



annual report 2012



horizons foundation

Fueling the LGBT Movement Since 1980

letter from the board chair & executive director



2012 was a thrilling year

for the LGBT movement – a year that was, as we'd hoped, a harbinger of even better things to come.



Unprecedented gains in marriage equality. A sitting president who not only “evolved” on the issue himself, but also spoke again and again about *full LGBT equality*. Breathtaking gains in equality for transgender people, including a landmark decision by the Equal Employment Opportunity Commission. And in November, we made history with wins at the ballot box both for marriage equality and for a record number of LGBT politicians elected to public office.

Horizons Foundation is fortunate and proud to help fuel this movement. Through the generosity of our donors, our institutional partners, and individual legacy gifts, Horizons has furthered this progress for the last 33 years. Our grants now total more than \$25 million. The foundation has fostered, trained, and networked scores of LGBT leaders; we've reached thousands of donors, helping them give with maximum impact to causes that they care about most deeply. And Horizons has created and built the LGBT community's only resource for its long-term benefit, the LGBT Community Endowment Fund.

All of these accomplishments, each of these gains, every inch of this progress, we made *together*. And that “we” includes you.

Now, we carry these gains, this strength and momentum, with us as we continue our work. We know that much work lies ahead before we realize the vision that we *all* share – a time when LGBT people experience full equality, inclusion, and recognition; when our health, safety, and our families are secure; when our youth and elderly can live with pride and dignity; and when we can dream together about our aspirations for our community, rather than exhaust ourselves simply responding to our opponents.

It's quite a list. Yet again this year, we demonstrated our strength and validated what Horizons has always known – that we succeed *together*.

Thank you for all you have done and will do to make this possible. We look forward to continuing this journey *together*.

DAN QUIGLEY
Board Chair

ROGER DOUGHTY
Executive Director

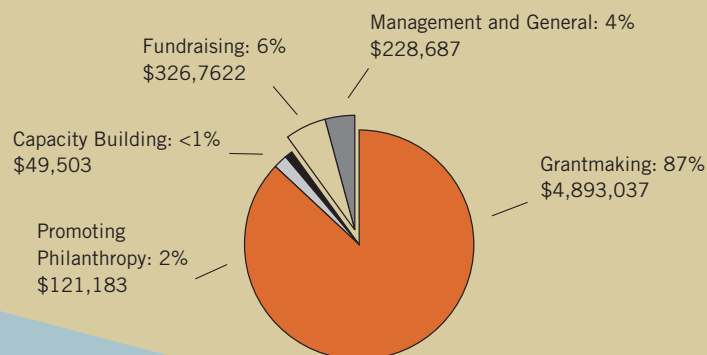
2012 financials

In 2012, Horizons Foundation experienced significant growth in both revenues and assets, resulting primarily from receipt of an especially generous bequest to grow the LGBT Community Endowment Fund and a new donor-advised fund. The \$10 million rise in net assets positions Horizons to increase future grantmaking substantially from both the Endowment Fund and donor-advised funds.

With the use of these gifts and other resources, 90% of Horizons' expenditures in 2012 went to grantmaking, nonprofit capacity building, philanthropic advocacy, and donor programs. Management and fundraising costs accounted for 10% of the foundation's expenditures.

The information presented here reflects the foundation's statement of financial position as of December 31, 2012 and statement of activities for the year ended December 31, 2012. A copy of the complete audit report, which includes comparative information for the year ended December 31, 2011, is available on our website and upon request.

2012 Total Expenses



Statement of Financial Position

AT DECEMBER 31, 2012

ASSETS	
Total Current Assets	\$16,870,773
Other Assets	4,583,385
Total Assets	<u>\$21,454,158</u>
LIABILITIES	
Current Liabilities	\$3,455,440
Long-term Liabilities	508
Total Liabilities	<u>\$3,455,948</u>
NET ASSETS	
Unrestricted	\$11,998,210
Temporarily Restricted	447,195
Permanently Restricted	6,015,811
Total Net Assets	<u>\$17,998,210</u>
Total Liabilities and Net Assets	<u>\$21,454,158</u>

