadership Summit (September 21, 2019 in Los Angeles, CA)—two breakouts on case development and culture of philanthropy.

Based on feedback received through direct evaluations, participants found the content very helpful, rating the presentations around a 4.5 on a scale of 1-5 (where 5 is “very helpful”) and sharing positive feedback such as “This is the kind of nuts and bolts stuff that I came to the [CenterLink] Summit to get.”

Through 2019, over 350 individuals working on LGBT fundraising participated in these sessions.

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# Appendices

APPENDIX 1: LGBT GIVING PROJECT TIMELINE

APPENDIX 2: ORGANIZATIONS SUBMITTING DONOR  
DATA FOR PHASE 1 RESEARCH

APPENDIX 3: HIGHLIGHTS FROM “DEEP DATA DIVES”  
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APPENDIX 4: KEY RECOMMENDATIONS FOR LGBT  
COMMUNITY CENTERS AND STATEWIDE  
ADVOCACY GROUPS  
—THE METROPOLITAN GROUP AND CAMPBELL & COMPANY

# LGBT Giving Project

## Significant LGBT Developments

2011	Meeting of LGBT leaders, fundraising experts, and foundation leaders meet to whether the Project is needed	Barack Obama is president Congress repeals the “Don’t Ask/Don’t Tell” law
2012	LGBT executive directors endorse moving forward with the project Phase 1 qualitative research launched	Voters in four states endorse marriage equality
2013	Phase 1 quantitative research launched Nearly 7,000 LGBT donors complete lengthy survey of attitudes	US Supreme Court strikes down the “Defense of Marriage Act” ( <i>Windsor</i> )
2014	Research team completes survey of “general population” LGBT individuals	Anti-LGBT forces launch nationwide effort to undermine marriage equality through “religious liberty” claims
2015	Phase 2 begins with two cohorts of LGBT groups working with fundraising consultants	US Supreme Court extends the freedom to marry nationwide ( <i>Obergefell</i> )
2016	Fundraising consultants continue work with the two cohorts Movement Advancement Project (MAP) begins producing detailed analyses of six specific LGBT donor communities MAP completes report on the development capacities of 35 organizations	Anti-LGBT forces introduce a record 144 anti-LGBT bills in state legislatures Donald Trump is elected president
2017	Phase 2 work with the two cohorts wraps up and final reports with findings and recommendations completed MAP completes “deep data dive” reports Phase 3 “Silver Linings” research begins with baseline surveys and focus groups. Report on findings and recommendations issued Phase 4 “Taking it on the Road” begins with two presentations	President Trump issues order banning transgender people from serving in the military Trump administration begins reversing pro-LGBT policies secured under the Obama Administration
2018	Phase 4 “Taking it on the Road” continues	Trump administration continues to reverse pro-LGBT policies secured under the Obama Administration US Supreme Court waffles on whether private businesses may refuse service to gay couples
2019-2020	Phase 4 “Taking it on the Road” continues Final Giving Project report issued	US Supreme Court will decide if existing federal laws protect gay and trans people from employment discrimination

### APPENDIX 1:

# LGBT Giving Project Timeline

## APPENDIX 2:

# Organizations Submitting Donor Data for Phase 1 Research

- ACLU LGBT Rights Project
- API Equality-LA
- Asian & Pacific Islander Wellness Center
- Basic Rights Education Fund
- Bolder Giving
- COLAGE
- DignityUSA
- Empire State Pride Agenda
- Equality California
- Equality North Carolina
- Equality Ohio
- Equality Pennsylvania
- Equality Utah
- Equality Virginia
- Fair Wisconsin
- Family Equality Council
- Freedom to Marry
- Gay & Lesbian Elder Housing
- Gay & Lesbian Victory Fund
- Gay City Health Project
- Gay-Straight Alliance Network
- Georgia Equality
- GLAAD
- GLAD
- Horizons Foundation
- Immigration Equality
- Indiana Youth Group
- Keshet
- Los Angeles Gay & Lesbian Center
- Lambda Legal
- Lyon-Martin Health Services
- LYRIC
- MassEquality
- More Light Presbyterians
- National Black Justice Coalition
- National Center for Lesbian Rights
- National Center for Transgender Equality
- National Gay and Lesbian Task Force
- New York City Anti-Violence Project
- New York LGBT Community Center One Colorado
- Our Family Coalition
- PFLAG
- PFund
- Pride Foundation
- PROMO
- Q Center
- SAGE
- SF LGBT Community Center
- SoulForce
- The Center Orange County
- Transgender Law Center
- Trevor Project
- Utah Pride Center
- William Way LGBT Community Center
- Williams Institute

