

NATIONAL TASK FORCE ON LGBTQ PLANNED GIVING

PROJECT REPORT AND NATIONAL STRATEGY

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THE CHALLENGE OF FUNDING THE LGBTQ MOVEMENT

The LGBTQ movement has made extraordinary progress in just a few short decades. Remarkably, much of this progress has been driven by organizations operating on the proverbial shoestrings, working with an urgency laser-focused on near-term goals and challenges. That urgency led to many crucial successes, but also left little room for considering longer-term sustainability, growth, and investment.

To make continued progress on behalf of millions of LGBTQ people, strong and well-funded LGBTQ organizations are essential. They will remain essential far into the future—as has been underscored repeatedly in the past 18 months by resurgent violence, waves of anti-LGBTQ measures, and dramatic policy reversals at the federal level. But unless our movement—and LGBTQ communities around the country—can build the strength to address both the urgent needs of today *and* the uncertainties and opportunities that will arise tomorrow, our progress is at risk—as are the equality, dignity, and well-being of millions of LGBTQ people.

Where will the financial resources for LGBTQ advocacy and services come from in the years and decades ahead?

- **Government funding** can be volatile at best and rarely covers the full costs of programs. Moreover, many organizations—especially advocacy groups—seek little or no government funds.
- While certainly important, **foundation and corporate giving** represent comparatively small slices of the “pie” in American giving and often fund projects rather than provide general support.
- Indeed, the **vast majority of philanthropy** in America—80% in 2016¹—comes from individuals, through current gifts and bequests.²

Quite simply, individual giving is where the greatest potential lies for LGBTQ organizations.³ And **no greater promise exists than within the area of planned giving**—a major and potentially **transformative opportunity** to fuel LGBTQ organizations, empower LGBTQ donors to leave lasting legacies, support communities for generations to come, and create a movement that is built to last.

The LGBTQ movement must have a strategy to identify the financial resources required to win and safeguard our rights and meet the needs of LGBTQ people—both today and for decades to come.

¹ Giving USA Foundation. “Giving USA 2017.” Lilly Family School of Philanthropy, Indiana University Purdue University Indianapolis. June 2017.

² Among LGBTQ community centers and advocacy organizations, individual giving represents an under-utilized resource, on average comprising less than half of contributed revenue. Movement Advancement Project. “2017 National LGBT Movement Report.” December 2017, and “2016 LGBT Community Center Survey Report.” June 2016.

³ Through the LGBT Giving Project, a multi-year, multi-phase research and capacity-building initiative, a group of funders and leaders of LGBTQ organizations has commissioned research to study the most effective ways to motivate LGBTQ individuals to give to the movement. Select findings from this research are included throughout this strategy where they pertain to planned giving specifically. Additional information from the project is available at www.horizonsfoundation.org or upon request.

THE NATIONAL TASK FORCE ON LGBTQ PLANNED GIVING: CHARGE AND METHODOLOGY

Given the magnitude of the opportunity for planned giving (as discussed in the findings that follow) and the movement imperative for greater financial resources, a group of LGBTQ-focused funders and leaders of LGBTQ organizations came together to form the National Task Force on LGBTQ Planned Giving. The 15-member Task Force’s charge was to:

- Deepen knowledge about the status of LGBTQ planned giving
- Define the scope and nature of the opportunity in planned giving
- Develop a movement-wide planned giving strategy and implementation plan

The Task Force’s work was supported through a generous grant from the Arcus Foundation.

In late 2016, the Task Force retained the consulting firm Campbell & Company to help guide the process of developing this strategy. The Task Force and Campbell & Company undertook the following activities:

- **Reviewed existing literature and data** related to planned giving and giving among LGBTQ individuals
- **Surveyed 55 LGBTQ organizations**, exploring their existing planned giving efforts as well as their priorities and needs related to planned giving
- **Interviewed and held focus groups** with 26 LGBTQ organizations further exploring their successes and challenges in planned giving
- Interviewed representatives from **four other progressive and identity-focused planned giving efforts** to understand their successes and pitfalls
- Convened for three **in-person Task Force meetings** and conducted regular conference calls to review findings and develop this strategy

National Task Force Members

Richard Burns, Lead consultant
LGBT Giving Project

Stephen Chan, Vice President of Strategy and Operations
The Boston Foundation

Jerry Chasen, Director of Legacy Planning
SAGE

Cece Cox, Chief Executive Officer
Resource Center (Dallas)

Roger Doughty, President
Horizons Foundation (San Francisco)

Kris Hermanns, Chief Executive Officer
Pride Foundation (Seattle)

David Jobin, Executive Director
Our Fund (South Florida)

Chuck Loring, Partner
Loring, Sternberg, and Associates

Bill McDermott, Chief Development Officer
Los Angeles LGBT Center

Ben Francisco Maulbeck, President
Fundors for LGBTQ Issues

Clarence Patton, Founder and Director
The Pipeline Project

Thai Pham, Deputy Director of Development
Lambda Legal

Terry Stone, Chief Executive Officer (former)
CenterLink

Adam Swaim, Director of Planned Giving
(former)
Human Rights Campaign

Mohammad Zaidi, Director of Planned Giving
American Civil Liberties Union

PRINCIPAL FINDINGS

This work described above revealed and/or reinforced four principal findings:

- 1) Planned giving represents an **exceptional and unprecedented opportunity** for the LGBTQ movement
- 2) **LGBTQ people are open** to making planned gifts to LGBTQ causes
- 3) **Organizations are severely under-resourced** in planned giving and have limited capacity to take advantage of the opportunity it presents
- 4) For historically-specific reasons, **the greatest opportunity for growing LGBTQ planned giving is now**

Each finding is detailed in the sections that follow.

FINDING 1

PLANNED GIVING REPRESENTS AN UNPRECEDENTED OPPORTUNITY FOR THE LGBTQ MOVEMENT

The United States is in the midst of the largest inter-generational transfer of wealth in history. Nonprofit organizations that are well-positioned to attract estate gifts stand to raise stunning sums. Of the estimated \$59 trillion that experts expect to change hands upon asset owners' deaths between 2007 and 2061, an anticipated \$6.3 trillion could be directed to nonprofit organizations.⁴

Given this potential, it comes as no surprise that thousands of nonprofits—especially universities, hospitals, and major cultural institutions—are investing heavily in planned giving. In stark contrast, only a tiny number of LGBTQ organizations have made any such investments.

Many nonprofits are investing deeply in planned giving—because the pay-off will be dramatic.

Yet **LGBTQ nonprofits could easily benefit more than other nonprofits because LGBTQ individuals represent a uniquely promising subgroup of planned gift donors.** First, nearly two-thirds do not have children.⁵ This presents a spectacular planned giving opportunity, because as well-known planned giving researcher Russell James has noted, **not having a child is the single greatest demographic predictor** that an individual will make

⁴ Havens, John J. and Paul G. Schervish, "A Golden Age of Philanthropy Still Beckons: National Wealth Transfer and Potential for Philanthropy," Boston College Center on Wealth and Philanthropy, May 2014. *Note: The \$6.3 trillion estimate is based on a mid-range projection of 2% economic growth. The sidebars on the pages that follow demonstrate what that philanthropic potential could translate to for giving to LGBTQ causes.*

⁵ Gates, Gary, "LGBT Parenting in the United States," Williams Institute, February 2013.

a charitable planned gift. His research demonstrates that **those who have no children are nearly three times as likely to make a planned gift as those who do have children.**⁶

One additional time-specific factor makes the planned giving opportunity so tremendous. Many of the estimated 1.5 million LGBTQ individuals over 65 are deeply identified with the LGBTQ community. Their identities were formed in times of extreme discrimination and inequality, the horror of the AIDS crisis, and the great strides and watershed moments the movement has achieved.