Statement of Activities

AT DECEMBER 31, 2012

OPERATING REVENUE AND SUPPORT	
Contributions from individuals	\$1,567,497
Foundation and corporation grants	8,883,942
Organizations	7,511
Bequests	5,049,159
Fundraising events, net	\$151,012
Total Support	<u>\$15,659,121</u>
Investment income	858,347
Other income	2,442
Total Revenue	<u>\$860,789</u>
Total Operating Revenue and Support	<u>\$16,519,910</u>
OPERATING EXPENSES	
Program services	\$5,063,723
Fundraising, Management, and General	552,449
Total Operating Expenses	<u>\$5,619,172</u>
Change in net assets	10,900,738
Net assets at beginning of year	\$7,097,472
Net assets at end of year	<u>\$17,998,210</u>

A note about this report

To conserve resources—both financial and environmental—Horizons Foundation has moved to a condensed format for printing our annual report, supplemented by downloadable PDFs at www.horizonsfoundation.org.

PHOTO CREDITS: *SIDE ONE: COVER – Left clockwise: Ben Simmons, Lavender Seniors: Cathy Cade; Horizons' Civil Marriage Collaborative donors Kate O'Hanlan, MD, and Léonie Walker: Ana Grillo; Brown Boi Project: Miki Vargas*

Left to right: Tamara Ruiz, LYRIC: Kenny Gong; API Wellness Board Chair Dr. Royce Lin, Assemblymember Phil Ting, Congressman Mike Honda, API Wellness Executive Director Lance Toma, and Supervisor Eric Mar; Sean Dorsey Dance, Fresh Meat Productions: Lydia Daniller

SIDE TWO – Left to right: 2012 Gala Honoree Rep. Barney Frank: Ana Grillo; Our Family Coalition: John Viet; Our Family Coalition: Naomi Bardoff; Members of HYPE (Horizons Young Professionals for Equality)



programs & mission

Horizons strengthens and supports all parts of the LGBT community

Horizons is the world's first LGBT community foundation, and the only nonprofit that supports all parts of the LGBT community throughout the Bay Area. Since 1980, Horizons has granted more than \$25 million to critical organizations that help thousands of people each day. We're often the first to provide grants to emerging nonprofits and a core funder for anchor organizations that advocate for LGBT rights, serve LGBT youth and elders, ensure community health, and promote arts and culture.

Horizons mobilizes a community of donors and funders for greater impact

Horizons fuels the LGBT movement by mobilizing people to increase giving, educating donors, and combining individual donations so that all gifts benefit multiple organizations and thousands of lives. We also advocate for important LGBT causes with mainstream foundations and corporate funders who rely on our 33 years of expertise, bringing millions of additional dollars to LGBT nonprofits.

Horizons actively secures our LGBT community's future for generations to come

Horizons actively secures our community's future by promoting planned giving and building the LGBT Community Endowment Fund, a permanent fund dedicated to meeting the needs, securing the rights, and celebrating the lives of LGBT people – forever.

mission

A community foundation rooted in and dedicated to the lesbian, gay, bisexual, and transgender community, Horizons Foundation exists to:

- Mobilize and increase resources for the LGBT movement and organizations that secure the rights, meet the needs, and celebrate the lives of LGBT people
- Empower individual donors and promote giving as an integral part of a healthy, compassionate community
- Steward a permanently endowed fund through which donors can make legacy gifts to ensure our community's capacity to meet the future needs of LGBT people

horizons foundation

550 Montgomery Street, Suite 700, San Francisco, CA 94111
www.horizonsfoundation.org 415.398.2333

staff, board & advisors

Staff

Francisco O. Buchting, PhD
 Roger Doughty
 Jenna Heath
 Liz Hoadley, CPA
 Nikole Pagan, MPA
 Juni Rusli
 Deb Stallings

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 John Clay Leonard
 Randall Quebec
 Dan Quigley
 Mike Rabanal
 Lisa Schoonerman
 Bev Scott
 Peter Scott
 Susan Shain
 Olga Talamante
 Anthony A. Tansimore*
 Cheryl Traverse*
 Irene White

*Completed service in 2012

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 Margarita Gandia

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 Jeff Lewy
 John Massie
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 Brandon Miller, CFP, CLU
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 Galen Quaring
 Gale Richards
 Susan Shain
 Lia Shigemura
 A. Sparks
 Cheryl Traverse
 Léonie Walker