**Women (N = 2,277)**

- ***Opinion of LGBT organizations:*** LGBT women were more likely than LGBT men to have a “very favorable” opinion of LGBT organizations; however, they were far more likely to think LGBT organizations are too male-dominated. They were also more likely to state that they stopped donating to an LGBT organization because the organization failed to prioritize lesbian issues. This suggests that an organization’s ability to highlight LGBT women in leadership positions in the organization (among both staff and board) and/or demonstrate a commitment to programs that impact LGBT women may increase a female-identified donor’s likelihood of giving.
- ***Reaching women donors:*** The most untapped method for reaching women donors is reaching out to them at a center where services are provided. A third of women (35%) had not been solicited this way but would donate if they were. Contrary to the perception of some that women are not event attendees, two-thirds (65%) had made event donations, comparable to email solicitations (67%) and in response to a personal ask (67%)
- ***Issue priorities:*** The highest issue priorities among all LGBT women were the following: “Challenging and changing laws to improve the lives of LGBT people”; “Ending workplace or employment discrimination”; and “Working for equal rights in general.” Employment issues were ranked particularly high among single women, whereas relationship recognition and family issues were highest among married women.
- ***Planned giving:*** Similar to the overall survey sample, LGBT women were motivated to make LGBT-related planned gifts for two main reasons: 1) to help future LGBT generations; and 2) to continue their commitment to the LGBT community. Both of these motivations speak more to LGBT women’s deep connection to LGBT people and causes rather than a sense of personal legacy (which was rated lower by women and the survey sample as a whole).

Organizations may want to consider framing their planned giving programs as “sustainable giving.” This framing aligns with the commitment among LGBT women to sustaining the work of LGBT organizations and to staying involved in the community for the long term.

**High Household Wealth (N = 2,014)**

“High household wealth” was regarded as wealth of \$750,000 or more.

Among the findings:

- ***National causes:*** High household wealth donors (HHWD) were more likely to give to organizations with a national focus and with political goals. This may be due to the reality that larger national organizations have the capacity to do more and “higher touch” outreach.

- ***Stopping giving:*** The main reasons cited by HHWD for decreasing or ending donations were (a) an impression that the organization was run inefficiently or seemed ineffective; and (b) receiving too many asks for donations. It's possible that HHWD may have higher expectations for efficiency and personalized asks because they are frequently solicited by larger, perhaps non-LGBT organizations with dedicated major gifts departments that engage very smoothly with them. Over-solicitation of WWHD may contribute to the impression of an organization being run inefficiently.

Organizations are encouraged to increase personalization and, once a donation is secured, ensure that another ask does not too quickly follow and have other non-ask “touches” with these donors (such as an invitation to a non-ticketed event). They should also demonstrate how funds are used along with tangible outcomes.

- ***Methods of making asks:*** Most traditional methods used to obtain a donation—mail, events, email, and personal asks—were more successful with HHWD than other donors. For example, 79% had contributed by mail (vs. 60% for other donors); 78% via fundraising events (vs. 62% for other donors), 76% via email (vs. 68% for other donors), and 74% through personal asks (vs. 66% for other donors). (The exceptions were street solicitations and phone calls.) The survey also suggests a substantial opportunity for increasing donations from HHWD through personal one-on-one solicitations. Nine in 10 respondents indicated a willingness to donate if contacted by someone they know.

### Rural Donors (N = 684)

- ***Liberal leanings:*** Just as many LGBT people in rural areas identified as “liberal” or “very liberal” as urban donors (84% vs. 84%). This suggests that organizations do not need to “tone down” their appeals that focus on progressive values and use liberal messages to reach rural donors.
- ***HHNW households:*** The proportion of rural households reporting household wealth over \$1 million (21%) was similar to their urban peers (23%). Given their comparable levels of household wealth, rural LGBT people should not be overlooked by LGBT organizations as a source of donations. They may also be a worthwhile population to solicit for planned giving to LGBT organizations, including real estate.
- ***Marriage/partnerships:*** Rural donors are more likely to be married or in a domestic partnership (48% vs. 42% urban) and have children (29% vs. 21% urban). This indicates appeals based on protecting marriage equality and family safeguards may be successful.
- ***Less “activist”:*** Rural donors are less responsive to “The Activist” archetype<sup>1</sup> (39% vs. 44% urban). This suggests appeals to rural donors should use other identity frames.
- ***Personal asks:*** Rural donors have a greater preference for one-on-one methods of solicitation, but *not* phone calls or street solicitations.
- ***Privacy:*** Rural donors are less out than their counterparts, which suggests that mailings to them should not inadvertently out them by having “gay” or “LGBT” printed on the outside envelope.