In general, these members of the community—the **“Stonewall generations”**—share a powerful affinity and appreciation for the LGBTQ movement that no other generations are likely to experience with the same intensity.⁷ And because planned giving often represents the pinnacle of a long-term philanthropic relationship between a cause and a donor, these individuals with strong affinity for LGBTQ causes represent a highly and historically promising segment of potential planned givers.⁸

The immense scale of this opportunity

(Part 1)

Analysis by Horizons Foundation has revealed that, based on population data and residential real estate sales records, LGBTQ people living in the San Francisco Bay Area alone own more than an estimated \$40 billion in residential real estate. Just 3% of that wealth would total **\$1 billion for LGBTQ causes**—a potentially transformative sum that could support both regional and national movement organizations. The potential multiplies when all other assets beyond residential real estate are considered as well.

This potential is not limited to the high-priced Bay Area; residential real estate equity owned by LGBTQ people in many other metropolitan areas illustrates the substantial opportunity for estate-driven giving:

Chicago metro	\$6 billion
San Diego	\$6 billion
Denver	\$4 billion

Source: Horizons Foundation, “Today, Tomorrow, Forever: Ensuring the Financial Future of the LGBT Community,” February 2016. Other than the Bay Area, data are partial, although sufficient to make conservative estimates.

⁶ James, Russell N., “American Charitable Bequest Demographics (1992-2012),” Encourage Generosity, 2013. *Note: People with children, of course, can be highly philanthropic. At the same time, the data clearly indicate that not having children increases the probability of a charitable planned gift.*

⁷ The Task Force realizes that it is impossible to generalize about such large groups of people and that some in these age cohorts may *not* feel strongly identified for any number of reasons. Similarly, some of those younger than the Stonewall Generation have intense affinity for the LGBTQ movement. Even with such caveats, prior research by the LGBT Giving Project suggests the affinity among the Stonewall cohorts is real. For example, survey respondents over the age of 75 had the most strongly positive opinion of LGBTQ organizations of all age groups (62% “very favorable”), and those between 60 and 74 were the second most positive age cohort (55% “very favorable”).

⁸ As strong anecdotal evidence suggests, a large number of “Stonewall generation” LGBTQ people find that leaving part of their legacies to the community and movement in which they personally took part—and from which they benefited—is deeply meaningful. It is important to note that the “Stonewall Generation” aspect of this strategy is rooted in *both* the opportunity for the movement and the opportunity for individuals to leave personally significant legacies.

The immense scale of this opportunity

(Part 2)

Given the charitable giving opportunity presented by the generational wealth transfer, Horizons Foundation has analyzed the potential for the LGBTQ movement. Using conservative assumptions that LGBTQ people (a) are (only) as likely as others to leave a charitable bequest, and (b) make up 3% of the U.S. population, then:

- LGBTQ donors will leave **\$41.7 billion to charity in a 20-year period (\$200 billion over 50 years).**
- If only 1 in 5 of those charitable bequest dollars—20%—goes to LGBTQ causes, the total would exceed **\$8 billion for the movement over 20 years.**
- Over a longer 50-year timeframe, that number would climb to **\$40 billion** for the movement.

If time-limited factors such as the high portion of LGBTQ people with no children and the aging of the highly-identified Stonewall Generation result in LGBTQ planned givers indeed making more and larger gifts, the potential climbs much higher.

Source: Horizons Foundation, "Potential in LGBT Estate-Based Giving," February 2016. (Data derived from Schervish and Havens, A Golden Age of Philanthropy. Estimates assume a moderate 2.0% rate of economic growth. Additionally, the assumption that 1 in 5 charitable planned giving gifts would go to LGBTQ causes is conservative. Data from the LGBT Giving Project show that 60% of donors give 25% or more of their donations to LGBTQ causes, with 30% giving 50% to 100%.

FINDING 2

LGBTQ PEOPLE ARE OPEN TO MAKING PLANNED GIFTS TO LGBTQ CAUSES

The vastness of the LGBTQ movement's opportunity in planned giving is clear. But will LGBTQ people actually *make* planned gifts? Recent research strongly indicates that they will. In groundbreaking research conducted by the national LGBT Giving Project, 16% of LGBTQ donors to 56 local, state, and national organizations indicated that they had *already* committed to a planned gift to support an LGBTQ organization. An additional 35% said that

In a recent survey of more than 6,000 LGBTQ donors, 16% of donors said they had already committed to making an LGBTQ planned gift, and an additional 35% said they would be likely to do so.

they would be likely to do so.⁹ This represents a significantly larger proportion of the LGBTQ population than might be expected;¹⁰ on average only about 5% of Americans over 55 indicated that they had named a charitable organization as a beneficiary in a will or trust.¹¹

Additionally, the same survey revealed that 55% of respondents said that being LGBTQ has a “major impact” on their determinations about where to make financial donations, and 51% said it had a “major impact” on their thinking about their estate plans. This suggests that many LGBTQ individuals are already thinking about how they can leverage their current and potential planned giving to support LGBTQ causes.

What is especially remarkable is that these percentages of LGBTQ people in all of the findings noted above are so high *despite* the fact that, overall, there is little visibility, outreach, or marketing around LGBTQ planned gift opportunities. It may suggest that the potential for planned giving is even greater if this giving opportunity can be promoted more actively. Indeed, several organizations that *have* invested in building their planned giving capacity illustrate LGBTQ individuals’ willingness to give in this way—including a few national organizations regularly bringing in between \$2 million and \$4 million on average annually in planned gifts.

FINDING 3

ORGANIZATIONS ARE SEVERELY UNDER-RESOURCED IN PLANNED GIVING AND HAVE MINIMAL CAPACITY TO TAKE ADVANTAGE OF THE OPPORTUNITY IT PRESENTS

The opportunity to build stronger foundations for the future for LGBTQ causes is substantial and urgent, but how prepared are LGBTQ organizations to take advantage of this unique moment? What will it take to prepare organizations, and the movement more broadly, to transform an immense opportunity into generations of support and stability for LGBTQ communities and issues?

KEY INSIGHTS FROM ORGANIZATIONAL SURVEY

The Task Force’s survey of 55 organizations, along with interviews and focus groups, sheds some light on these questions, chiefly revealing that **most organizations have not yet invested significantly in establishing planned giving programs, almost uniformly** because they have concentrated fundraising on nearer-term priorities and present-day needs. **Being able to pay next month’s rent, or serve additional people in need, will always take priority for nonprofits.**

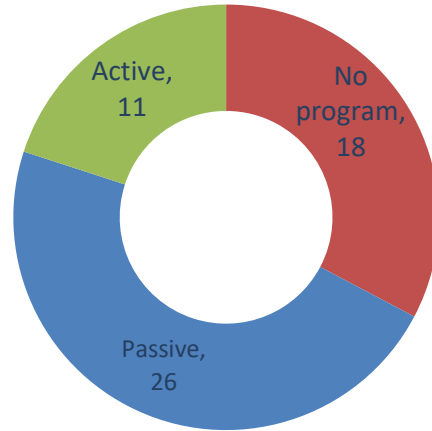
⁹ LGBT Giving Project survey research, 2013. This phase of research included a survey to donors who had given \$35 or more to at least one of 55 local, state, or national LGBTQ-focused organizations.

