



LGBTQ+ Donors: Data & Stories of LGBTQ Fundraising from Planned Gifts

Creating Change 2026: Unstoppable

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- Standard 16: *The nonprofit has a donor-centric culture that meets the needs of each donor.*



LGBTQ+ DONORS EXPAND THE PIPELINE



Today's Desired Outcomes – to help you raise more funds from LGBTQ+ donors

- Case examples
- Practical support & approaches to replicate, tailor, and modify
- Resources and research (cite + read later)

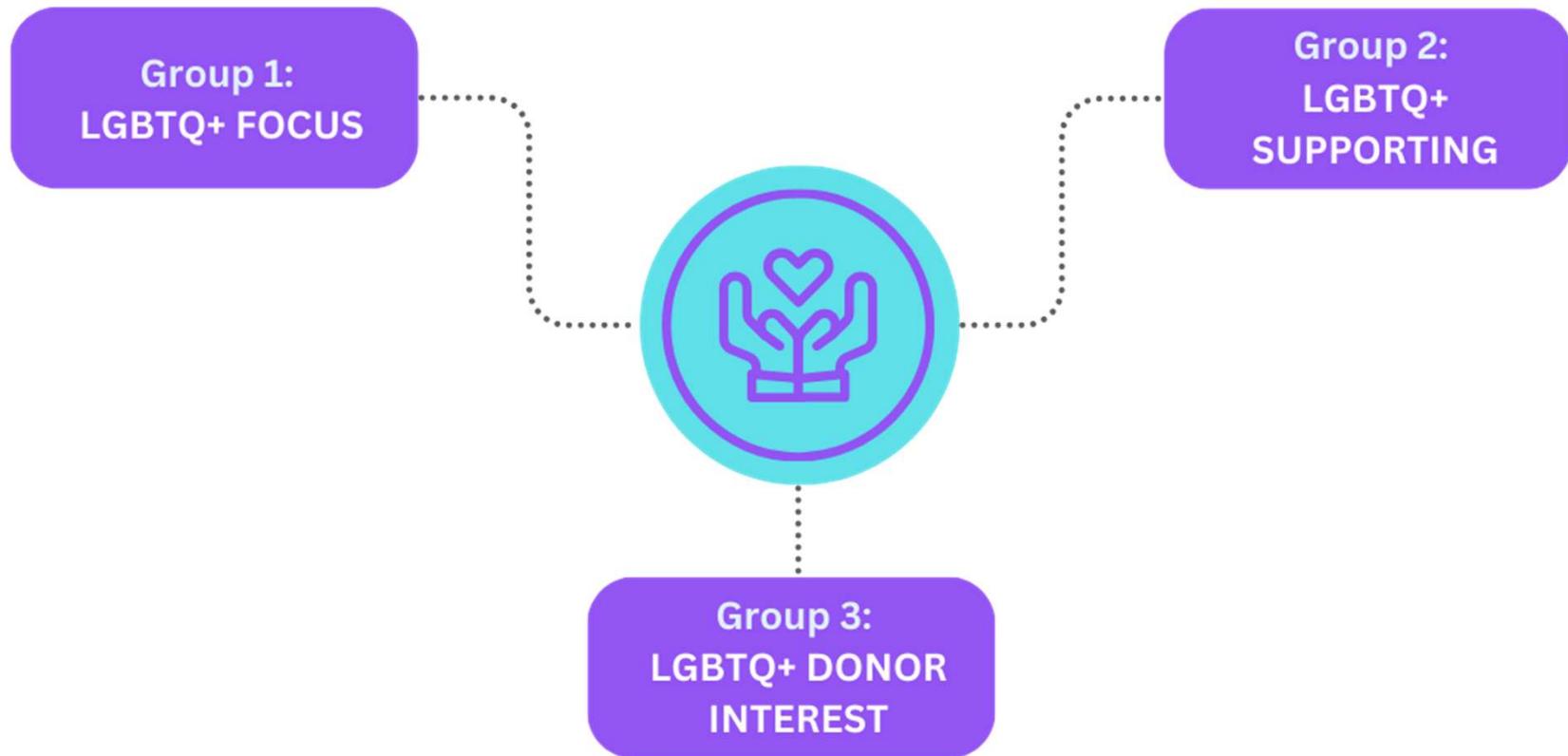
(R) Atlanta-based Black gay philanthropist, Norris Bumstead Herndon, Jr.