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<sup>1</sup> “The Activist: We will only create change in America if we fight back against intolerance and hate.”

## LGBT People of Color (N = 783)

This report was based on the responses of 783 individuals who self-identified as LGBT people of color, comprising about 12% of total respondents. Of these, 154 identified as African American/Black (20%), 202 identified as Hispanic/Latinx (26%), 108 identified as Asian/Pacific Islander (14%), and 225 identified as mixed race (29%). *Given that other data show that people of color make up at least one-third of the total LGBT population (vs. 12% of the survey respondents), the report's finding could not be interpreted as representative of all LGBT communities of color.* The low representation of people of color may be due to the overall lack of engagement of LGBT people of color as donors to the participating organizations.<sup>1</sup>

Similarly, the relatively low numbers of respondents from different sub-groups (African Americans, Latinx communities, Asian/Pacific Islanders, and mixed-race people) made it impossible to draw statistically meaningful comparisons across these groups and required that the majority of the analysis be based on LGBT people of color as one group.

- ***Portion of giving LGBT causes:*** LGBT people of color were slightly more likely to devote a majority of their charitable giving to LGBT causes (53% for POC relative to 48% for non-POC). This finding strongly indicates that, contrary to what some may assume, LGBT organizations should be affirmatively reaching out to LGBT donors of color—and potential donors of color—because they generally place high priority on giving to LGBT causes.
- ***View of LGBT nonprofits:*** LGBT people of color were somewhat less likely than white LGBT people to have a “very favorable” opinion of LGBT organizations. Overall, 87% of LGBT people of color viewed organizations “very” or “somewhat” favorably, relative to 91% of non-POC respondents. Among the chief concerns were that LGBT organizations are often male-dominated and too focused on winning same-sex marriage. This is consistent with the survey finding that LGBT people of color were more likely to prioritize diversity (gender, racial, socioeconomic status) in staff, leadership, and board service and less likely to identify winning same-sex marriage rights as an issue priority.

These findings suggest that organizations seeking to increase giving among LGBT people of color may consider prioritizing inclusion and diversity in staff and board positions and/or demonstrate a commitment to programs that impact diverse populations. Organizations might also want to highlight programs and policy initiatives that are intersectional in purpose and execution i.e., programs that elevate the needs of people of color, women, transgender people, low-income people, and people with disabilities and are led by people in these communities. Finally, organizations should consider how a lack of diversity among volunteer leadership, in the development department, and among senior staff may discourage LGBT people of color from donating to the organization. This is especially important given that LGBT people of color said they were more likely to donate when approached with a personal ask.

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<sup>1</sup> Of the 56 organizations that participated in the survey, less than five had a specific organizational focus on a community of color. In addition, according to a 2015 Blackbaud report, Black and Latinx individuals are underrepresented as donors to nonprofits in general, likely because many organizations utilize fundraising models that predominantly cater to and look for white donors (as opposed to Black and Latinx donors being less generous than white donors).

- **Issue priorities:** LGBT people of color were much more likely to list social service provision as an issue priority. In fact, LGBT people of color were more likely to support organizations to the extent that they prioritize community services, including services for LGBT youth and LGBT older adults specifically.

Organizations may want to highlight the direct social services they provide in outreach to LGBT people of color, if possible. Organizations that do not provide social services may want to highlight ways in which their work has impacted the availability and provision of those services (through litigation, funding, partnership, or other avenues).

- **Transgender concerns:** LGBT people of color were more likely to support increasing services to transgender people. They also were more likely to support organizations that increase their focus on transgender issues. Conversely, they were more likely to report stopping gifts for failure to prioritize transgender issues (29%).

This finding suggests that an organization's ability to highlight transgender people in leadership positions (both staff and board) and/or show a commitment to programs and advocacy that impact transgender people may increase the likelihood of giving from LGBT people of color.

- **Racial identity:** LGBT people of color were more likely to state that their racial identity is an "equally or more defining aspect" of their identity than their LGBT identity (53% vs. 11% for non-POC).

This finding suggests that organizations that are able to demonstrate a commitment to racial justice could increase donor engagement among LGBT people of color. Whenever possible, organizations also should consider emphasizing services that address racial disparities, as well as advocacy for intersectional policy initiatives.

LGBT people of color still are a minority of LGBT people generally, so events and gatherings that are not intentionally or specifically focused on race and ethnicity may be seen as "white" events and may not appropriately reflect the experiences and priorities of LGBT people of color.