¹⁰ Individuals included in the LGBT Giving Project research represented “known donors” who had supported one or more LGBT organizations, making the sample a more philanthropically inclined group of individuals than the general U.S. population.

¹¹ James, 2013.

- The majority of organizations surveyed (80%) had **no planned giving program** or a **passive planned giving program**.
- Those with **no planned giving programs** had not received any planned gifts, had no fundamental elements of a program in place, and did not dedicate staff time to planned giving activity.
- **Passive programs** had seen marginal success (usually about one realized gift per year), had a few modest fundamentals in place (such as planned giving information on the organization’s website or mention of planned giving in a donor newsletter), and typically devoted almost no staff time..

Status of Planned Giving Programs (Survey Participants)



- Organizations with **active programs** had realized more planned gifts (average of six annually), had several fundamental program elements in place, actively promoted planned gifts among their donors, and dedicated an average 1 FTE to planned giving.
- Organizations with **active planned giving programs typically were larger, more sophisticated,** and often—though not always—national in scale. As shown in the table that follows, these organizations were able to leverage an often relatively modest investment in planned giving into significant returns, whereas organizations with passive programs realized much more modest returns in most cases.

SUMMARY OF ORGANIZATIONAL SURVEY RESULTS				
		NO PROGRAM	PASSIVE PROGRAM	ACTIVE PROGRAM
Total budget (avg)		\$920,000	\$2.4 million	\$22.3 million
Total contributed revenue (avg)		\$780,000	\$2.1 million	\$13.8 million
Total planned giving revenue (annual)	Low	--	\$0	\$25,000
	Median	--	\$27,000	\$1.1 million
	High	--	\$828,000	\$4.0 million
Percent of total budget from PG (avg)		--	5.3%	9.0%
Development expense budget (avg)		\$85,000	\$300,000	\$1.9 million
PG expense budget (avg)		--	\$10,000	\$78,500

- Those that rated their organization’s commitment to planned giving as low most often pointed

to staff having too many other demands on their time. Interview and focus group participants underscored these findings, noting that they are typically focusing on meeting near-term annual budgets and find it difficult to think about the longer time horizon of planned giving.

- At the same time, roughly half of the organizations that gave planned giving a low priority today said that their **organizations were likely or very likely to increase the commitment to planned giving** in the next one to three years.

Furthermore, most participants were interested in the idea of a movement-wide strategy that might provide foundational support to help them move their programs to the next level.

- When asked **what resources would be most beneficial to supporting planned giving** within their organizations, survey respondents most often said tangible tools and marketing materials, staff time, and assistance with planned giving prospect identification and engagement strategies. In interviews and focus groups, organizational representatives also noted that group training and technical assistance would be particularly useful.

Research has shown that investing in planned giving can *also* increase current giving—a fact important for both funders and nonprofit leaders. Russell James’s research, in fact, has shown that donors who commit to a planned gift subsequently increase their average annual gift by more than 75%.

Source: James, Russell, “Golden Nuggets from Ivory Towers: Recent Powerful Research Impacting Gift Planning,” October, 2014.

LESSONS FROM OTHER COMMUNITIES

Interviews with representatives of other progressive and/or identity-focused planned giving efforts—including Planned Parenthood, Jewish federations, the American Civil Liberties Union, and the Episcopal Church Foundation—uncovered the following keys to success:

- **Financial incentive programs** that powerfully motivate organizations to focus on pursuing planned giving by providing current dollar support in the form of matches or challenge rewards
- **Centralized resources** that provide as much “plug and play” capability for an organization as possible
- **Cohort or group training sessions** that provide opportunities for peers to learn together and hear from one another about successes and challenges
- **Technical assistance** or consulting for organizations on a more individualized basis to supplement broader-based trainings

These benchmarking findings—and the success organizations and movements have realized in executing planned giving strategies built around these strategies—figured prominently into two of the core components of this strategy: the resource warehouse (see Component #1 on page 14) and the pilot program (see Component #2 on page 17).

FINDING 4

FOR HISTORICALLY SPECIFIC REASONS, THE GREATEST OPPORTUNITY FOR GROWING LGBTQ PLANNED GIVING IS NOW

Each of the factors that make this moment one of historic possibility for LGBTQ planned giving *will not last*. In fact, these factors suggest that the movement has a window of exceptional opportunity for approximately the next 10 to 20 years:

- The wealth transfer is well underway, with peak years expected from 2031 through 2045.¹² That means that the prime years for donors to make their estate plans – generally done well before death – are the next 10 to 20 years.
- More than a thousand members of the Stonewall generation are passing away every day—often without any opportunity to leave an LGBTQ community-focused planned gift.
- LGBTQ individuals are increasingly raising children, a great step toward greater lived equality—but a demographic shift that diminishes the likelihood of future planned gifts.

With the peak of the generational wealth transfer approaching and the Stonewall generation aging, organizations must act quickly to build their capacity for securing planned gifts – *because donors are making their plans now.*

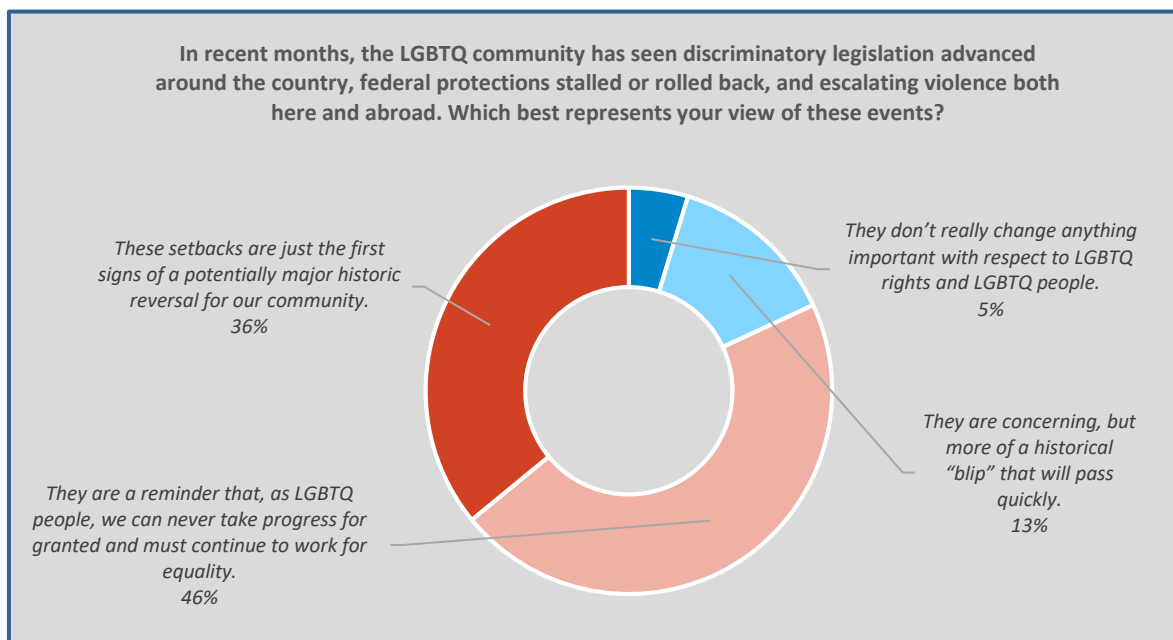
THE IMPACT OF THE TRUMP ERA

One significant additional historical factor has emerged in the past year: the wave of threats ushered in by the Trump administration. The sudden reversal of the LGBTQ movement’s fortunes under this administration has made clear to many—including some who not long ago believed that full equality lay just around the corner—that work for LGBTQ equality, dignity, and justice is far from finished. This powerfully reinforces the need to think about the movement’s long-term future—and the reality that none of us can predict what will come.