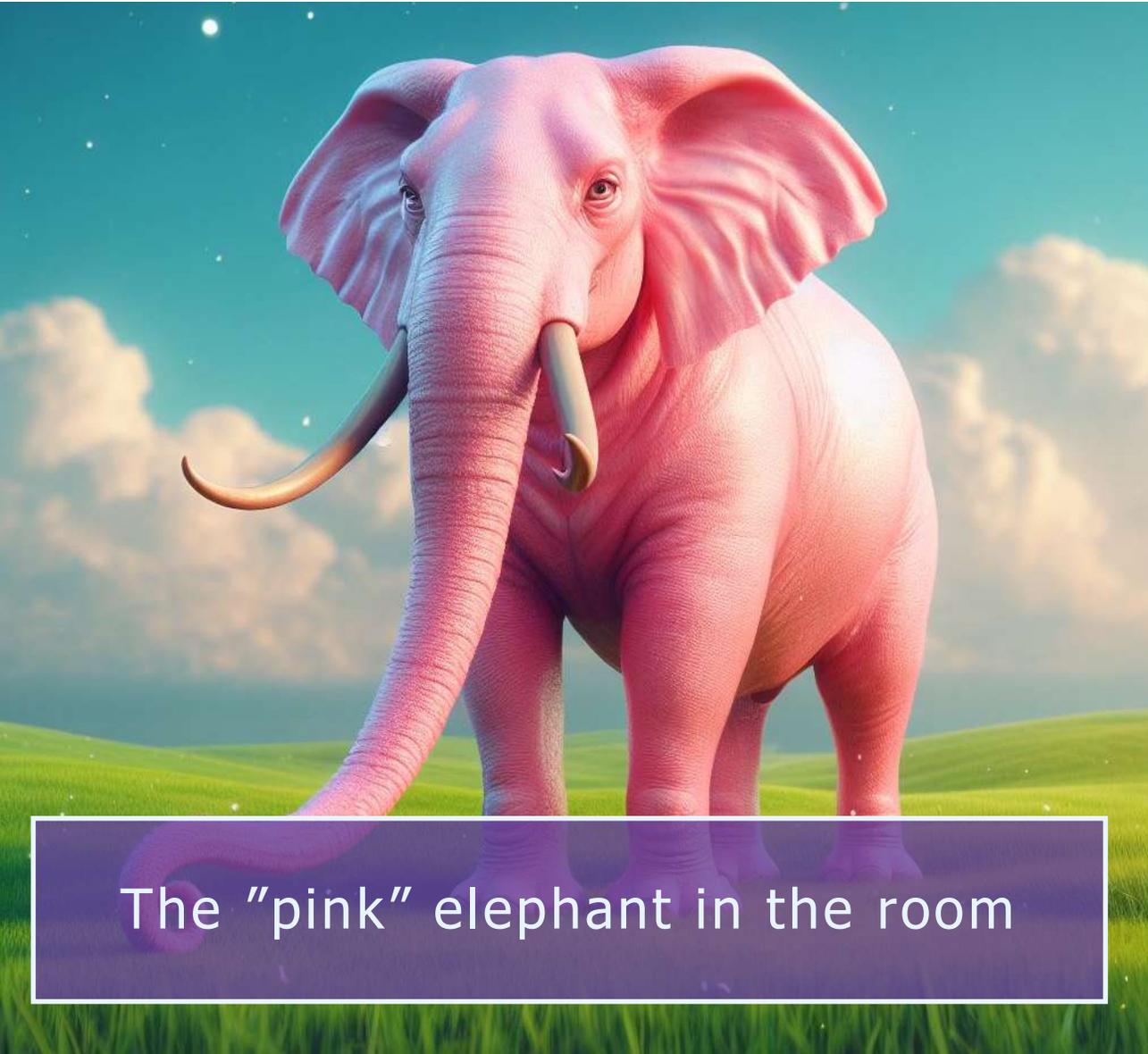
ROOTS OF PRESENT FINDINGS:

HORIZONS FOUNDATION
WELLSPRING PHILANTHROPIC FUND
OUTGIVERS – GILL FOUNDATION
THE WILLPOWER PROJECT





Who is in the room? Depending on the crowd I am in, three main groups...



The "pink" elephant in the room

Many nonprofit donor databases lack extensive tracking of LGBTQ+ donors - even within LGBTQ+ serving nonprofits.