- **Religion:** LGBT people of color were more likely to be members of a number of specified religious groups.

Organizations should explore ways to expand donor outreach to include churches and religiously affiliated groups, particularly those that primarily serve people of color. Organizations also may want to consider ways to highlight interfaith programs and services at their organizations.

## Transgender People (N = 412)

The relatively small sample size of transgender people (412 respondents, representing 5% of the total), presented limitations on the confidence that could be placed in the findings. Therefore, this report was meant to be a starting point in exploring ways to hopefully increase organizations' outreach to and engagement of transgender people.

- ***Population differences:*** Transgender respondents were younger, had lower incomes, and had lower levels of household wealth than cisgender respondents; they also tended to give smaller amounts to LGBT organizations. Transgender respondents were more likely to give when presented with message frames that speak to community involvement and sustainability.

These findings suggest that organizations seeking to increase giving among transgender people could explore the development of campaigns that highlight the importance of small, monthly donations. In outreach efforts, organizations could frame small monthly donations as a critical way to be involved and to guarantee the long-term success of critical programs.

- ***View of LGBT groups:*** Transgender respondents were more likely to have a “Very Favorable” opinion of LGBT organizations; however, they also were far more likely to think LGBT organizations are too male-dominated. Compared to cisgender respondents, transgender respondents also were far more likely to endorse efforts by LGBT organizations to prioritize diversity among staff and leadership and to focus on issues that affect transgender people.
- ***Stopping giving:*** It was notable that transgender people stopped giving for starkly different reasons than those cited by other population subgroups. Almost all other groups stated that their top reasons for stopping giving were related to issues such as over-solicitation and a perception that an organization was ineffective. Transgender people, on the other hand, placed far more emphasis on the degree to which an organization focuses on transgender issues and diversity when making decisions about whether to continue their support.

The above two findings suggest that organizations reaching out to transgender donors should prioritize diversity in board and staff positions and/or demonstrate a commitment to programs that impact transgender people, people of color, women, and youth. Organizations also should consider using local transgender people as spokespeople for their campaigns.

- ***Children:*** Transgender respondents were more likely than cisgender respondents to have children (36% vs 22%). This is consistent with findings from the 2015 U.S. Transgender Survey Report, which showed that 38% of transgender respondents were parents, with 18% reporting that they currently have at least one dependent child. Also, transgender respondents were more likely to respond to message frames emphasizing the need to help protect future generations.



These findings suggest that transgender people may be motivated to donate to organizations that have programming for families and that specifically include transgender families in their programming.

- ***Portion of giving to LGBT:*** Although transgender people gave smaller total amounts to LGBT organizations compared to cisgender people, *they were more likely to devote a majority of their overall charitable giving to LGBT causes.* Forty-four percent of transgender people gave a majority of their charitable giving to LGBT causes, whereas only 33% of cisgender LGB people gave a majority to LGBT causes.

This suggests that transgender people prioritize support for LGBT organizations over other charitable causes. To the extent that organizations develop message frames and programming that reflect the concerns and priorities of this subpopulation, transgender people can be a reliable and sustainable source of donations. One route to further develop and strengthen giving relationships with transgender donors may be to encourage existing donors to make personal asks of their community connections.

### Millennials, GenXers, and Older Adults

This report focused on differences across three age groups of LGBT donors: LGBT Millennials (ages 18 to 34; N=934), LGBT Gen Xers (35 to 54; N=2,769), and LGBT Older Adults (ages 55 and up; N=2,920). It aimed to identify the feelings and actions of members of these age groups as donors to LGBT organizations.

- ***Method of contact:*** Mail was the most successful method to solicit donations from LGBT Older Adults; email and an ask made by someone they knew personally were less successful for members of this subpopulation. In contrast, LGBT Millennials were most likely to donate online or through social media, email, and an ask made by someone they knew personally. Gen X respondents were most responsive to an ask made by someone they knew personally and through email.

In an increasingly digital age and with the relatively low cost of digital communications, organizations should consider maintaining contact with donors in the method or methods that have proven successful in the past. Organizations can modernize their giving platforms to appeal to younger donors but also maintain their other methods (e.g., mail) to appeal to older donors.

- ***Message frames:*** Older LGBT people were more likely to donate because they are motivated by the “Stronger together” message frame, which speaks to the importance of their ties to community. Because older people are more likely to be retired or working part-time, organizations may be able to strengthen ties with Older Adults through volunteer opportunities—and increase donations by doing so.