Findings from the national LGBT Giving Project illustrate this shift. In surveys conducted in spring 2017, LGBTQ individuals reported feeling less optimistic that the issues facing the community will be resolved in the next 20 to 30 years compared to a year ago. The portion agreeing that most LGBTQ concerns would be “largely solved” declined by 23%, while those *disagreeing* with the statement shot up by 48%.

¹² Accenture, “The Greater Wealth Transfer.” June 2012.

Along similar lines, **36% of LGBTQ individuals worry that recent setbacks and threats mark the beginning of a “major, historic reversal” in LGBTQ equality.** An additional 46% agree that they’re a reminder that LGBTQ people “cannot take rights or progress for granted.”¹³



The present historical moment, in short, provides LGBTQ people with a powerful reminder about the need to remain **vigilant and proactive** in the fight for LGBTQ equality, which creates a potentially powerful opening to talk with donors about the future of the movement—and planned gifts to help protect the community from the sort of reversals we’re witnessing today.

¹³ LGBT Giving Project “Silver Linings Fundraising,” (unpublished), 2017. This research through the LGBT Giving Project included surveys of donors to LGBTQ-focused nonprofit organizations as well as a nationally representative sample of LGBTQ-identified individuals. The surveys focused primarily on respondents’ attitudes and motivations following the 2016 presidential election.

A NATIONAL STRATEGY FOR LGBTQ PLANNED GIVING

Based on the context and findings above, the National Task Force on LGBTQ Planned Giving has developed this movement-wide planned giving strategy. In creating this strategy, the Task Force identified, analyzed, and considered a number of potential avenues to realize the LGBTQ movement’s planned giving opportunity.

The following is intended as a strategy for a five-year period. The opportunity in planned giving extends far beyond five years, but the Task Force believes that a five-year period will give time for concrete results and extensive learning about how planned giving as a movement-funding strategy can be taken to greater scale. The estimated cost for these five years is \$5 million.

VISION AND GOALS

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:

- **Spur greater planned giving** from LGBTQ individuals to LGBTQ causes, including initial identification of tens of millions of dollars in planned gifts to LGBTQ organizations from thousands of LGBTQ donors¹⁴ in the first five years, and substantially more beyond those first five years
- **Develop skills and capacity** within LGBTQ organizations to raise substantial funds through planned giving
- **Advance practical knowledge** about LGBTQ planned giving through strategically targeted research
- **Invest in under-resourced areas of the LGBTQ movement** to promote equity and ensure that organizations based in such communities are positioned to benefit from planned giving
- **Share lessons and knowledge** gained widely with funders and LGBTQ nonprofit organizations throughout the movement

With an estimated **\$5 million** budget and a goal of securing **tens of millions of dollars in new planned gift commitments over the next five years**, the strategy would realize substantial return on investment—and position the movement to **raise far more in the future** as organizations, donors, and advisors build on the momentum of the initial five-year period.

¹⁴ Although it is challenging to estimate what giving potential might exist over a five-year period without further donor-focused research, a conservative hypothetical might suggest that if the strategy successfully encourages 1,000 donors to make planned gift commitments, with an average value of \$30,000—in line with the national averages—the movement as a whole would receive \$30 million in planned gifts.

- **Develop, test, and replicate successful models** for increasing planned giving by LGBTQ people to LGBTQ causes more widely throughout the movement

CORE COMPONENTS

To accomplish these goals, the Task Force recommends a strategy that focuses on four complementary components, shown in the diagram below. Monitoring and evaluation to deepen existing knowledge and apply lessons to the field for strategic replication will underpin all of the core components. Descriptions of these core components follow, and further information on how they complement one another and support the vision are included in the PowerPoint appendix to this document.



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, building this groundswell of activity and unleashing the generosity of LGBTQ individuals would strengthen the movement with sustained support that serves as a strong foundation from which organizations can work for generations to come.

Additionally, given that research has shown that donors who commit to making a planned gift typically give more in their annual giving,¹⁵ a stronger emphasis on planned giving has the potential to substantively

¹⁵ Russell James' "Golden Nuggets from Ivory Towers" study in 2014 showed that donors who decided to make a charitable gift to an organization on average increased their annual giving by 75%. The 2007 "Bequest Donors: Demographics and Motivations of Potential and Actual Donors" study from the Lilly Family School of Philanthropy at Indiana University-Purdue University Indianapolis showed that donors who had included a charitable bequest in their wills gave more than twice as much in annual contributions than those who had made no such provision.

increase the current dollars available to organizations from individual donors. In addition to simply generating more resources, this would help organizations diversify their revenue sources and better leverage foundation and corporate support.

COMPONENT #1: RESOURCE WAREHOUSE

This online, centralized resource warehouse would provide templates, tools, samples, and training modules that organizations can leverage for their planned giving operations, making practical resources widely available to hundreds of LGBTQ organizations and avoiding significant duplication of effort among organizations.

GOALS

The primary goals for the resource warehouse include:

- Provide organizations at all levels of planned giving maturity/capacity with a **go-to source** for tools, materials, and trainings to support their programs
- Provide interactive features to **educate** LGBTQ organizations, guide **self-evaluation** and actions to be taken in response, and **foster collaboration** among organizations
- Offer select planned giving resources to **donors and advisors**, particularly through the national campaign (see Component #3, which describes a broad-based public fundraising and visibility “push” for planned giving in support of LGBTQ causes)

DYNAMIC CONTENT

The most significant component of the warehouse would be the resource library,¹⁶ a collection of templates, guides, links, and training presentations that users can access, download, and adapt for their own use. The table that follows illustrates a potential inventory of these resources based on best practices, interviews with “benchmarking” organizations¹⁷, and results from the organizational survey. The final library would be determined in collaboration with pilot program participants (see Strategy #2 for pilot program description), with participants weighing in on the inventory and providing input on drafts. The intention would be to continue to refine and add to the library over time.

Numerous templates and models exist both among LGBTQ organizations with active planned giving programs and in the world of planned giving beyond the LGBTQ community itself. Accordingly, creation of content would be accomplished through:

- **Collection and adaptation** of existing tools—from sources such as the *Chronicle of Philanthropy*,

¹⁶ The Task Force reviewed samples of similar sites that have proven useful specifically for planned giving (Episcopal Church Foundation) and for the LGBTQ movement (CenterLink).

¹⁷ Benchmarking organizations contributing to the Task Force’s work included Planned Parenthood Federation of America, several organizations affiliated with Jewish federation Life & Legacy planned giving initiatives, the American Civil Liberties Union, and the Episcopal Church Foundation.

LGBTQ organizations with sophisticated programs, pilot project and Task Force members, counsel, and benchmarking organizations willing to share their materials

- **Development of new resources** where applicable templates and samples do not already exist or the specifics of planned giving fundraising within LGBTQ communities requires more tailored materials

Templates and Tools	How-to Guides and Training Sessions	Other Resources
<ul style="list-style-type: none"> • Gift acceptance and gift counting policies • Models of marketing plans for differently scaled nonprofits • Calendar of planned giving activity • Legacy society framework • Sample case/marketing appeals, including stories and testimonials 	<ul style="list-style-type: none"> • Making the case for planned giving internally • Glossary of planned giving vehicles and terms • Integrating planned giving into a campaign • Working with estate planning and tax advisors • Working with a community foundation • Marketing planned giving 	<ul style="list-style-type: none"> • Local planned giving council directory • Association of Fundraising Professionals chapters • Links to other resources

RESOURCE WAREHOUSE STRUCTURE AND USAGE

The site would provide practical information and tools to LGBTQ organizations at all stages of preparedness for active planned giving. There would be, for example, tailored resources for organizations that have never undertaken planned giving, those that have more “passive” programs, and those with active programs. Upon first arriving at the website, a new user would be asked to register and complete a self-assessment questionnaire, which would ascertain the organization’s level of experience. The user would then be directed to specific tools or training modules that might be most beneficial; for example, if the user answers that their organization does not currently have a legacy society, the site would point the user to information about creating one.