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 Joyce Newstat
 Thao Ngo
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 Gale Richards
 Vincent Robinson
 Emily Rosenberg
 Lia Shigemura
 Fred Silverman
 Theresa Sparks
 Frances Stevens
 Sam & Julia Thoron
 Peg Van Camp
 Léonie Walker
 Denise Wells
 Hon. Scott Wiener
 Jan Woolsey
 Stan Yogi
 Helen Zia

Acknowledgment

Horizons Foundation offers our deep thanks to board members who completed their service in 2012, especially to Board Chair Angela Berry. Horizons also gratefully acknowledges Jewelle Gomez, who served as our Director of Grants & Community Initiatives from 2006 through 2012.

2012 community grantmaking

Horizons Foundation fuels the work of a wide variety of LGBT organizations through direct financial support. Below are the organizations supported in 2012 through six key grantmaking programs, made possible thanks to the generosity of our donors, institutional partners, and contributors to the LGBT Community Endowment Fund. (Total grants and grant commitments equaled \$4.5 million. For a more complete list of 2012 grants, please visit www.horizonsfoundation.org/page/organizations/grantees.)

Community Issues Grants

The cornerstone of Horizons' grantmaking, intended to provide general operating and project-specific support to organizations and programs serving the San Francisco Bay Area community.

Alternative Theater Ensemble	\$2,000
Bay Area American Indian Two-Spirits	\$6,107
Bay Area Young Positives	\$5,000
Big Joy Project	\$5,000
Brown Boi Project	\$5,000
Community United Against Violence	\$5,000
Dimensions Clinic	\$6,500
Face Value, a project of the Tides Center	\$15,000
Fresh Meat Productions	\$4,000
Gente Latina de Ambiente	\$5,000
Instituto Familiar de la Raza	\$2,500
Lesbian Health & Research Center at UCSF	\$5,000
LIKHA Pilipino Folk Ensemble	\$1,000
Lyon-Martin Health Services	\$10,000
LYRIC	\$10,000
Marea Media	\$4,000
Mexican Heritage Corporation	\$8,000
National Center for Lesbian Rights	\$15,000
Native American AIDS Project	\$5,000
New Conservatory Theatre Center	\$10,000
Oakland Pride	\$5,000
Old Lesbians Organizing for Change San Francisco Bay Area Chapter	\$3,000
Our Family Coalition	\$5,000
Outlet Program	\$2,500
OutLoud Radio	\$2,500
Pacific Center for Human Growth	\$3,500
Queer Women of Color Media Arts Project	\$6,000
RADAR Productions	\$5,000
Rainbow Women's Chorus	\$1,500
San Francisco Dyke March	\$10,000
San Francisco LGBT Community Center	\$15,000
San Francisco Pride at Work	\$2,500
San Francisco Trans March	\$5,000
San Francisco Transgender Film Festival	\$3,000
Somos Familia	\$2,500
Transgender Law Center	\$10,000
Transgender, Gender Variant & Intersex Justice Project	\$5,000
TOTAL:	\$216,107

Intentional Change Fund Grants

Supports organizations that are exploring ways to reduce costs and strengthen programs through mergers, acquisitions, the sharing of back-office functions, and other means.

Brown Boi Project	\$5,000
Castro Country Club	\$7,500
Lavender Seniors of the East Bay	\$7,000
LYRIC	\$5,000
Outlet Program	\$6,500
TOTAL:	\$31,000

LGBT WISE Grants

Supports Bay Area organizations working to improve access and services to meet the needs of LGBT elders and promote healthy aging.

Lavender Seniors of the East Bay	\$10,000
Openhouse	\$20,000
Rainbow Community Center of Contra Costa County	\$13,000
San Francisco LGBT Elders Research Project	\$10,000
Spectrum LGBT Center	\$15,000
TOTAL:	\$68,000

Youth Capacity-Building Grants

Funds organizations working to create environments that foster complete well-being for LGBT youth in their neighborhoods, families, and schools in Alameda and Contra Costa Counties.

Pacific Center for Human Growth	\$12,000
Rainbow Community Center of Contra Costa County	\$10,000
RYSE Center	\$17,500
Somos Familia	\$17,500
Youth UpRising	\$15,000
TOTAL:	\$72,000

Fund for Advocacy and Political Initiatives Grants

Supports public education projects that further the rights and equality of LGBT people.