- ***Issue priorities:*** The highest issue priorities among LGBT Older Adults and GenXers were “Ending workplace or employment discrimination,” and “Challenging and changing laws to improve the lives of LGBT people.” Millennials were more likely to rank “Increasing acceptance for transgender people.”

Compared to LGBT Older Adults and Gen Xers, Millennials were far more likely to support efforts by LGBT organizations to prioritize diversity among staff and leadership and to focus more on issues that affect transgender people. Millennials were also more likely to indicate that transgender rights are an issue priority.

When contacting Millennials, organizations should consider prioritizing inclusion and diversity and emphasize political agendas that center on transgender people. Given the date of the survey (before some of the recent, high-profile national attention to transgender issues), this finding may suggest that the Gen X and Older Adult respondents were less familiar with transgender people (research shows that older adults are less likely to personally know a transgender person in comparison to younger populations.) Therefore, organizations may benefit from educational initiatives aimed at increasing familiarity with transgender people among LGB Older Adults.

- ***Bisexual population:*** Millennials were far more likely than Older Adults and Gen Xers to identify as bisexual; 30% of Millennials identified as bisexual vs. 13% of Gen Xers and 8% of Older Adults. The research also found that bisexuals are less likely than lesbian or gay people to be “out” to their family, friends, and co-workers. (Only 28% of bisexuals reported being “out” to all or most of the important people in their lives, compared to 71% of lesbian women and 77% of gay men.)

For these reasons, relying on traditional outreach methods (e.g., trading or purchasing LGBT organizations’ mailing lists) may not be the most effective strategy for reaching bisexual people. Organizations should explore alternative ways to contact bisexual donors that also minimize the risk of outing bisexuals.

APPENDIX 4:  
 Key Recommendations  
 for LGBT  
 Community  
 Centers and  
 Statewide  
 Advocacy  
 Groups

Based on the findings from the LGBT Giving Project’s second phase, and building upon the project’s earlier research, Campbell & Company and Metropolitan Group developed the following set of recommendations for the field of LGBT organizations, particularly community centers and statewide advocacy groups.

**Expand involvement in fundraising among your leadership, including the board and non-development staff.**

Engaging board members, executive leadership, and program staff in the fundraising process is crucial to fostering a culture of philanthropy within any organization. Widespread involvement is especially important for smaller organizations with limited development staff, as it broadens the circle of donors the organization can reach with more personal engagement, and it helps insulate against the impact of turnover by providing donors with multiple personal connections within an organization.

Different leaders in your organization bring different strengths and perspectives to a donor relationship. The executive director can speak to the overall vision and direction, while program staff offer insight into a particular area of your work or the impact a gift had on an individual program participant. Board members can talk about the passion that fuels their support and ask donors to join them with a gift. As the “choreographer-in-chief” of this activity, the director of development helps keep donor relationships moving forward and works with other leaders within the organization to coordinate their involvement.

	Essential	Above Average	Advanced
Board Fundraising Expectations	Set clear fundraising expectations for all board members, including a give/get policy (if you have one) as well as other expectations, such as hosting a house party or introducing prospects.	Ensure fundraising expectations are discussed with prospective board members, explored during orientation for new board members, and assessed and discussed in reviewing current board members.	Meet with board members individually each year to set goals for how they will engage in fundraising that year, including a range of activities that draw on each board members’ strengths, interests, and relationships.
Development Planning	Involve the board in reviewing and monitoring progress on the annual development plan.	Include updates on development in every board meeting, ideally with discussion or action, not only a report out.	Expand the board’s role in development planning, including helping staff craft a multi-year vision for development and set strategy and priorities.



	Essential	Above Average	Advanced
Board Fundraising Activity	<p>Use relationship mapping or peer screening to encourage board members to open doors to prospects.</p> <p>Have board members call to thank existing donors.</p>	<p>Regularly involve board members in cultivation and solicitation meetings with current and potential donors.</p>	<p>Invest in cultivation and solicitation training for board members (and senior staff).</p> <p>Have the board call donors who can upgrade gifts or new donors who have not made second gifts.</p>
Senior Staff Fundraising	<p>Develop a donor portfolio for the executive director or CEO.</p>	<p>Regularly involve senior staff in personal cultivation and solicitation meetings with prospects and donors.</p>	<p>Develop portfolios for key senior staff beyond the CEO, and meet regularly to identify potential donors and advance strategies for donors they know.</p>

### Maximize potential among donors who already know and support you.

Many organizations put their core base of supporters into a fundraising “maintenance mode” in the interest of not wanting to rock the boat, soliciting them for the same gift amounts from previous years and asking them in the same ways. However, loyal donors often have potential to give more and would gladly do so if asked. Additionally, because longtime donors (particularly donors who have given for five years or more) have high retention rates, asking these donors to step up to higher levels of giving is a low-risk strategy that can help maximize the support you already have in front of you.

