LGBT Giving Project

PROJECT REPORT

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Introduction

Based on research done by the Movement Advancement Project prior to 2015, at most only 3.4% of LGBT people in the country were giving to the 39 largest LGBT advocacy organizations in the nation. To increase the proportion of LGBT people financially supporting the LGBT movement, a collaborative of funders launched the LGBT Giving Project. Phase I of the project began in 2012 as an unprecedented research effort to help uncover who has the will and capacity to give more, what motivates them, and what frames and messages could increase their giving

Beginning in 2015, Phase II sought to apply these learnings with two cohorts of LGBT organizations, with the objective of determining the most effective strategies for increasing charitable giving from LGBT individuals to LGBT organizations. Two consulting firms (Campbell & Company and Metropolitan Group) worked with nine organizations—four LGBT community centers (the CenterLink cohort) and five statewide advocacy groups (the Equality Federation cohort). Over roughly two years, the organizations engaged in organizational assessments of their fundraising programs, group training sessions and peer learning, specific testing of fundraising messages and strategies (mail and email appeals, surveys, and social media), and individualized technical assistance to advance fundraising performance.

Context

Phase II of the LGBT Giving Project began in June 2015, the same month that the U.S. Supreme Court made its landmark decision guaranteeing same-sex couples the right to marry. Given that marriage equality had served as a focal point for much of the LGBT movement, the Supreme Court decision introduced questions about where the movement would concentrate its efforts next, whether existing donors would remain motivated to support LGBT causes, and whether LGBT organizations would be able to attract new supporters in this new environment. Work with the two cohorts provided fertile ground for exploring these questions in real-time.

Throughout the project, the landscape for the LGBT movement continued to shift. In June 2016, the shooting at the Pulse nightclub in Orlando brought tragedy on a massive scale to the LGBT community. In many states, LGBT advocates battled legislative backlash against the gains the movement had achieved, including anti-trans "bathroom" bills, "religious freedom" acts, and similar efforts to curtail the rights of LGBT individuals. The rise of Black Lives Matter and other progressive movements brought a broader awareness to the importance of inclusivity and intersectionality among LGBT organizations, especially considering the risk of violence and discrimination that those who hold multiple marginalized identities face, such as transgender women of color.

Donald Trump's victory in the 2016 presidential election changed the game for LGBT organizations, as for many other progressive causes. Many organizations, including those taking part in the LGBT Giving Project, saw immediate increases in donors, advocates, and volunteers following the election, but that silver lining was clouded by uncertainty over what the new administration's policies and divisive rhetoric

may mean for the LGBT community. Indeed, in the days immediately following the election, the Southern Poverty Law Center reported spikes in hate crimes, including those against LGBT individuals. Since then, federal moves such as revoking protections for transgender students and barring transgender individuals from military service have come alongside continued state-level attacks on LGBT rights.

Key Findings

FUNDRAISING RESULTS

Our analysis focuses on the 18-month period of July 2015-December 2016, comparing this period to a baseline 18-month period for each organization.

- During this period, the nine organizations collectively raised **$2.58 million more** than they had in the baseline period, **an increase of 33% in dollars raised**, from **1,783 more donors** than in the prior period, **a modest increase of 9% in total donors**.

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

- 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.