Rock the Vote	\$50,000
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Civil Marriage Collaborative Donor Circle Grants

Funds Horizons Foundation's participation in the Civil Marriage Collaborative, a national group of funders making strategic grants to help achieve civil marriage equality for same-sex couples throughout the U.S.

Proteus Fund	\$67,950
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Coming Home Advisors Grants

Funds LGBT-serving organizations that support culturally appropriate health care and social services for LGBT elders and creates financial resources for long-term future of the LGBT community.

Institute on Aging	\$30,000
Openhouse	\$30,000
TOTAL:	\$60,000

Red Envelope Giving Circle Grants

Funds projects and organizations working to improve the lives of the Asian American and Pacific Islander (AAPI) LGBTQ community in the Bay Area.

Asian & Pacific Islander Family Pride	\$2,900
Community Health for Asian Americans	\$1,200
Queer Cultural Center	\$2,265
TOTAL:	\$6,365

institutional partners



Adler & Colvin
 Allianz Insurance
 American Civil Liberties Union
 of Northern California
 Angry Otter
 Bank of San Francisco
 Butler Golf
 Castro Starbucks
 Chubb and Son
 Coldwell Banker Residential Brokerage
 Community Thrift
 Courtney's Insurance &
 Tax Services
 Deloitte Tax LLP
 Destino
 Diesel USA Inc.
 Eros - Brazen Grace Squad LLC
 Ettinger Foundation, Inc.
 Financial Connections Group
 Financial Fitness Center, Inc.
 Fountaingrove Lodge
 Gold Coast Grill & Catering DBA
 Burlingame Crepes
 Goldstein, Gellman, Melbostad,
 Harris & McSparran, LLP

Great American Insurance Group
 Harvey's
 Hot Cookie
 Integral Financial Solutions, LLC
 Jane Brindle Miller, Attorney at Law
 JLC and CVL Enterprises
 JP Morgan Chase Bank N.A.
 Kasa Indian Eatery
 Katten Muchin Rosenman
 Foundation Inc.
 Kevin J. Mossier Foundation
 Law Office of Aubrey Hone
 Law Offices of Diane R. Cash
 LGMA Corporation (DBA Bisou Bistro)
 Louie's Barber Shop
 Maco Construction
 Merck Sharp & Dohme Corp.
 Merrill Lynch
 Metropolitan Lounge, Inc / The LookOut
 Moby Dick Bar
 Mollie Stone's Markets
 Napa Valley Unity League

National Center for Lesbian Rights
 Nelson & Bernstein, LLC
 Northern California Community
 Loan Fund
 Out & Equal Workplace Advocates
 P O Plus Corporation
 Peregrine Group, LLC
 Poesia Restaurant
 ProAction Athletics
 Rainbow Grocery
 Robasciotti & Associates, Inc.
 RTJ Castro Entertainment, Inc.
 DBA Q Bar
 RTJ Rising Sun, Inc.
 DBA Midnight Sun
 Sally Morin, Attorney at Law
 Sam's Chowder House
 San Carlos Flight Center

San Francisco Police Officers
 Pride Alliance
 Shanti
 Shearman & Sterling, LLP
 Shorenstein Properties LLC
 Spunk Salon
 Sutter Bay West Hospitals
 The Edge
 The Harrison Team at
 Sotheby's International Realty
 Twin Peaks Tavern
 US Bank
 Walden Asset Management/Boston Trust
 & Investment Management Company
 Winetasting.com
 Woodruff-Sawyer & Co.



individual donors

We're deeply grateful to all of our donors for their invaluable support in 2012. Without their generosity and commitment, none of our work would be possible. Leadership Circle members, listed below, have a powerful impact on the foundation's work both today and into the future.

For the full list of our 2012 donors—including the Loyalty Circle donors who are there year after year to support our community and serve as proud examples of LGBT philanthropy—please visit www.horizonsfoundation.org.