	Essential	Above Average	Advanced
Upgrading Current Donors	<p>Include an explicit request for an upgraded gift in donor appeals, customizing the ask string to represent a 50% upgrade from the donor's last gift (with a write-in space if the donor wants to give at a lower level).</p>	<p>Incorporate a second-ask program into your appeal calendar, specifically asking donors who have already given for the year to consider a second gift; include a strong case for what additional support will help accomplish and be sure to thank them for the gift they've already made.</p> <p>Encourage loyal donors to sign up for monthly recurring giving, making a case for how the steady revenue will enable your organization to better serve your community.</p>	<p>Introduce or revisit giving circles/clubs to recognize and engage donors, with multiple tiers that motivate donors to increase their giving over time. Instead of "trinkets," use benefits that engage or educate donors, such as invitations to special events and opportunities to hear "insider information" from leadership.</p> <p>Working with the board or a key donor, create a matching gift pool to double the impact of all upgraded gifts within a certain period.</p>
Major Gift	<p>Develop a top 25 prospect list of current individuals or couples who could likely make major gifts (or a larger list for larger organizations).</p> <p>Carve out time for major gifts by holding a prospect strategy meeting with development and the executive director at least every two weeks to review the priority prospect list and assign next steps for outreach.</p>	<p>Conduct wealth screening (through a vendor such as Target Analytics or Wealth Engine) to determine the giving capacity of current supporters and prospects. Use wealth screening results to reexamine and refresh existing portfolios, determining whether staff who have portfolios are managing the "right" prospects and making appropriate progress in advancing relationships.</p> <p>Involve board members and staff leadership in cultivation and solicitation meetings with major gift prospects.</p>	<p>In cultivating prospects for major gifts, explore potential for planned gifts as well, where appropriate.</p>



**Tread cautiously on acquisition.**

Paid acquisition is a long-term investment, but for the stability and growth of your organization, you'll need to keep bringing in new supporters. Approach acquisition (and the subsequent cultivation and stewardship of those donors) strategically, and take advantage of today's political urgency.

	Essential	Above Average	Advanced
Base-building	Engage new stakeholders through social media, activism, and event attendance.	Conduct a paid social media campaign with embedded calls to action to both grow your social media channel and to drive people to your web site/ email opt-in.	Test a paid base-building program (such as an action campaign with Care2.org).
Strategic Ask	<p>Conduct multi-channel (email, targeted direct mail, social media, phone) campaigns at least twice a year to engage new donors.</p> <p>Link to your donation form in the first three paragraphs of your message. Share heartfelt, compelling stories that tap into your reader's values. Include a large "donate" call to action and button.</p>	<p>Leverage Give OUT Day, Giving Tuesday, and other public, collaborative fundraising days for lowcost acquisition. Promote (at little cost) via your website, email and social media.</p> <p>Coordinate appeals and donation landing page language and look and feel.</p>	<p>Test the ROI of renting or exchanging lists with valuesaligned organizations for acquisition appeals.</p> <p>In digital channels, include brief but compelling video stories to either reinforce the solution your organization offers or to show why another donor has chosen to support your organization.</p>
Tap Your Networks	Encourage your supporters to host their own events on your organization's behalf.	Market a turn-key eventhosting tool kit to key stakeholders, offering support and materials commensurate with the potential for the event.	Launch a crowdfunding project to benefit your programs that your supporters can easily promote.



**Do everything in your power to get a second gift from a first-time donor.**

Compared to repeat donors, first-time donors are notoriously difficult to retain. Longtime donors have a roughly 60% retention rate on average, compared to 23% for first-time donors. Although it remains to be seen, the current influx of new donors in the wake of the election could drive first-time donor retention even lower because many donors may have given in a moment of anger, fear, or passion, which they may not sustain when the next giving cycle rolls around.

If you want to retain your new donors, it is crucial to ensure that they feel valued and have opportunities to learn more about your organization before you ask them to give again.