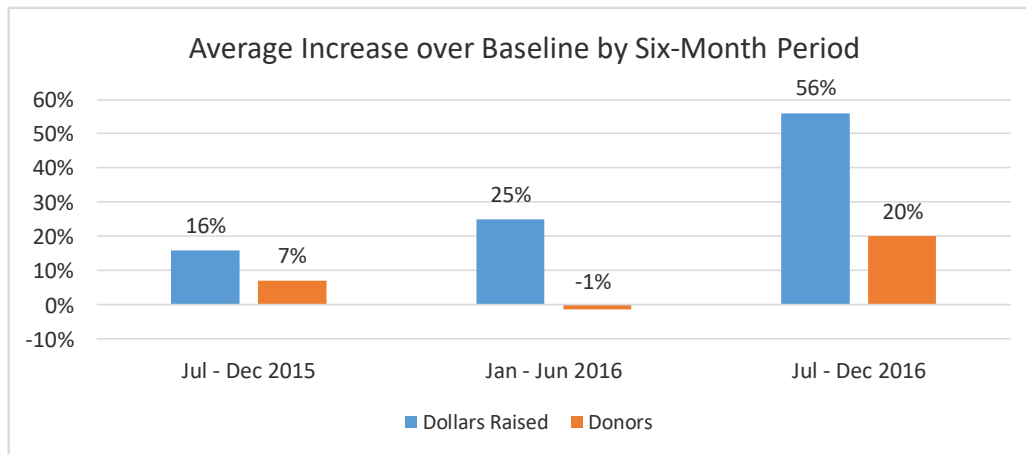| Organization	Increase in Dollars Raised Over Baseline	Increase in Donors Over Baseline
Pride Center at Equality Park	20%	12%
William Way LGBT Community Center*	-1%	34%
GLBT Community Center of Colorado	2%	28%
LGBT Community Center of Greater Cleveland**	85%	-14%
Georgia Equality	17%	-9%
Equality New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

*   *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.*

** *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.*

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- 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:

Average Increase over Baseline by Six-Month Period

Period	Dollars Raised	Donors
Jul - Dec 2015	16%	7%
Jan - Jun 2016	25%	-1%
Jul - Dec 2016	56%	20%

DONOR UPGRADING

- The significant increase in dollars raised against a more modest increase in total donors suggests that organizations have been most effective at encouraging current donors to upgrade to higher levels of giving. While not all organizations reported on specific upgrading activity, those that did confirmed that increasing giving from current donors has been an important growth strategy:

  o For the Pride Center, 49% of current donors responding to the 2016 year-end appeal upgraded their gifts, on average increasing their donations by 130%. The Pride Center also saw a 9% increase in the number of individuals giving $1,000 or more.

  o The Colorado community center increased its average gift from $392 to $449, a 15% increase, and it increased the number of individuals giving $1,000 or more by 43%.

  o Equality Virginia had a stable number of donors giving $1,000 or more, but these donors increased their average gifts from $4,776 to $6,893, a 44% increase.

DONOR ACQUISITION

Although most organizations saw modest gains in the total number of donors supporting their work, specific initiatives seeking to bring in new, first-time donors showed nominal results.

- The 2015 year-end appeal for community centers focused on engaging new donors but achieved a low response among this segment of 0.44%. This response rate was roughly the same in the 2016 year-end appeal (0.41%), although the average gift from first-time donors grew from $57 to $78.
- Georgia Equality tested two acquisition approaches, one with mailing list subscribers who had not yet donated and the other with a voter file list purchase. Both had a fairly good response rate of

0.70%, but the voter file list yielded extremely low average gifts, making this acquisition quite costly at $6.01 per dollar raised. The subscriber mailing list produced stronger first-time donors with an average gift of $113, but was still costly at $1.92 per dollar raised.

- Following the election, we tested a Facebook video ad, using boosted ads to target non-donors. Comparing the number of donors during the time the ad ran to the number of donors each organization had in the period immediately before the ad, the ad appeared to generate 29 additional donors across the participating organizations but was not a good return on investment.

DONOR MESSAGING

The LGBT Giving Project's second phase tested the efficacy of various message frames that were included in the survey work completed in the first phase.

- CenterLink organizations used year-end appeals and a donor survey to test an activist-oriented message (akin to the "equality" frame from Phase I) against a community-focused one (similar to the "stronger together" frame from Phase I). Prior to the election, existing donors slightly preferred the community-oriented message, whereas non-donors responded more positively to the activist message.
- Equality Federation organizations tested an "equality" message against the "stronger together" frame using appeals, Georgia Equality tested several additional message frames through Facebook ads, and the 2016 appeals tested the activist and advocate archetypes included in the first phase. For Georgia, non-donors preferred the equality message, and current donors responded best to the "stronger together" message.
- 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, as shown in the table below.