Depending upon resources, additional functionality could include elements such as:

- **Goal-setting:** Users could have the option to set organization-specific goals, access the tools and trainings they’ll need to accomplish those goals, and have a system of built-in reminders that will

help keep the organization on track to meet its goals.¹⁸

- *Links to other organizations*: User organizations could join email lists/listservs that would connect them with other nonprofits pursuing planned giving, offering opportunities for networking and collective learning.
- *“Ask an expert”*: An additional offering could enable users to post questions—either through a listserv or message board—to which a retained expert would post a response.

The site would be actively maintained with regular content updates. It would also be continuously improved based on regular user feedback and recommendations.

DRIVING TRAFFIC

Even the best web-based resource won’t have any impact unless visitors use it and return to it.

Accordingly, a full launch plan would be an integral part of developing the warehouse. The Task Force has identified a number of specific strategies that would significantly increase utilization. For example, the warehouse could be debuted with a national web demonstration to directors of development and other staff. It could be visibly promoted through key LGBTQ conferences (such as Creating Change, Funding Forward, CenterLink, and Equality Federation) as well as by key influencers, such as individual movement leaders, major funders, and national networks such as CenterLink. Within specific communities, LGBTQ funds and community foundations could help promote the warehouse, providing valuable tools to grantees and others in the community.

Finally, while the primary audience for the resource warehouse will be LGBTQ organizations, the site could also include a public (non-password-protected) landing page for potential donors and their financial advisors and estate planning attorneys. At the outset, this information may be minimal, but once the national campaign (described below) is underway, this page would become the public website for the campaign, providing additional information about the national planned giving effort, a “case for support” for making planned gifts to LGBTQ causes, and resources that donors and advisors can use to connect to organizations and establish planned gifts.

Planned Giving On Demand: The Episcopal Church Foundation’s Resource Site

Supporting congregations, schools, and other organizations in advancing planned giving, the Episcopal Church Foundation created a resource through episcopalfoundation.org that includes free, open-access tools such as:

- Adaptable templates and samples, from simple bulletin inserts to fully designed brochures
- Descriptions of types of planned gifts and gift income illustrations for donors
- More than a dozen webinars on planned giving topics

In addition, ECF offers “Planned Giving on Demand,” a more comprehensive guide to establishing or advancing a planned giving program.

¹⁸ This would require that the site be password-protected to enable goal tracking. This functionality would also provide the opportunity to capture data that could be used to research organizations’ progress.

COMPONENT #2: PILOT PROJECTS

A set of carefully designed multi-year pilot projects would provide real-world opportunities to help carefully select organizations raise revenue through planned gifts; to seed local momentum and visibility for planned giving among donors and advisors; and to test and develop means, models, and messages to maximize return on investment in planned giving at a greater scale in future years. Each pilot would consist of a small cohort of LGBTQ organizations brought together and supported in developing their planned giving programs through multiple mechanisms, described below.

GOALS

The primary goals of a set of pilot projects would be:

- Help selected organizations **advance their planned giving programs** through group training, technical assistance, access to resources, and collective knowledge sharing
- Build knowledge for the field by **experimenting with different financial incentive and partnership models** to enable the movement to apply successful models to other defined communities and groups to **bring the program to scale**
- Provide avenues for more **in-depth research** among donors to develop greater shared understanding of the most effective means to raise planned gifts from LGBTQ people for LGBTQ causes
- Raise the profile of planned giving among donors within defined communities to **generate significant philanthropic support** within these regions

CREATION OF PILOT PROJECTS AND SELECTION OF PARTICIPANTS

The Task Force concluded that these goals could be most effectively accomplished through **a nationally coordinated program with five pilot projects**.¹⁹ This approach is informed in significant part by the recent experience of the national LGBT Giving Project, which successfully supported such intensive, capacity-building project cohorts with groups of LGBTQ community centers and state equality organizations.

The Task Force anticipates that four of these would be centered on strategically selected geographical regions, and one would consist of LGBTQ community centers from around the country. The multiple simultaneous sites would be critical to developing as much experience and knowledge from a diverse array of models as quickly as possible to capitalize on the 10—20-year window of opportunity for planned giving described in the “Findings” above.

The regions included in the program would be determined by the committee overseeing the movement-wide strategy (see Strategy Oversight and Evaluation section below for a description of this committee’s role), based on criteria like those described in the sidebar on the following page.

¹⁹ Depending on funding levels, it would be possible to carry out these pilots projects with as few as three or four cohorts.

Each pilot would include five to seven organizational participants, with a primary focus on those that have **passive planned giving programs** as well as those based in communities that have been **historically underserved** (such as organizations serving and/or led by transgender people and/or people of color).

Within each region (and for a project with community centers), organizational participants would be selected based on an RFP application process with a recommended information session prior to application submissions. This would help ensure that organizations taking part have a demonstrated interest in and commitment to the program. All participating organizations would need to be carefully assessed to ensure that they have strong board and staff buy-in and have sufficient capacity to launch an active planned giving program.

LEAD PARTNERS

Each pilot would include a strong lead partner to help shepherd the program locally, though the specific role for the partner may differ project among the pilots. The Task Force recommends experimenting with three potential partner types—community foundations, local/regional LGBTQ funds, and LGBTQ community centers—to determine the advantages and drawbacks of each for future replication. A description of the role and selection criteria for these different models is shown on the page that follows.

Regional selection criteria

Although final criteria would be developed by the committee overseeing the strategy, potential factors for selecting the regions to be represented in the pilot program could include:

- Geographic diversity
- Critical mass of organizations that have passive planned giving programs and interest in advancing their programs
- Strong potential lead partner willing to play a leadership role
- Existence of potential participants that serve diverse parts of the LGBTQ community
- Presence of a sizable LGBTQ population with donor giving capacity
- Possibilities for raising money locally to support the local work (such as from local funders)

Note: Not all regions will necessarily meet all criteria.

Community Foundation or LGBTQ Fund		LGBTQ Community Center	
Role Description	Selection Criteria	Role Description	Selection Criteria
<ul style="list-style-type: none"> ▪ Providing project management and coordination ▪ Serving as a trainer for group sessions ▪ Conducting and/or overseeing delivery of technical assistance ▪ Assisting with participant recruitment and selection, drawing on local networks and relationships ▪ Fundraising to secure local-level support for the project (or potentially committing own financial resources) ▪ Potentially managing assets for some participating organizations 	<ul style="list-style-type: none"> ▪ Track record of engagement with LGBTQ community and cultural competency ▪ Record of playing a convening role previously ▪ Experience and expertise in planned giving ▪ Existing relationships with some of the likely participants ▪ Ability to commit resources to the project (particularly staff time, possibly financial resources) 	<ul style="list-style-type: none"> ▪ Providing project management and coordination ▪ Coordinating delivery of training and technical assistance and participating in delivery of these services where appropriate ▪ Assisting with participant recruitment, drawing on local networks and relationships ▪ Providing facilities/meeting space for group trainings ▪ Fundraising to secure local-level support for the project (desirable but not required) 	<ul style="list-style-type: none"> ▪ Strong credibility and network within the LGBTQ community ▪ Ability to set aside sense of competition for donor funds with potential participants ▪ Record of playing a convening role previously ▪ Ability to commit resources (staff time and physical meeting space), likely requiring a larger, well-resourced center ▪ At least some planned giving experience

KEY PILOT PROGRAM ELEMENTS

Baseline requirements

Participants in the pilot projects would need to ensure commitment across the organization by involving their executive directors, development staff, and key board members in the program, to help mitigate challenges due to staff and board turnover or lack of buy-in at leadership levels.²⁰ Shortly after the launch of each pilot, the Task Force recommends involving each organization’s full board in an informational session to explain the program, make the case for planned giving, and educate board members on planned giving basics, again helping to build buy-in and leadership commitment.

