

To Fund a Movement

Executive Summary for a National Strategy on LGBTQ Planned Giving

Every day, LGBTQ organizations work in countless ways for true lived and legal equality for all LGBTQ people at local, state, national, and international levels. As drivers of a still relatively young movement, LGBTQ organizations and champions have helped bring about monumental cultural and political progress, persevered in the face of daunting setbacks and threats, and dramatically improved the lives of millions of individual LGBTQ people.

Yet the near- and longer-term strength of the great majority of LGBTQ organizations is a perennial, fundamental challenge. Most operate on proverbial shoestrings, struggling to raise the funds their work requires. At the same time, the movement as a whole—and its funders—lack a clear strategy for building sustainability in the years and decades to come. In other words, while these organizations dedicate themselves to securing a brighter future for LGBTQ people, focusing on their own futures presents a significant challenge. That underinvestment in our movement’s future puts all our progress at risk.

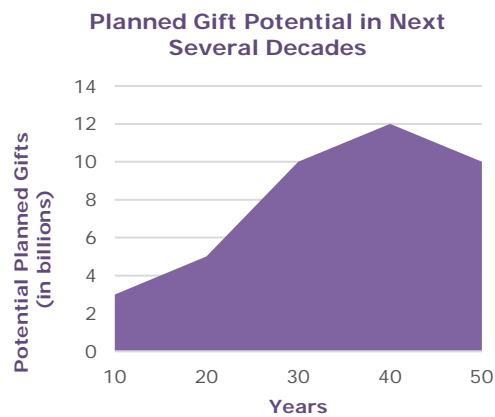
Imagine an LGBTQ movement strong enough to meet whatever comes our way. Imagine a movement with the resources to achieve *and safeguard* full equality. Imagine the impact of a better-funded movement not only on the issues of the next decade – but for generations of LGBTQ people to come.

This possibility is entirely within our grasp.

A Singular Window of Opportunity

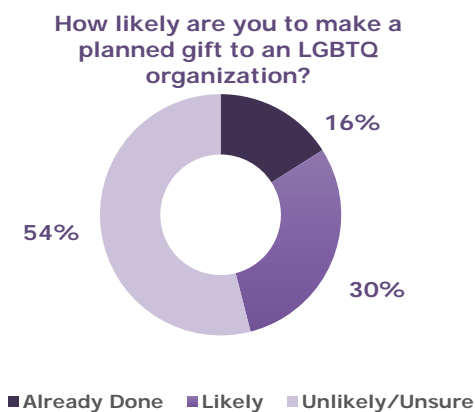
Right now, the LGBTQ movement has an unprecedented but time-limited opportunity to fuel the work of its nonprofits, safeguard progress, and power a movement built to last. That opportunity lies in planned giving, charitable contributions typically made from a donor’s assets upon their death. Planned giving represents, by a large margin, the single most powerful way LGBTQ individuals can sustain the movement for generations to come.

Throughout 2017, a group of 15 LGBTQ-focused funders and leaders of LGBTQ organizations from around the country worked together to research this opportunity and develop a strategy for a movement-wide planned giving effort. This strategic work, supported by a grant from the Arcus Foundation, uncovered four critical findings, shown on the following page.



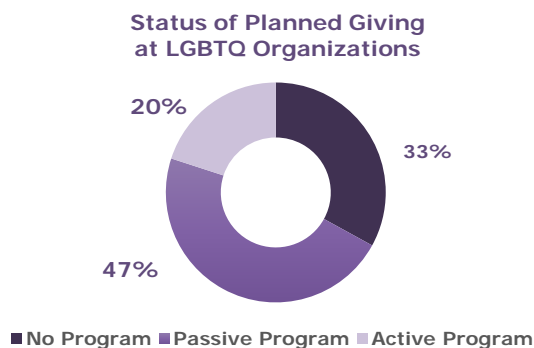
Planned giving represents an unparalleled opportunity for the LGBTQ movement.

As part of the largest-ever generational transfer of wealth, LGBTQ individuals have the potential to direct an **estimated \$8 billion in planned gifts to LGBTQ nonprofits over 20 years and as much as \$40 billion over the full 50 years of the wealth transfer.** Because nearly two thirds of LGBTQ people do not have children and individuals with no children are nearly three times more likely to make planned gifts, the philanthropic impact these individuals could have is dramatic, but only if the movement takes steps now to encourage their generosity.



LGBTQ people are open to making planned gifts to LGBTQ causes.

Planned gifts typically result from a strong, often-lifelong affinity for a cause. Many in the so-called “Stonewall generations” identify deeply with the LGBTQ community, as they have lived through extreme discrimination, the horror of the AIDS crisis, and the great strides of the past several decades. Recent research backs this up: a remarkable **16% of LGBTQ donors indicated they had *already* arranged a planned gift to an LGBTQ organization, and another 30% said that they would be likely to.**



Organizations are severely under-resourced in planned giving.