LGBTQ+ IDENTITIES

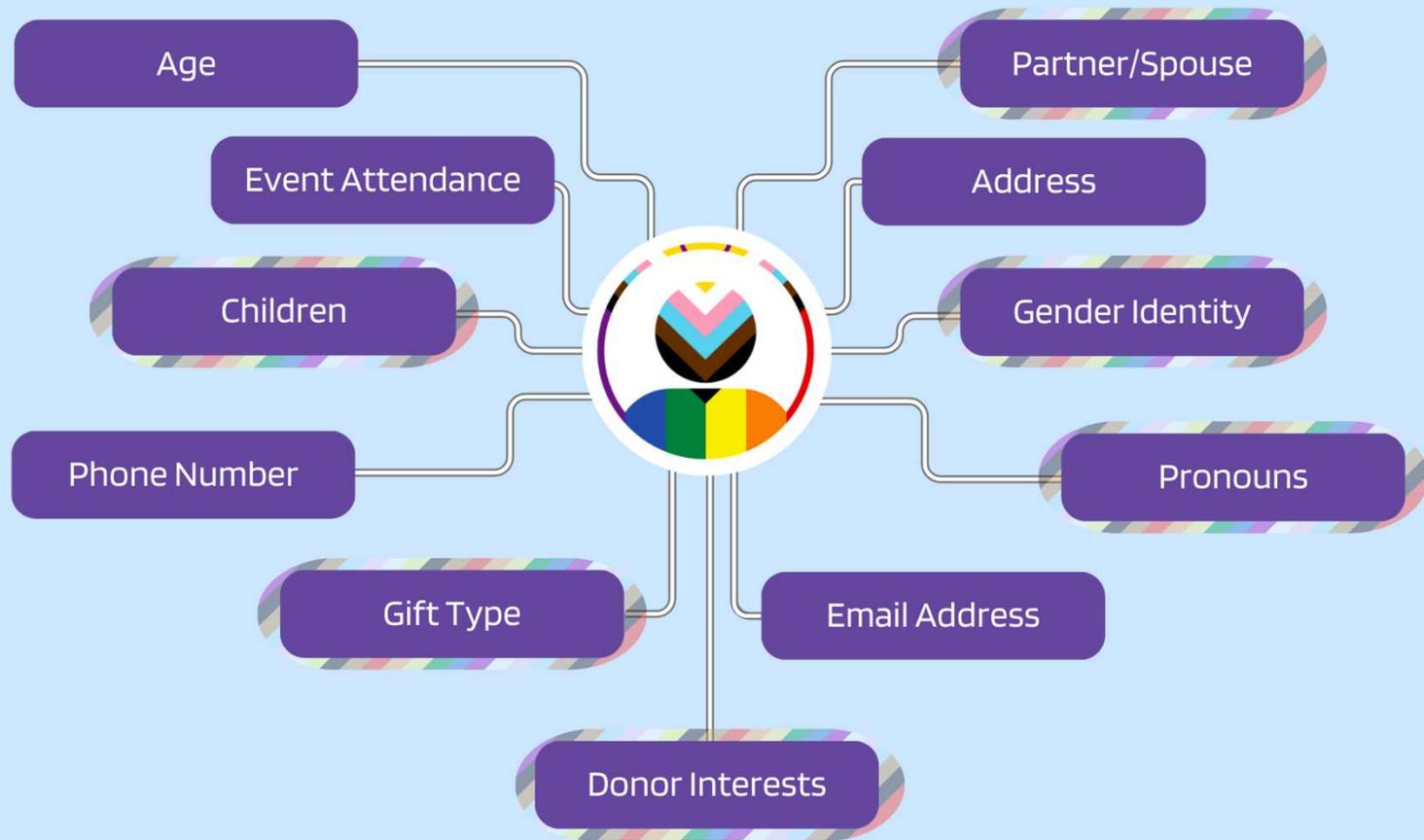


Identifying LGBTQ+ Donors What Can We Do?

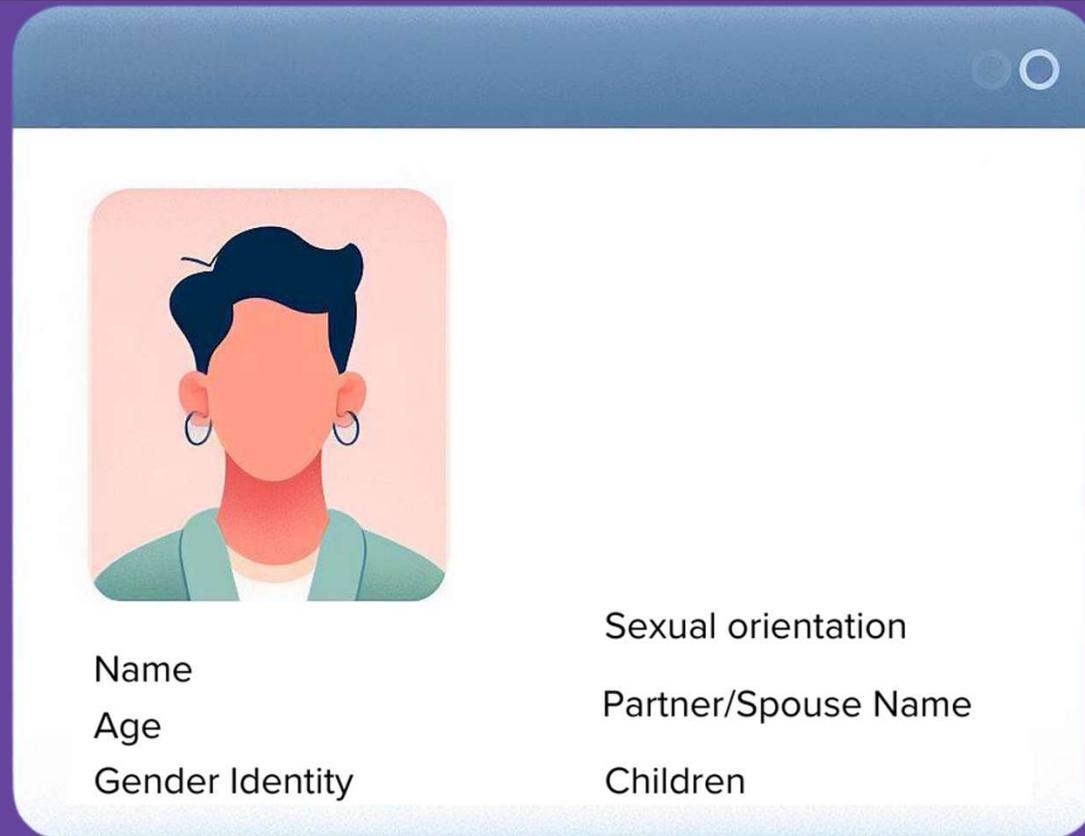
Williams Institute at UCLA & Funders for LGBTQ Issues Have
Model Data Collecting Standards