To gauge progress and incentivize proactive engagement, participants will undertake—with the support of outside expertise and/or involvement of the lead partner:

- An organizational assessment of planned giving operations at the outset of the program to set a baseline of activity and results
- Individual organizational goal-setting (e.g., number of members of a legacy society; known value of future gifts; number of asks made)
- Annual progress reviews

Financial incentive programs

Several planned giving programs at both national and local levels have shown impressive returns on investment by offering incentives to both participating nonprofits and donors. The essential principle is that organizations taking part in the program will be rewarded with financial incentives based on activity and progress. Among notable examples that the Task Force identified were the American Civil Liberties Union, Planned Parenthood, and a national program created by the Grinspoon Foundation (see sidebar).

These financial incentives inspire donors because their commitment to a planned gift triggers immediate support for an organization they care about. Even more importantly, the incentives encourage organizations themselves to dedicate time and effort to planned giving because current dollars are also at stake.

Grinspoon Foundation’s Life and Legacy Program

Five years ago, the Harold Grinspoon Foundation began a focused effort to strengthen Jewish synagogues and community agencies by building their planned giving programs. Alongside training and resources, organizations receive incentive grants for attaining specific goals in new gift intentions. With investments in 43 communities around the country, the Life and Legacy program has already realized the following success:

- **465 organizations involved**
- **\$500 million in new gift expectancies**
- **15,721 planned gift donors**
- **\$54 million in planned gifts realized**

Chronicle of Philanthropy, Sept. 13, 2017

²⁰ The recently completed LGBT Giving Project’s cohort-based research project uncovered challenges related to turnover and lack of board engagement that impeded some organizations’ abilities to continue the momentum of the project. Thus, the Task Force recommends both an application process that demonstrates commitment at leadership levels as well as early and active engagement of key staff and board leaders.

Incentive programs run by the ACLU and Planned Parenthood have been highly successful, securing hundreds of millions of dollars in documented bequests and spawning repeat matching challenge programs. In a prior campaign, the ACLU leveraged a \$6 million donor challenge to secure \$217 million in new planned gift commitments. Planned Parenthood’s recent bequest challenge brought together three donors contributing \$20 million to match newly confirmed planned gifts, leading to more than \$325 million in new commitments.

Based on research conducted for the Task Force, we recommend experimenting with two primary models of incentives—with amounts to be adjusted based on available funding:

- A matching gift pool for all newly confirmed planned gift commitments, matching 5 to 10% of the confirmed amounts of new commitments, up to \$5,000 for any single match (e.g., a \$100,000 planned gift commitment would yield a \$5,000 immediate grant to the organization)
- Annual grants of \$10,000--\$20,000 awarded directly to participating nonprofits based on meeting or exceeding the goals established for the year

It is important to note that roughly 40% of the estimated \$5 million, five-year implementation budget for the overall strategy would go toward financial incentives for pilot program participants. Funding this important element of the pilot programs at this level would mean that a substantial portion of the investment in this strategy results in current dollars to support organizations in the near term, not just longer-term investments that will pay off once future gifts are realized.

Trainings

The core of the program would include group trainings, knowledge sharing, and individualized technical assistance to advance organizations’ planned giving knowledge and skills. In-person “intensives” would include technical training, presentations from participants, group discussions of challenges and successes in planned giving, and prospect strategy sessions, including where there might be overlap in prospects among organizations. Sessions could also include discussions with estate and financial planning advisors to help organizations understand how to build relationships with these key partners.

Depending on available resources, organizations would also receive individualized technical assistance to help them put the training and tools they’ve received into practice and troubleshoot specific challenges as they arise. Provision of the training and technical assistance would be coordinated and run either by the lead partner or contracted out to qualified experts.

Pilot Program: Relationship to other components of the strategy

Participant organizations in the pilot projects would play important roles in other elements of the national strategy as well. For example:

- Resource warehouse: Pilot participants could help advise and provide feedback on materials for the resource warehouse, as well as deploy these tools throughout planned giving activities
- National campaign (see below): Concepts and messaging for the national campaign could be tested through pilot participants, including focus groups, interviews or surveys
- Research (see below): Participation in this donor outreach as well as wealth screening will also support research efforts to better understand LGBTQ donors’ interests and capacity

Additional elements

In addition to the training and technical assistance, the Task Force recommends investing in wealth screening/modeling research for all participants. Employing this now-common fundraising tool would help the organizations identify and prioritize planned giving prospects and, collectively, would further quantify the planned giving potential in the LGBTQ community.

EVALUATION AND TAKING TO SCALE

Following the five-year initial period envisioned in this strategy, the Task Force expects that work undertaken in the pilot projects would endure among those organizations and communities involved. Assuming that the pilots have been successful, there are likely to be far greater opportunities to raise local funding for continued planned giving activities and the incentive programs.

The ultimate impact of the pilots, however, is intended to be much broader. The pilots are designed to be a “proof of concept”; if the results among the original pilot project cohorts are strong and the return on investment is clear, the Task Force envisions replication in other geographic locations and/or among identified national sub-groups of organizations.

Therefore, evaluation of the pilot projects’ successes and challenges, as well as the various models piloted through each project, will be essential in refining and replicating the model(s) in the future. The pilots will ideally be able to show the impact of the investments made, lead to a highly refined set of tools and training for other cohorts, and build momentum for expansion into other regions.

COMPONENT #3: NATIONAL CAMPAIGN

All efforts to develop planned giving depend not only on the capacity of LGBTQ organizations but also on awareness among potential donors about opportunities for leaving their own legacies. To promote that awareness, the Task Force recommends a national LGBTQ planned giving campaign.

GOALS

The national campaign would be guided by the following primary goals:

- Raise **awareness** among prospective LGBTQ planned giving donors
- Maximize planned giving opportunities to the movement and secure **substantial planned gifts** for LGBTQ organizations
- Leverage the **visibility of the 50th anniversary of Stonewall** to promote planned giving among LGBTQ donors, organizations, and advisors nationally
- Leverage the momentum of the **pilot projects** and build awareness of the **resource warehouse** to inspire (and equip) many more LGBTQ organizations to build the infrastructure and expertise needed to raise more planned gifts

TIMING AND AUDIENCES

As the country approaches the landmark 50th anniversary of the Stonewall uprising, there is a strong logic to leveraging that watershed moment to provide for the future of the movement. The Task Force recommends preparing for the national campaign during the spring and summer of 2019 and launching with a public push for planned gift commitments toward the end of 2019, enabling the campaign to build off of the energy of other anniversary activities in the summer—without competing with those efforts directly.