CenterLink Year-Over-Year Appeal Comparison*		
Metric	**2015**	**2016**
Revenue	$7,447	$10,365
Total Recipients	25,613	12,118
Lapsed Donor Response Rate	0.47%	2.60%
Non-donor Response Rate	0.44%	0.41%
Lapsed Donor Average Gift	$72	$103
Non-donor Average Gift	$57	$78
Total Cost to Raise a Dollar	$2.13	$0.46
Lapsed Donor Cost to Raise a Dollar	$2.14	$0.21
Non-donor Cost to Raise a Dollar	$2.11	$1.07

* Notes: For comparative purposes, this table does not include giving from current donors in 2016 because this audience was suppressed from most centers' 2015 mailings.

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OPERATIONS AND STAFFING

- Throughout the course of the project, 7 of the 10 original organizations experienced turnover of the Director of Development and/or Executive Director, and one organization withdrew early in the project after turnover in both roles. Of 25 key individual participants, 10 turned over during the project. After the end of Phase II, two additional staff members left their organizations: one executive director and one development director.

> ### *The Challenge of Turnover*
>
> ***7 of 10 organizations*** *experienced turnover in the DOD and/or ED role during the project*
>
> ***10 of 25 individuals*** *who took part in the project at some point have left their organizations*

- During periods of turnover with vacancies in the director of development role, organizations were more likely to experience a downturn in dollars raised, either a decline during that period from the baseline period or a slowing of momentum. This underscores the challenge that turnover presents to organizations seeking to sustain progress in growing their fundraising programs.

- In a brief survey of participants prior to a series of development planning webinars, respondents highlighted three areas as most in need of improvement: open communication between the ED and DOD, a clear process for setting goals and fundraising metrics, and an enhanced understanding of philanthropy throughout the organization. The strongest areas operationally that they identified were annual planning for development and investing in fundraising and technology.

BOARD ENGAGEMENT

- Most organizations taking part in the project had limited engagement in fundraising from their boards. Representatives from the organizations' boards took part in a board-specific webinar, and discussions and trainings at the convenings explored board engagement in greater depth, including highlighting the steps organizations have taken to involve their boards more fully in fundraising, such as phone banking to solicit or thank donors, fundraising training around a campaign, and leveraging board matches to motivate donors.

EQUITY AND INCLUSION

- At the first convening, a panel discussion about diversity, equity, and inclusion within organizations' staffs, boards, and donor bases revealed that this was an area where organizations had struggled to make headway but were committed to improvement.

- The donor survey of the CenterLink cohort following that convening confirmed that most of the

> ### *Demographic Snapshot (CenterLink Donor Survey)*
>
> - *63% male*
> - *97% cisgender*
> - *90% white*
> - *28% 65 or older*
> - *50% income over $100,000*
> - *80% somewhat or very liberal*

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participating centers had predominantly white, male, and older donor bases, aligned with the demographics of the typical donor profile from the first phase of research. Notably, the two centers with women as Executive Directors (Cleveland and Colorado) had significantly larger proportions of female-identified donors.

- The topic of equity and inclusion remained important in subsequent convenings, with a training around how to conduct an equity assessment in the second convening and a case study in the third convening of Equality New Mexico's success in radically transforming the makeup of its board over the span of several years. However, like board engagement, this remains an area of challenge for the participant organizations as well as the field more broadly.

SUMMARY OF TAKEAWAYS

- Periods of **turnover** in development staff correlate to a decline in total dollars raised in that same period.

- Explicitly asking a donor to **upgrade** their giving by a specific amount can have an immensely positive impact on average gift size.

- **Direct mail** can still be a profitable fundraising vehicle – if sent to strategically targeted segments.