Side note: Watch ACLU in 2024 on this issue

Data Collection Process for Your CRM

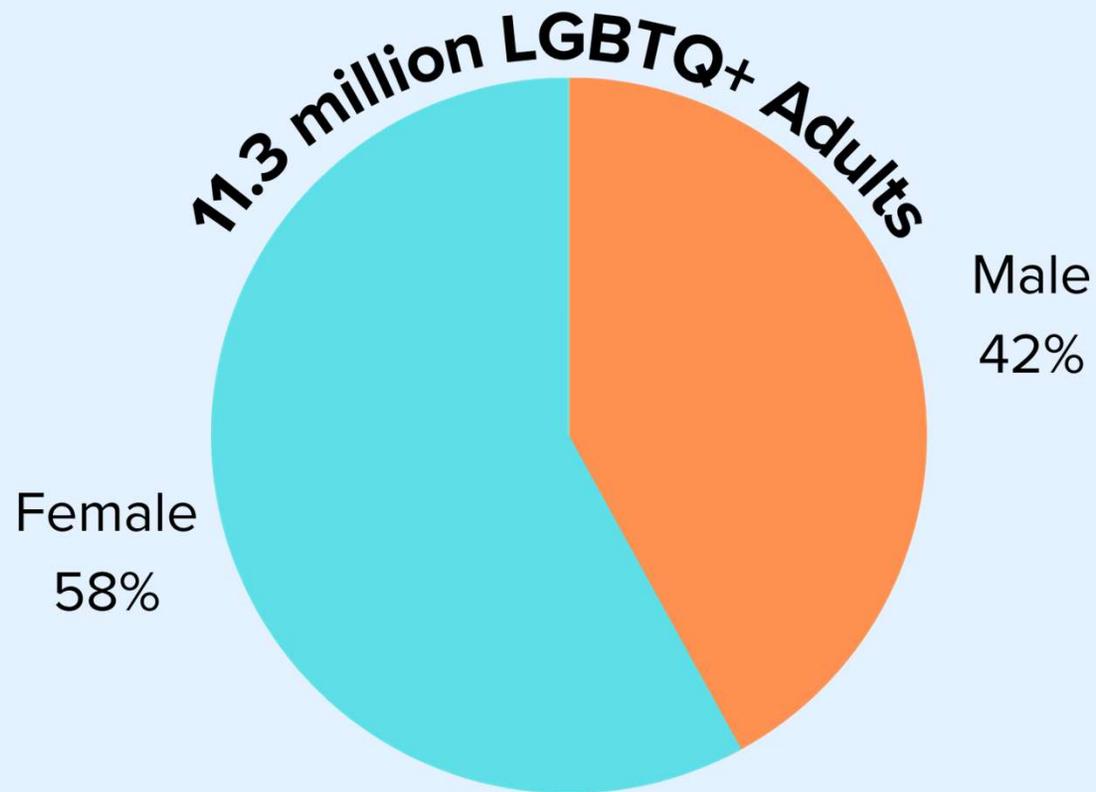


Growing Your Number Of LGBTQ+ Issue-Interest In Your CRM





Market for LGBTQ+ Donors

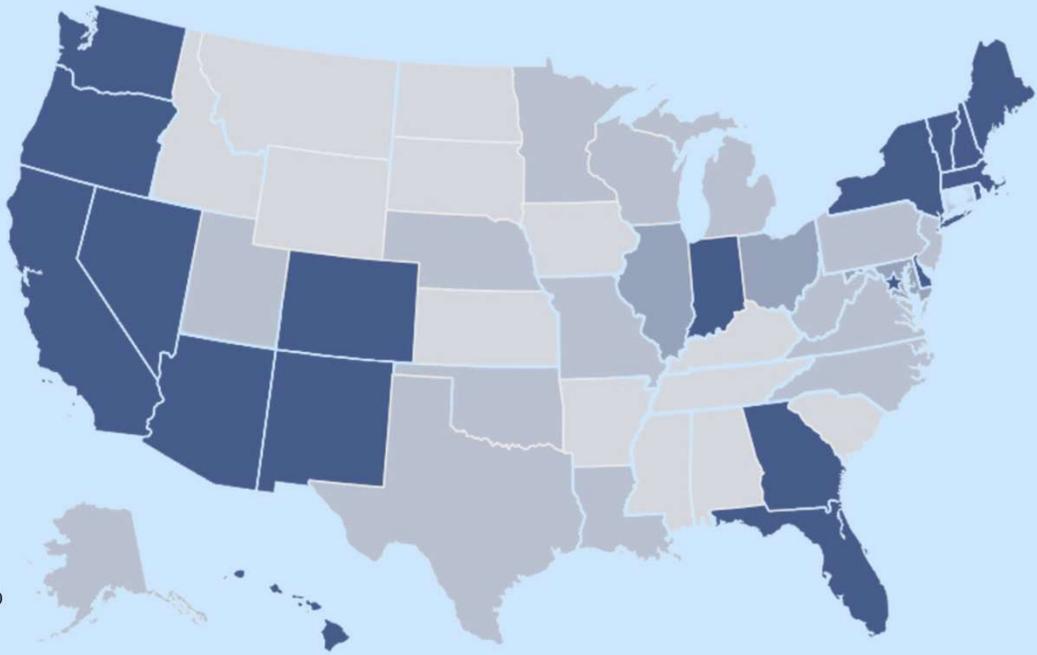
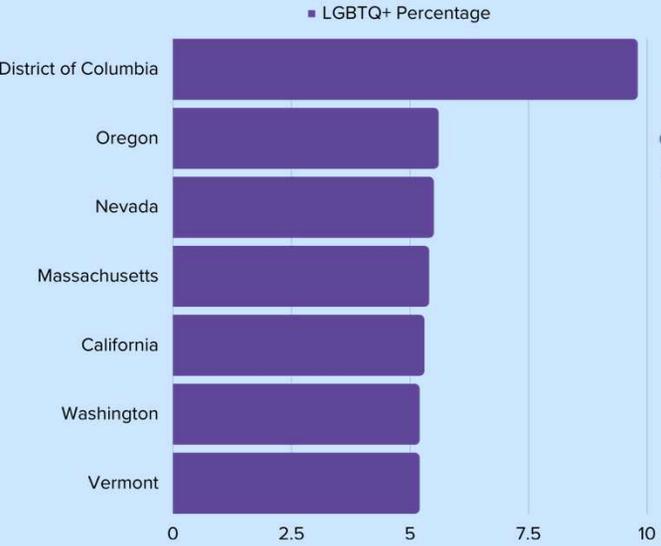