The campaign would be a nationally branded and promoted effort that aims to benefit LGBTQ causes around the country by encouraging donors to make planned gift commitments to organizations and LGBTQ funds. Key audiences for the campaign would include:

LGBTQ donors

- Encouraged to honor our past and shape our future by making a planned gift to support LGBTQ causes

LGBTQ organizations, LGBTQ funds, and allied community foundations

- Encouraged to talk to donors proactively about supporting their missions and their communities for the long term through planned giving

LGBTQ and allied advisors

- Encouraged to talk with LGBTQ clients about leaving a legacy for the LGBTQ community

BASIC ELEMENTS OF CAMPAIGN DEVELOPMENT

Preparations for the campaign would likely include:

- Seeking **co-branding sponsorship** for the campaign through a financial or professional services firm interested in reaching LGBTQ audiences
- **Branding** the campaign and developing **messaging** and materials, including testing concepts²¹ through pilot participants’ donor bases as well as broader polling and/or social media testing
- Determining the **advertising and media strategies** for the campaign based on available budget, in-kind resources, and/or partnerships
- Recruiting a **celebrity spokesperson** to build the campaign’s visibility
- Exploring the benefits of establishing a **legacy giving day**, similar to GiveOUT Day, to build momentum across the movement
- Promoting the public-facing page of the **resource warehouse** to donors and advisors
- Enlisting a core group of **early donor champions** to the effort to show momentum and spread

²¹ Testing would include exploring which terminology about “planned giving” best resonates with donors and prospects.

the word

- Leveraging **pilot project** participants as early advocates and adopters, equipped with the tools and knowledge to reach donors
- Determining the most seamless way to **track the number and value of new commitments** across the movement, including potentially through organizations and advisors

A nationwide campaign effort to raise visibility and awareness about planned giving among LGBTQ individuals will support organizations across the movement in their efforts to advance planned giving.

COMPONENT #4: ONGOING RESEARCH

The Task Force believes that sufficient research and analysis has been done to conclude that the LGBTQ movement has a tremendous opportunity in planned giving, and to point toward effective strategies for realizing this opportunity. Carefully targeted additional research would yield greater insights that would increase the success of LGBTQ planned giving efforts of all kinds both during the five-year project period and in the years beyond.

GOALS

Principal goals for research could be tightly focus on:

- Determining the most effective ways to present planned giving to **potential donors** (messaging and vehicles) based on a deepened understanding of donor behaviors, motivations, and philanthropic potential
- Continuing to deepen our understanding of what **LGBTQ organizations** need to pursue planned giving effectively and efficiently

CORE RESEARCH QUESTIONS

Core research questions to explore would likely include ones related to donors, LGBTQ organizations, and planned giving strategy, such as:

<i>Donor-focused questions</i>	How can LGBTQ people be motivated to include LGBTQ nonprofits in their estate plans?
	What motivates donors to make these commitments (including messages, attitudes, matching programs, influencers/peer pressure, etc.)?
	What deters them or keeps those open to making planned gifts from actually doing so?
	How do motivations differ across demographic groups, such as by age, gender/gender identity, race, and geography?
	What role can financial and estate planning advisors play in encouraging giving to the LGBTQ movement among clients?

<i>Organization-focused questions</i>	What are the most effective and efficient ways to develop planned giving capacities in LGBTQ nonprofits?
	What are the most common and/or serious barriers to investing in planned giving?
	What kinds of LGBTQ nonprofits are best positioned to make the case for planned giving, including LGBTQ funds and community foundations with a focus on the LGBTQ community?
<i>Overall strategy questions</i>	Are there ways to estimate the total potential in LGBTQ planned giving?
	What can be learned from planned giving efforts in other progressive and/or identity-focused movements?

A significant part of the research can be accomplished by leveraging other elements of the national strategy. Tracking self-assessment results from users of the resource warehouse, for example, would give insights into where nonprofits struggle with implementing planned giving strategies. Similarly, the pilot projects would provide opportunities to test campaign concepts and messaging with donors and advisors.

Additionally, research can and should build off of findings from prior work, including the LGBT Giving Project, to further explore areas of opportunity and questions raised through that work. For example, in researching which types of individuals make the strongest planned giving prospects, responses to the LGBT Giving Project survey indicated that those who had already committed or were likely to make a planned gift were older and wealthier than those who had not made a gift and/or were less likely to. Additionally, the data from the survey provides important insights into donor motivations, potential planned giving obstacles, and effective messaging for planned giving, all of which should be considered as a foundation for further research.

To the extent that funding can be identified, it would almost certainly be beneficial to commission highly focused, strategic research into donor motivations and basic messaging. Drawing on learnings from the work of the LGBT Giving Project, it is unlikely that research would uncover the proverbial “magic bullet” of messaging. At the same time, enormously valuable insights can be gained that can be shared with and tested by LGBTQ groups participating in the pilot projects as well as other LGBTQ nonprofits around the country. There are numerous options for partnering in research work with philanthropic and marketing experts, including the Lilly Family School of Philanthropy, Giving USA, the Giving Institute, MarketSmart, Community Marketing, Inc., and Cygnus.

STRATEGY OVERSIGHT AND EVALUATION

The two sections that follow describe the suggested structure for managing implementation of the national strategy over the five-year period as well as considerations regarding monitoring and evaluating progress, with the objective of bringing elements of the strategy to a greater scale.

ROLE OF NATIONAL LEAD ENTITY

Successful implementation of the strategy will require a lead entity to direct and oversee the project. The Task Force envisions this entity would be supported by a carefully selected advisory group, likely to include national philanthropic and movement leaders. Discussions are underway to determine the most appropriate oversight structure and project lead(s). Listed below are key responsibilities for the leader(s) of this effort:

- 1) Serve as the central agent for managing the components of the strategy and coordinating organizations and individuals involved in each
 - a. Approximately five-year commitment
 - b. Would include project management (% FTE to be determined)
 - c. Function as fiscal agent
- 2) Lead fundraising and partner outreach efforts to support the strategy (in partnership with advisory group members)
- 3) Manage vendor relationships and contracts
- 4) Manage matching/challenge gift incentive programs for pilot projects
- 5) Develop, host, and maintain the resource warehouse
- 6) Oversee development and implementation of national awareness campaign
- 7) Monitor and evaluate strategies and suggest revisions as needed

Some of these responsibilities would be accomplished through vendors and consultants – all managed by the lead entity.

EVALUATION

The monitoring and evaluation role for the national lead entity(ies) and advisory group would be continuous through the five-year period. These would be especially important to ensure that the strategy provides pathways for replicating success. Funds would be specifically allocated for evaluation of each component of the overall strategy. If early evaluations of progress reveal a need to rethink an aspect of the strategy, the national lead entity(ies) would be empowered to make necessary course corrections to ensure that overall project outcomes are achieved. A few examples of key evaluation questions include:

- What models for incentivizing planned gifts to LGBTQ organizations yield the most benefit for the most efficient cost?
- What aspects of the central resource warehouse envisioned are most useful to LGBTQ nonprofits? Least useful?

- What factors lead to success on the part of LGBTQ nonprofits in garnering planned gifts?
- What kinds of technical assistance prove most effective in helping nonprofits to develop and sustain significant planned giving?

Results of evaluations would be shared widely across the movement and among funders.

Monitoring and evaluation will be especially important to ensure that the strategy provides pathways for replicating success, applying lessons to the field as broadly as possible, and bringing the strategy to scale. Key evaluative aspects are noted below.