- While **acquisition** may not yield scores of new donors, the timing given the current political challenges the LGBT community faces may be more advantageous now than it had been immediately post-marriage equality.

- While it became clear that **Facebook** was not the best channel for converting cold leads into donors, we did find it a good way to engage new people. There is measurable value to Facebook when approaching it as a platform, rather than a collection of individuals. The question isn't, "What is the value of a Facebook Fan?" but "How do I make my Facebook fans valuable?"

- The **message test** results showed modest preferences for different messages among distinct donor types, but what appeared to have the most significant impact was making a strong, timely case for support and proactively asking for support at an opportune moment.

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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 the following set of recommendations for the field of LGBT organizations, particularly community centers and statewide advocacy groups.

Each of the recommendations that follows provides a brief rationale and includes a table of steps for how organizations at different levels can work toward implementing the recommendation.

These 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.

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

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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	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).	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. 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.	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. 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.
Major Gifts	Develop a top 25 prospect list of current individuals or couples who could likely make major gifts (or a larger list for larger organizations). 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.	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. Involve board members and staff leadership in cultivation and solicitation meetings with major gift prospects.	In cultivating prospects for major gifts, explore potential for planned gifts as well, where appropriate.

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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 Asks	Conduct multi-channel (email, targeted direct mail, social media, phone) campaigns at least twice a year to engage new donors. 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.	Leverage Give OUT Day, Giving Tuesday, and other public, collaborative fundraising days for low-cost acquisition. Promote (at little cost) via your website, email and social media. Coordinate appeals and donation landing page language and look and feel.	Test the ROI of renting or exchanging lists with values-aligned organizations for acquisition appeals. 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.
Tap Your Networks	Encourage your supporters to host their own events on your organization's behalf	Market a turn-key event-hosting 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

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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 first-time donors who have not given again one year later.

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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[1].

1

http://www.centertoadvanceracialequity.org/download/i/mark_dl/u/4012696615/4617392279/Integrated%20Protocol%20-%20Dec%202014.pdf

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.
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.
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.

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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.
Invest in Development	Ensure that the development team has the database and other systems necessary to reliably and capably perform their work. Give development a stake in the organization's future by involving the director in executive team meetings.	Invest in professional development and training for development staff. 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.	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.
Position for Sustainability	Move as quickly as possible to fill any vacancies that occur to minimize the period with a lower level of fundraising activity. If turnover in a senior role occurs, use the hiring of the new staff member as a reason to meet with key donors.	Involve multiple staff and/or board members in key donor relationships to provide continuity in the event of turnover. Ensure that donor interactions are carefully tracked in the database to preserve institutional memory.	Create succession plans for key development roles (and other senior staff).