	Essential	Above Average	Advanced
Acknowledgement	Ensure that your gift acknowledgement process is timely and accurate, with acknowledgement letters ideally sent within 48 to 72 hours.	Develop a mailed or electronic new donor welcome packet that provides an overview of your organization, calendar of upcoming events or similar information, and simple gift such as a sticker, if appropriate.	Develop protocols for additional acknowledgement beyond the basic letter based on the gift level, such as a hand-written note from the executive director or a phone call from a board member. Ensure that the gift threshold for more time-consuming activities is high enough to not create a bottleneck of notes to write or calls to make.
Engagement	Invite new donors to an event, if feasible, within two months of their gift.	Provide new donors with discounted ticket rates to one or more events.  Host a new donor conference call or webinar to introduce new supporters to leadership.	Host a (free) new donor welcome event, such as breakfast or tour, with an opportunity to hear from leadership.
Renewal	Ask first-time donors for a second gift within four months, expressing gratitude for the first gift and stressing the impact of continued support; suppress the donor from other appeals until one year after the first gift.	In the second-ask appeal, encourage the donor to sign up for monthly giving or give at whatever level is needed to join the next giving circle tier.	Have board and staff call firsttime donors who have not given again one year later.



## Commit to becoming a more welcoming organization.

The LGBT Giving Project research showed that current donor bases (and many staff and board rosters) of LGBT organizations are homogenous with intersecting privileged identities (mostly male, gay, white, and relatively high income). Right now many in the LGBT community are looking for expertise from leaders in the movement, connection to one another, and opportunities to make a difference, especially at the intersection of other marginalized communities. Consider how your organization can help fill those roles in ways that align with your mission, draw on your existing community connections, and enhance your visibility in the community.

Taking a more inclusive approach to development increases the effectiveness of fundraising and unlocks new resources. By recognizing, respecting, and intentionally engaging people across sexual orientation, gender identity, and cultural backgrounds and committing to relevant, authentic engagement, you can build relationships, capacity, and long-term investment. Effective, inclusive development brings additional perspectives and talents to the table to develop innovative and sustainable solutions to our biggest challenges.

	Essential	Above Average	Advanced
Assessment	Understand the makeup of your key stakeholder groups, including your staff, board, donors, and clients/ program participants. If information on race, gender, gender identity, sexual orientation, age, and other identities is not readily available, consider conducting a survey to better understand your audiences.	If you have identified areas where your organization is not in alignment (for example, if your board does not reflect the diversity of the community you serve), begin discussing these issues internally and with external stakeholders. Be transparent about where you are in your process and what your shortcomings are.	Identify assumptions, preconceived beliefs, or history within your own organization that might undermine your efforts to engage new groups. Assess your progress and next steps for creating a more culturally responsive organization using the tool linked below from the Center to Advance Racial Equity and Portland State University <sup>1</sup> .
Building Relationships	Identify organizations that are working in communities you hope to engage, and show up—consistently—in support of their work long before you ask for anything in return.	Serve as a partner and collaborator to existing organizations or individual efforts that support the communities you hope to engage, ideally efforts that are led by the people impacted (such as trans-led efforts or people-of-color-led work).	If you invite someone to engage in a deeper way with your organization, such as by joining the board, avoid tokenism or “checklist diversity.” Recruit new members in cohorts, offering formal and informal outreach and social engagement, and, if needed, conducting cultural competency training with the board in advance.

<sup>1</sup> [http://www.centertoadvanceracialequity.org/download/i/mark\\_dl/u/4012696615/4617392279/Integrated%20Protocol%20-%20Dec%202014.pdf](http://www.centertoadvanceracialequity.org/download/i/mark_dl/u/4012696615/4617392279/Integrated%20Protocol%20-%20Dec%202014.pdf)



	Essential	Above Average	Advanced
Fundraising	In donor communications and appeals, engage in a way that is sensitive to individuals who hold multiple oppressed identities.	Use donor surveys, cultivation conversations, or focus groups to understand what motivates your donors from different background and what areas of your work they are most interested in supporting; where there are significant distinctions, segment fundraising appeals accordingly to the degree possible.	With any staff or board members engaged in fundraising, consider coaching or training that specifically explores discomfort around money and power dynamics.

**Jointly develop a fundraising plan with metrics that go beyond dollars.**

Creating clearly defined roles and goals for development boosts job satisfaction and provides clearer priorities and expectations for staff and the board. A simple dollar goal that represents a certain percentage increase over the prior year is unlikely to give the development team a clear sense of its day-to-day strategy. When organizations establish more robust development metrics that go beyond the bottom line, staff have a clearer sense of what they need to do to be successful, and they are also more likely to emphasize building relationships with donors rather than focusing on dollar signs.

Additionally, it is crucial that organizations invite development leadership to the table both for development planning and broader organizational planning. This supports a more transparent, inclusive culture and a sense of shared responsibility for your organization’s success, and it provides the development team with a deeper understanding of the organization’s vision, which can be helpful in donor cultivation.