Nationwide Data: LGBTQ+ People – survey organizer did not consider gender fluidity and nonbinary people

States

LGBT Proportion of Population: United States

Below 3.7%
 3.7% - 4.1%
 4.1% - 4.5%
 4.5% and above



WHO IS INCLUDED IN THE LGBT ESTIMATES?

The Gallup Daily tracking survey asks respondents, “Do you, personally, identify as lesbian, gay, bisexual, or transgender?”. We include all individuals in the data that self-identified as LGBT (both single and coupled). That is who is presented on these maps and charts. Thus, these data give a peek at the characteristics of the LGBT community living in the United States as a whole.

From UCLA’s Williams Institute (2021)

TOP 5 CITIES

NYC: 706K

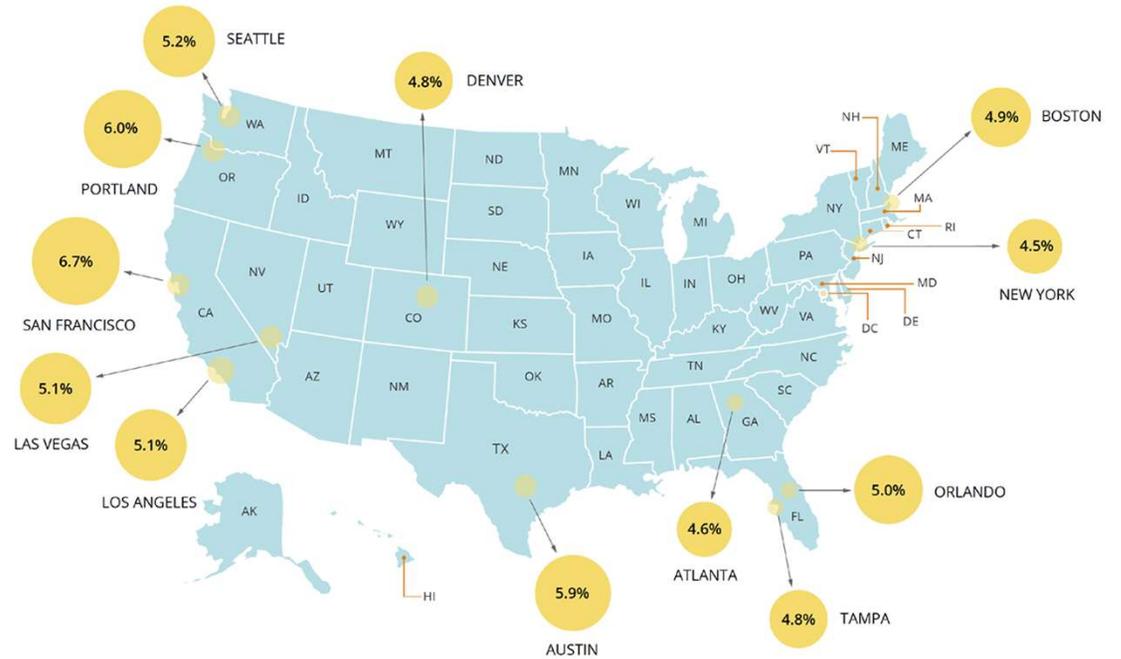
LA: 523K

CHI: 298K

SAN FRAN: 247K

MIAMI: 214K

Top 10 metropolitan areas in the US by LGBT percentage



LGBT Adults in Large US Metropolitan Areas (March 2021)