Leadership Circle

Visionary (\$25,000 or more)

- * Anonymous
- * Emily Rosenberg & Darlene de Manincor
- * Estate of Joseph A. Rosenthal
- * Estate of William J. Sullivan

Cornerstone (\$15,000–\$24,999)

- * Lesbians for Good, a donor-advised fund of Horizons Foundation
- * Estate of Eugene G. Maurer

Advocate (\$10,000–\$14,999)

- * The Live Oak Fund, a donor-advised fund of Horizons Foundation
- * Tom Burke & Axel Brunger
- * William Snider & Brian Cameron

Builder (\$5,000–\$9,999)

- * Alvin Baum
- * Estate of Robert Blair
- * Jessica Anne Clarke, MD, PhD
- * Robert W. Clegg & Jorge Rey-Prada
- * David M. Cover & Christopher Sellars
- * Anne Sterling Dorman, CPA
- * Bob Fuller
- * Margarita Gandia & Vivian Stephenson
- * Nanette Gartrell, MD & Dee Mosbacher, MD, PhD
- * Dan Joraanstad & Bob Hermann
- * Deb L. Kinney, DLKLaw Group PC
- * Lawrence R. Kolka & Ian J. MacWilliams
- * Joq S. Lasner
- * Jeff Lewy & Ed Eishen
- * Susan E. Lowenberg & Joyce Newstat
- * Ferolyn T. Powell
- * Beverly A. Scott & Mary Anne Courtney
- * William S. Shelley & Curtis Chun
- * Cheryl Traverse

Sustainer (\$2,500–\$4,999)

- * Paul F. Albert
- * Rosio Alvarez & Juana Maria Rodriguez
- * David P. Black
- * Morton B. Blatt & Peter G. Holmstrom
- * Douglas S. Braley & James S. Otwell
- * William Charles Brockett, Jr. & Lawrence William Bryer
- * Robert D. Dockendorff
- * Roger Doughty & Royce C. Lin
- * Robert G. Evans & Terry Micheau
- * Alice Fishman

- * Prescott W. Hafner & William D. Glenn
- * Kevin Herglotz & James Maxwell
- * James C. Hormel & Michael P. Nguyen
- * Giselle A. Jurkanin & Kristin A. Cooper
- * Jan Marks
- * Karen McVeigh & Cynthia Luna
- * Donald C. Myers & Jose L. Iglesias
- * Dan Neumann & David Richardson
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- * Dale Rettinger
- * Gale K. Richards & Ruth Dawson
- * Gary Roof & Douglas Light
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- * Susan Shain & Roberta Achtenberg
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- * Lia Shigemura & Helen Zia
- * Sam & Julia Thoron
- * George D. Tuttle & F. Bennett Cushman, II
- * Peg Van Camp & Carol Patterson
- * Stanley Watson & Emanuel Anes

Supporter (\$1,000–\$2,499)

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- * Ahimsa Fund, a donor advised fund of Horizons Foundation
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- * Miles S. Amen & Christopher A. Magan
- * Elisabeth Andreason & Melissa Allen
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- * Daniel Jae-Won Lee
- * Hon. Mark R. Leno
- * John Clay Leonard
- * Lesbian Equity Fund - Kathy Levinson & Naomi Fine
- * Kerry Lobel & Marta Drury, girls just wanna have funD, a donor-advised fund of Horizons Foundation
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- * Ron Wong & Mike Tekulsky
- * Paul S. Woolford & Rick Freeman
- * Jan E. Woolsey
- * Sonni Zambino
- * Jan Zobel, EA

* Denotes members of our Leadership Circle, who made non-event-related gifts of \$1,000 or more in 2012.

Legacy Circle

Horizons' Legacy Circle honors individuals and couples who have included the foundation in their financial planning by making a bequest in a will, creating a trust, or designating Horizons as the beneficiary of an insurance policy, retirement plan, security, or other asset. Through Horizons' LGBT Community Endowment Fund, legacy gifts help ensure that future generations will have unprecedented financial resources to address community needs that we cannot predict today.

Anonymous (36)
Dominick Albano
Paul F. Albert
Kathleen Archembeau
Salvatore J. Baglieri & Peter J. Cirincione
Bill Baird & John Kennedy
Hiram Banks & Roberto Lee
Dan Bartley
Angela Berry
Alvin Baum
Alma Soongi Beck, JD, LLM Taxation
Buzz Bense
Adam M. Berman
Jack E. Bird & John L. Darby
Matt Bissinger
David P. Black
Morton B. Blatt & Peter G. Holmstrom
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Edward Vanegri
Greg Walker
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