	Essential	Above Average	Advanced
Development Planning	With senior leadership, create a development scorecard with SMART goals across a range of areas (see sample in Appendix B).	With board and senior leadership, establish a fundraising revenue goal informed by projections (anticipated asks in portfolios, wealth screening data, likely retention rates for annual donors, etc.) rather than driven by a straight percentage increase or defined by a budgetary need.	As part of creating the development scorecard, chart a multi-year vision and set of goals for the development operation; this could include longer-term goals such as reducing reliance on foundation funding or building major gift revenue to a certain level over several years.



	Essential	Above Average	Advanced
Organizational Planning	Include development leadership in all executive team (or similar) meetings.	Involve development leadership as an integral part of any organizational strategic planning.	In strategic planning, provide opportunities for donors to offer input, such as through participation on a committee, focus groups or surveys, or a more formal donor feasibility study.

**Focus on recruiting and retaining high-performance development staff, and position your organization to weather turnover when it happens.**

Building and maintaining a strong development department (whether one person or a full team) brings many benefits to your organization. A stable, high-performing staff generates more revenue because your organization is not pulling back on fundraising activity during periods of vacancies in the department. When development staff have built strong relationships with key donors and volunteers, an organization’s ability to retain those staff members provides continuity for these stakeholders, sustaining their connection and boosting their confidence in the organization. Finally, staff who are satisfied and fulfilled in their roles and feel valued bring passion to their work that permeates the culture of the organization.

Although turnover is common in the field, use the strategies below to recruit and retain a strong team.

	Essential	Above Average	Advanced
Defining Roles and Expectations	Set clear fundraising goals for the development team, working collaboratively with development leadership to create these goals and metrics. Then, require accountability to these goals.	Revisit position descriptions to ensure that they align with how team members spend their time and to avoid any blurred lines between roles that can lead to confusion or frustration.	Hold non-development staff—and the board—accountable to their fundraising responsibilities and expectations to help carry the weight of development activity.



	Essential	Above Average	Advanced
Invest in Development	<p>Ensure that the development team has the database and other systems necessary to reliably and capably perform their work.</p> <p>Give development a stake in the organization's future by involving the director in executive team meetings.</p>	<p>Invest in professional development and training for development staff.</p> <p>Review compensation data for the field and evaluate your compensation structure, recognizing that paying more to retain someone strong will likely cost less than having to replace them.</p>	<p>Conduct an ROI analysis of various fundraising revenue streams and determine not only where additional investment may have the most impact but where programs should be scaled back or cut.</p>
Position for Sustainability	<p>Move as quickly as possible to fill any vacancies that occur to minimize the period with a lower level of fundraising activity.</p> <p>If turnover in a senior role occurs, use the hiring of the new staff member as a reason to meet with key donors.</p>	<p>Involve multiple staff and/or board members in key donor relationships to provide continuity in the event of turnover.</p> <p>Ensure that donor interactions are carefully tracked in the database to preserve institutional memory.</p>	<p>Create succession plans for key development roles (and other senior staff).</p>

### Use your database system wisely.

Organizations that understand and maximize use of their database systems are better positioned to use the rich data in the system to inform more strategic decision making. Tracking donor information and activity helps you identify and prioritize top prospects and preserve crucial information on the history of the donor relationship in the event of turnover. Tracking trends and key metrics highlights opportunities for growth or areas that are underperforming and may need revamping. Finally, ensuring that you have clean, updated data reduces the potential for errors that could harm a donor relationship.

	Essential	Above Average	Advanced
Tracking and Reporting	<p>Ensure that your system— and team members working on the system— can manage the fundamental tasks necessary for fundraising operations, including recording all gift transactions and documenting donor relationships and information (ideally including sexual orientation and gender identity).</p> <p>Beyond dollars raised, regularly capture and analyze metrics such as donor retention, upgrading rate, percent of donors making recurring gifts, and lapsed donor renewal.</p>	<p>Proactively use the database system to set reminders for activities, especially with key donors, such as following-up after a solicitation or event.</p> <p>Track the best practice metrics (see previous column) by appeal to understand which perform best.</p> <p>Use the database to capture donor scoring or prospect ratings (such as from a wealth screening), target ask amounts, and cultivation/solicitation strategies.</p>	<p>Consider conducting split (A/B) tests on donor appeals to test different approaches— such as distinct messages, formats, or follow-up strategies— to determine which approaches most appeal to donors. Use the database to capture and analyze results, and adapt strategies as appropriate based on the findings.</p>