Resource Warehouse	Pilot Programs	National Campaign
<ul style="list-style-type: none"> •Website traffic and return use data •User progress based on self-assessments and/or goals •Traction of interactive features such as message boards or email lists •Data on most popular/requested resources 	<ul style="list-style-type: none"> •Planned giving success of participating organizations (ROI, \$ and # of gifts, self-assessment details) •Effectiveness of training and technical assistance •Impact of various financial incentive models •Impact of various lead partnership models 	<ul style="list-style-type: none"> •Planned giving success (ROI, \$ and # of gifts) •Participation among organizations, donors, and advisors •Sponsorships or other significant campaign partnerships

IMPLEMENTATION RESOURCES

A suggested timeline and preliminary budget are provided in the appendices to this document.

CONCLUSION

Taken together, the components that make up this national strategy have great potential to spark increased planned giving and provide sustained support for a strong, proactive, and vigilant movement equipped to work for equality, dignity, and justice for LGBTQ people well into the future.

We must build that future today – before this singular opportunity disappears.

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

Chinese proverb

APPENDIX A: TASK FORCE MEMBERSHIP

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CenterLink

Adam Swaim
Director of Planned Giving (former)
Human Rights Campaign

Mohammad Zaidi
Director of Planned Giving
American Civil Liberties Union

In addition, the Task Force wishes to thank the many organizations that completed the project survey and contributed insight into the research through interviews and focus groups.

APPENDIX B: SUGGESTED TIMELINES

Component	Year 1	Year 2	Years 3-4	Year 5
Resource warehouse	Design and development	Launch, promotion, and maintenance	Promotion and maintenance	Promotion and maintenance
Pilot programs	Cohort and location selection and lead partner preparation	Participant selection, training, and fundraising	Participant training and fundraising	Potential expansion to new regions
National campaign	Preparation	Launch and promotion	Closeout or continue as funding and results warrant	
Research	Targeted donor research	Targeted donor research (as needed)	Targeted donor research (as needed)	Finalization of any remaining research
Project management	Identification of overall project lead entity Preparation and fundraising for all aspects of strategy	Project management and evaluation	Project management and evaluation	Project management, closeout, and evaluation

Component 1: Warehouse timeline



Component 2: Pilot project timeline



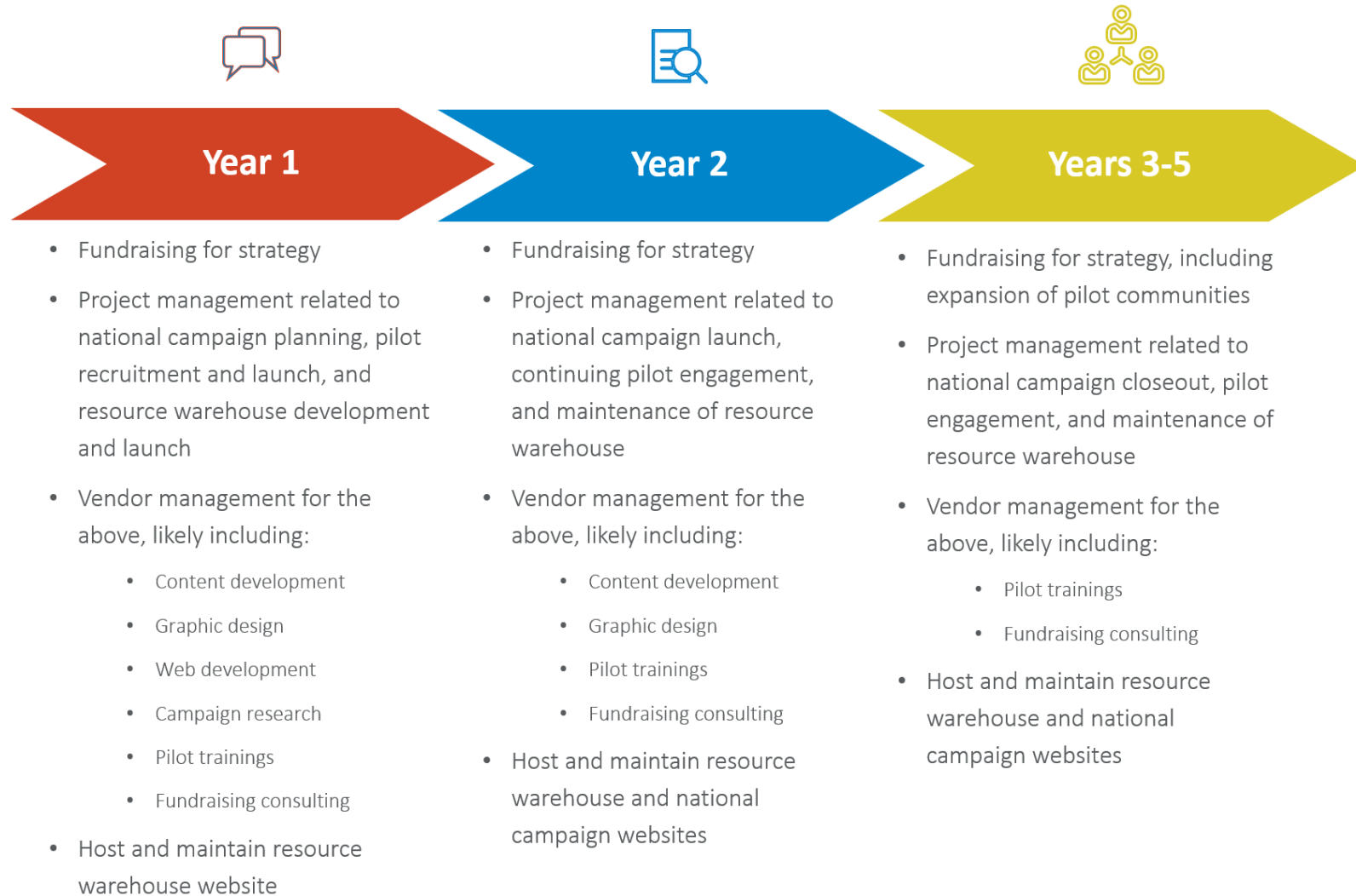
Component 3: National campaign timeline



Component 4: Research timeline



Timeline for lead entity



APPENDIX C: ESTIMATED BUDGET

The estimated budget below reflects high-level anticipated expenses for the implementation of the strategy and is intended as a starting point for planning; many elements can be scaled according to available resources. The budget totals \$5 million, which breaks down into nearly \$3 million in baseline costs and just over \$2 million in financial incentives for pilot participants.

Component	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Project management	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000	\$1,000,000
Resource warehouse (design, coding, content creation, hosting)	\$60,000	\$15,000	\$15,000	\$15,000	\$15,000	\$120,000
Pilot program (5-7 projects, recruiting, training, technical assistance, wealth screening, meeting/convenings, etc.)	\$200,000	\$200,000	\$200,000	\$200,000	<i>dependent upon scale of expansion</i>	\$800,000
Financial incentives for pilot participants (assumes 5 groups with 7 participants each over 3 years)		\$700,000	\$700,000	\$700,000	<i>dependent upon scale of expansion</i>	\$2,100,000
Campaign (concept testing, materials/branding, promotion, events)	\$120,000	\$150,000	\$500,000	<i>(dependent on scale and partnerships)</i>		\$770,000
Research (commissioned beyond work described above)	\$50,000	\$10,000				\$60,000
Evaluation	\$25,000	\$25,000	\$25,000	\$25,000	\$50,000	\$150,000
Total	\$655,000	\$1,130,000	\$1,640,000	\$1,140,000	\$265,000	\$5,000,000