THE WILLIAMS INSTITUTE

AGE
BAND
FINDING

Sexual Orientation or Gender Identity, by Generation, 2022

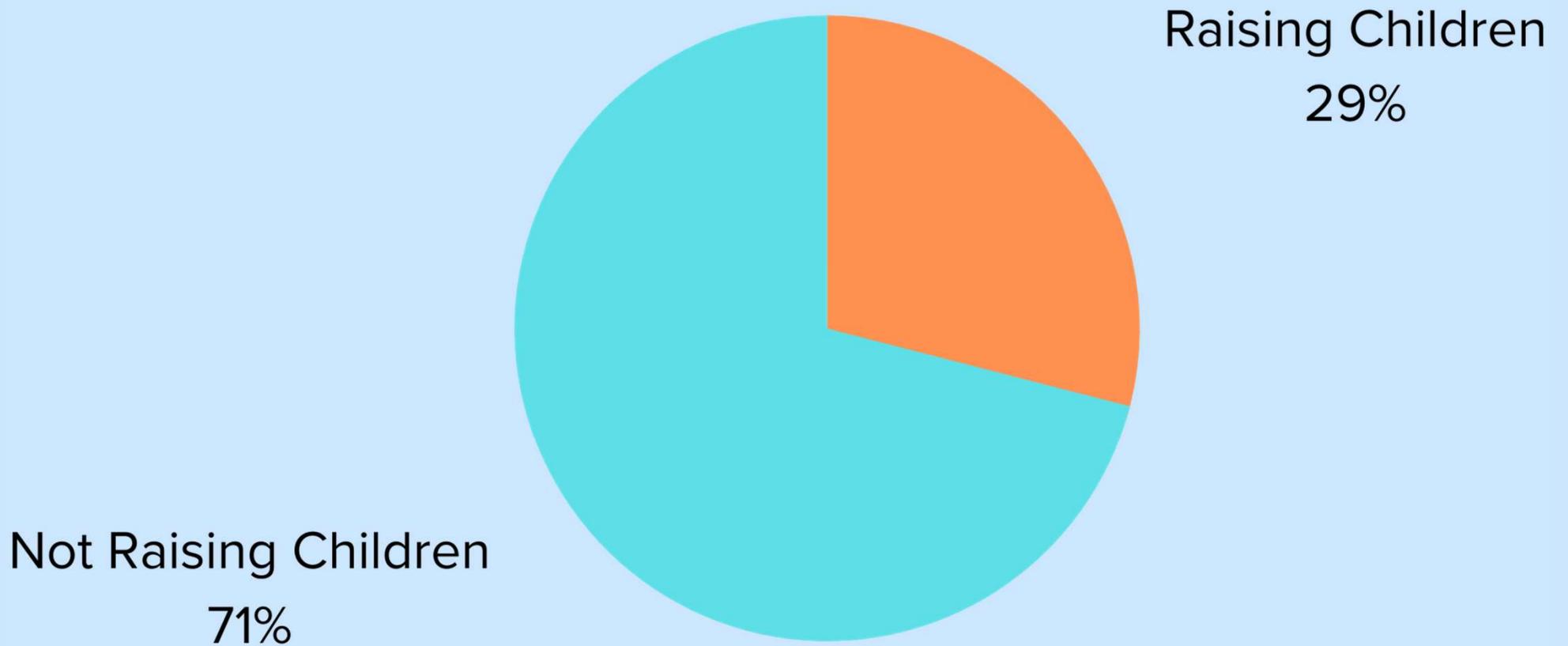
Which of the following do you consider yourself to be? You can select as many as apply. Straight or heterosexual; Lesbian; Gay; Bisexual; Transgender

	Generation Z %	Millennials %	Generation X %	Baby boomers %
Total LGBT	19.7	11.2	3.3	2.7
Lesbian	2.2	1.5	0.5	0.7
Gay	3.4	1.9	0.8	1.0
Bisexual	13.1	6.9	1.6	0.7
Transgender	1.9	1.0	0.3	0.2
Other LGBT	1.5	0.2	0.1	0.2

Sum of categories may exceed the total because respondents can choose multiple identities.
 Birth years for each generation: Generation Z (1997-2004), Millennials (1981-1996), Generation X (1965-1980), baby boomers (1946-1964), Silent Generation (1945 and earlier).
 Based on aggregated data from 2022 Gallup telephone polls.

GALLUP®

LGBTQ+ Adults w/Kids





RELATIONSHIP STATUS
– ALMOST 2/3 OF LGBTQ+
ADULTS ARE UNMARRIED

2:1 RATIO

Breakout Group Questions

1. What are you doing to identify any LGBTQ+ donors or do you know of any LGBTQ+ donors already?

2. Is there anything surprising from the data about the market thus far? Anything you want to know more about?



Market Timing 2025-2050+

*** Great wealth transfer Now**

*** Stonewall Generation/s Dying**

*** Singles without children – numbers & % shrinking**

*** Caveat: the #s of LGBTQ+ people is trending up**

**Also important – Federal Reserve of St. Louis (2022) &
IGLSS Findings of UMASS Amherst (2002-present) Wealth
Data Findings**



LGBTQ+ Propensity to Give Appears Significant

16% surveyed in the LGBT Giving Project made a planned gift to an LGBT Organization; Additional 35% said they would.

Among known LGBTQ+ donors, 46% said they are moderately open to leaving a gift to an LGBTQ+ purpose.