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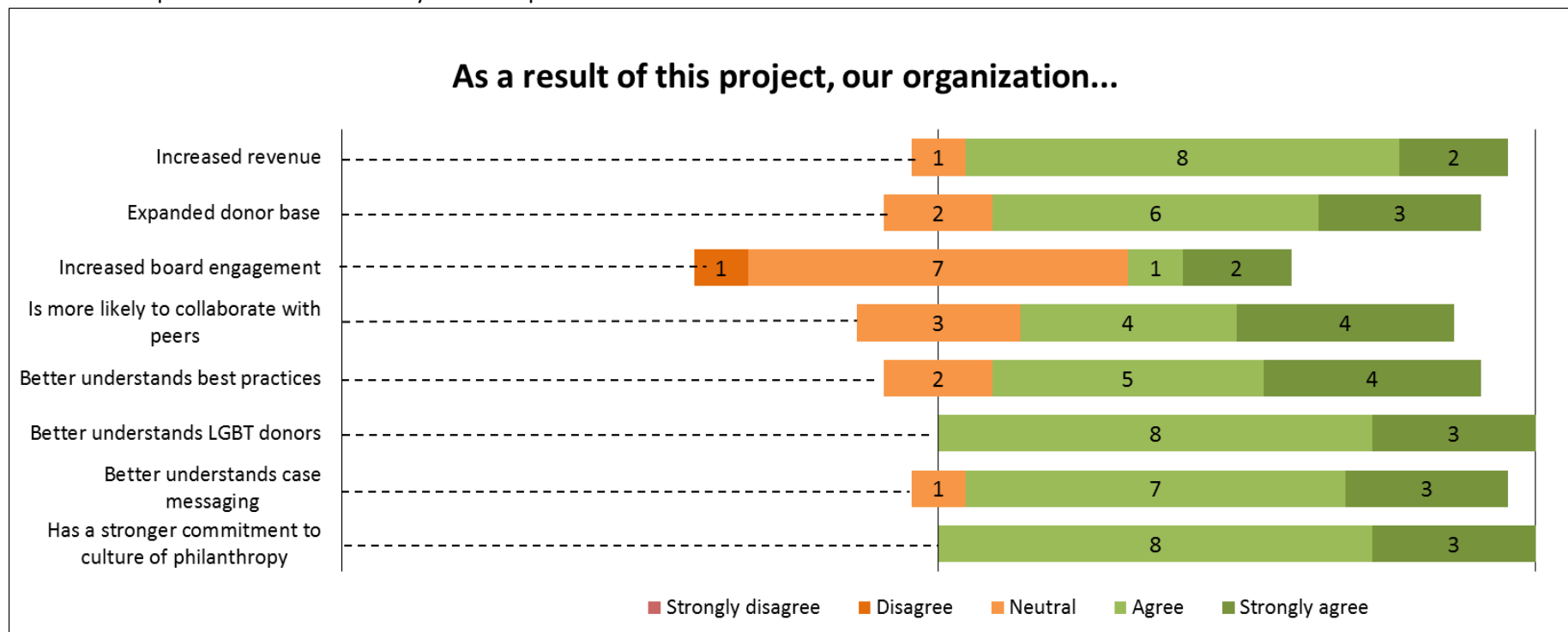
Use your database system wisely.

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	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). Beyond dollars raised, regularly capture and analyze metrics such as donor retention, upgrading rate, percent of donors making recurring gifts, and lapsed donor renewal.	Proactively use the database system to set reminders for activities, especially with key donors, such as following-up after a solicitation or event. Track the best practice metrics (see previous column) by appeal to understand which perform best. Use the database to capture donor scoring or prospect ratings (such as from a wealth screening), target ask amounts, and cultivation/solicitation strategies.	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.

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Appendix A: Project Evaluation

Prior to the final project convening, Executive Directors and Directors of Development from each of the participating organizations were invited to complete an evaluation survey. Their responses are below.

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

Statement	Disagree	Neutral	Agree	Strongly agree
Increased revenue		1	8	2
Expanded donor base		2	6	3
Increased board engagement	1	7	1	2
Is more likely to collaborate with peers		3	4	4
Better understands best practices		2	5	4
Better understands LGBT donors			8	3
Better understands case messaging		1	7	3
Has a stronger commitment to culture of philanthropy			8	3

■ Strongly disagree   ■ Disagree   ■ Neutral   ■ Agree   ■ Strongly agree

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Appendix B: Project Participants

CenterLink Cohort

Pride Center at Equality Park

GLBT Community Center of Colorado

LGBT Community Center of Greater Cleveland

William Way LGBT Community Center

Equality Federation Cohort

Georgia Equality

Equality New Mexico

Equality North Carolina

Equality Texas

Equality Virginia

Appendix C: Project Funders and Leadership

Campbell & Company and Metropolitan Group wish to thank the LGBT Giving Project's funders and steering committee members for their leadership and support of this crucial work.

- Evelyn & Walter Haas, Jr. Fund
- Horizons Foundation
- Kevin J. Mossier Foundation
- Movement Advancement Project
- Pride Foundation
- Small Change Foundation
- D-5 Coalition
- Henry Van Ameringen Foundation
- Anonymous Donors
- Richard Burns (Lead consultant)