Most LGBTQ organizations have not yet invested in planned giving, invariably because they focus their limited bandwidth on more immediate fundraising priorities. Among a group of 55 organizations surveyed for this project, **80% had no planned giving program or only a passive program that had realized few gifts.**

There will never again be a time when the movement’s opportunity in planned giving is as great as it is today.

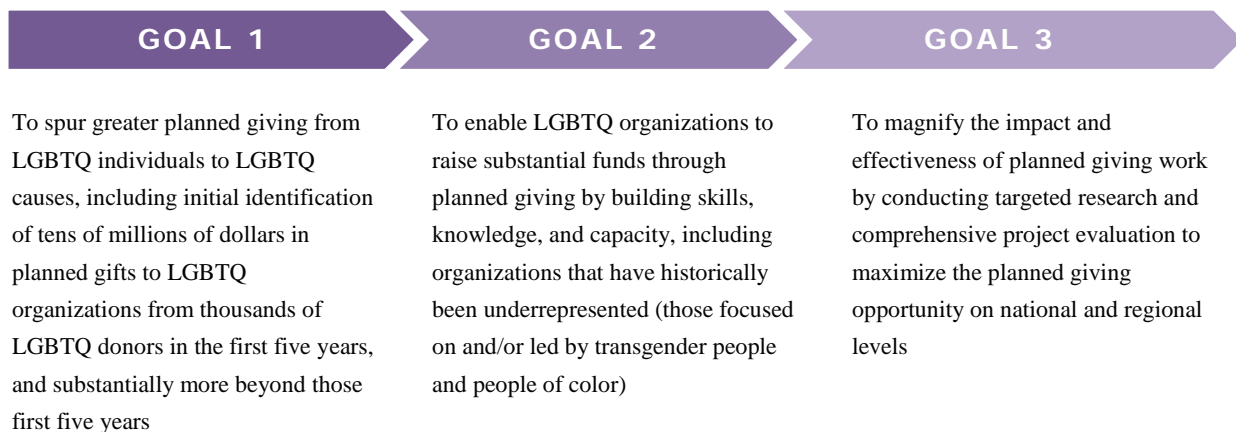
The greatest opportunity for growing LGBTQ planned giving is now.

Historical circumstances make the next **10 to 20 years** the most critical time to take advantage of this singular opportunity. The generational transfer of wealth will peak during this window, more LGBTQ people will choose to raise children, and the “Stonewall generations” will be—for a limited time—in their prime years for making planned gift commitments.

A National LGBTQ Planned Giving Strategy

Based on these findings, the National Task Force on LGBTQ Planned Giving has developed recommendations for a movement-wide planned giving strategy over the next five years, with an estimated cost of \$5 million. Such a five-year period, however, would mark only the beginning of realizing the movement's potential, as the lessons, models, and successes of the initial period could be leveraged through replication for many years to come.

The vision animating this strategy is *an LGBTQ movement and LGBTQ communities throughout the country with the financial resources necessary to secure and safeguard the full legal and lived equality of every LGBTQ person*. The Task Force believes that—with significant, strategic, and sustained investment—planned giving can become a primary and enduring source of financial support for LGBTQ causes. The strategy's primary goals are:



To accomplish these goals, the Task Force created a five-year strategy with four complementary components

Resource Warehouse

This website would provide templates, tools, and training that organizations could leverage for planned giving, making practical resources widely available to hundreds of LGBTQ organizations and avoiding significant duplication of effort.

National Campaign

A national marketing campaign can raise awareness of planned giving as a meaningful opportunity to leave a personal legacy and raise significant future support for LGBTQ causes, particularly as the 50th anniversary of the Stonewall uprising approaches.

Regional Pilot Projects

Multi-year cohorts would help participating organizations raise planned gifts while also testing models and messages to replicate at a greater scale. Each pilot would consist of a small group of organizations supported through training, technical assistance, and financial incentives.

Ongoing Research

Continued research on donor motivations, giving potential, organizational capacity, and similar questions would build knowledge about planned giving to further refine approaches in the years ahead and bring elements of the strategy to greater scale.

Taken together, these components would provide LGBTQ organizations and communities with the tools, skills, financial resources, knowledge, momentum, and visibility to spark increased planned giving. Ultimately, it would provide the movement with sustained support that puts the future we all envision within reach.

We must build that future today—before our transformative window of opportunity narrows for good.

The best time to plant a tree
was 20 years ago.
The second best time is today.

Chinese proverb

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To learn more about the Task Force’s findings and recommendations, please contact Roger Doughty, President, Horizons Foundation.

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