In comparison, James (2013) & Sanders (2013) – 5% and 4.9% for general population leave a gift to charity in their plans.





Psychographic Findings

**Data about
LGBTQ+
Donors to
General, Non-
LGBTQ+
Causes**

Identity As Democrats is NOT Uniform

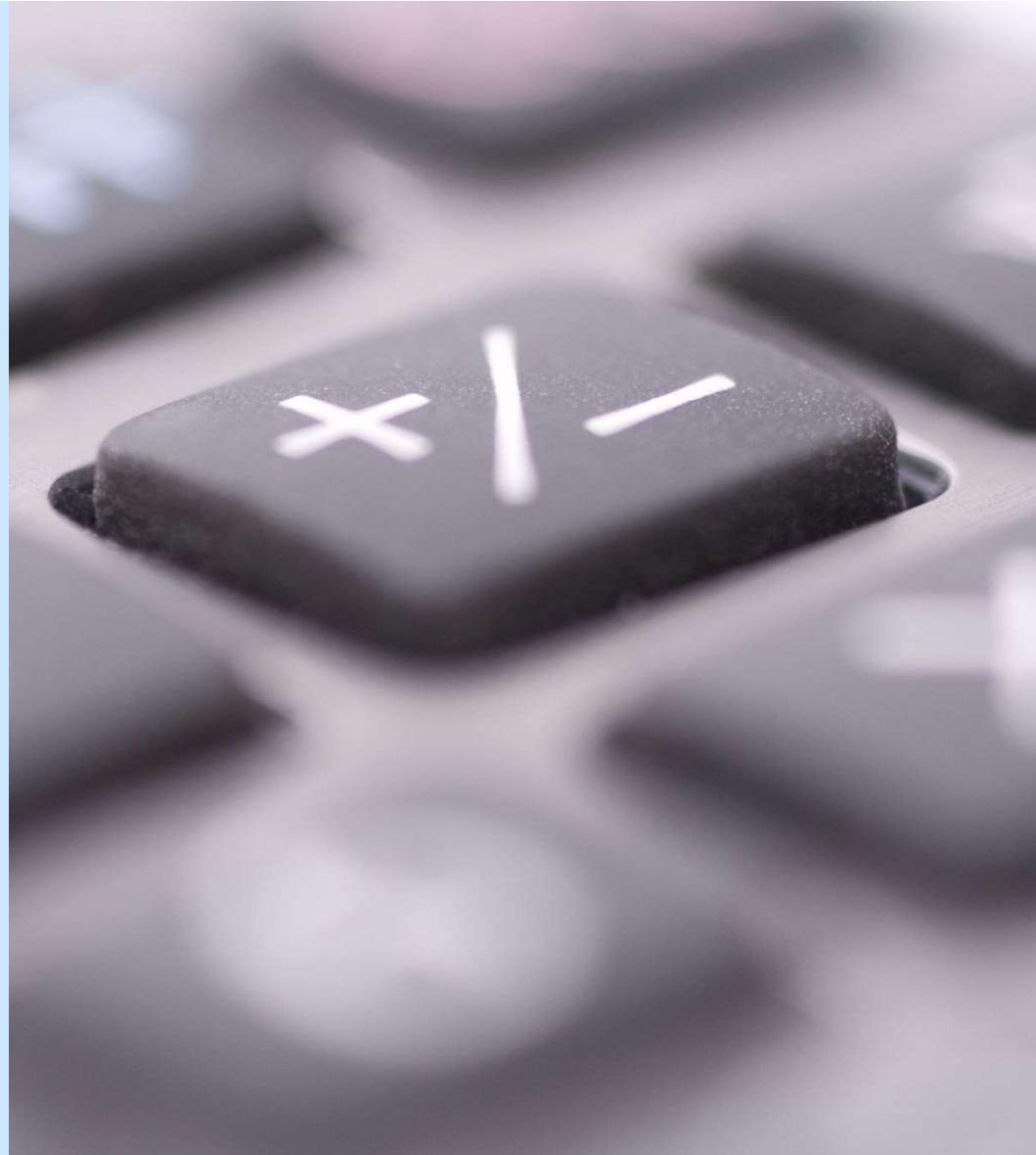
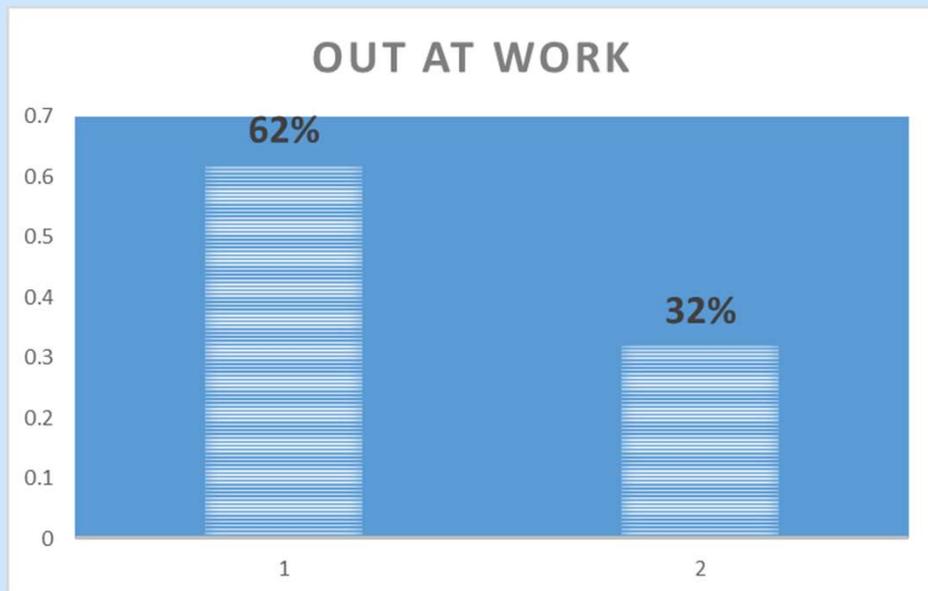
52% of LGBTQ+ Donors to
General Nonprofit (not LGBTQ)
Causes are Democrats

Versus

78% of LGBTQ+ Donors to
LGBTQ+ Causes are Democrats



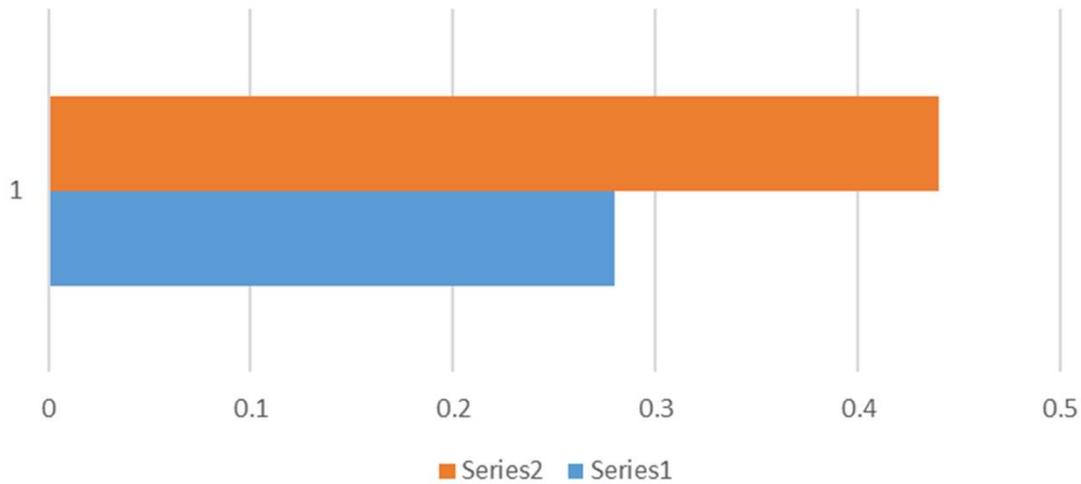
Donors to LGBTQ+ Causes Versus Donors to General Causes



General LGBTQ+ Donors
Surveyed – More Likely to
Report Thinking Other
non-LGBTQ+ Causes Are
More Important than
LGBTQ+ Ones

44% v. 28%

Top - Non-LGBTQ+ Cause Donors v.
Bottom - LGBTQ+ Cause Donors





LGBTQ+ People Of Color
(n=783)

Prioritized social services with an emphasis on youth and elders



WOMEN DONORS
SURVEYED (LBTQ+) –
N=2,277

* EXPRESS CONCERN
ABOUT MALE
DOMINATED ENTITIES

* HIGHER LIKELIHOOD
TO GIVE THAN MALE-
IDENTIFIED
INDIVIDUALS WHO GAVE
TO LGBTQ+ CAUSES



LGBTQ+ RURAL FOLKS (N=684)

**No variation in terms of comparison to the
general population of those surveyed**

Transgender
Individuals (n=412)

**44% prioritize
giving to
LGBTQ+ causes**



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LGBTQ+
Millennials
(n=934)

**Prioritize giving to
nonprofits that have
diverse staff and
leadership and
those groups
supportive of
Transgender people**



This Photo by Unknown author is licensed under CC BY-SA-NC.

LGBTQ+ Gen
Xers (n=2,769)
and Older

**Favorably respond to
messages and groups
focused on equality**



Bisexuals, Bi+ Population

- * This segment was represented in the large study but with a disproportionate percentage skewing younger than average.
- * No significant findings on giving priorities
- * Higher % are not publicly out



LGBTQ+ donors responded highest to these issues:

A word cloud of social issues. The words are arranged in a roughly circular pattern. The largest word is 'Rights' in blue. Other prominent words include 'Family' in orange, 'Health & Wellness' in dark blue, 'EDUCATION' in purple, 'Community' in orange, 'ENVIRONMENT' in teal, 'Equality' in blue, and 'Financial Security/Safety' in red. The words are of various sizes and orientations, creating a dynamic visual effect.

Family
Rights
Health & Wellness
Community
ENVIRONMENT
Equality
Financial Security/Safety
EDUCATION



Matt Foreman, former Senior
Program Director, LGBT Equality

evelyn & walter
HAAS JR. fund

*The messaging is important,
however, “wording of a
message is far less
important than cultivating
the relationship over time.”*



LGBTQ+ Donor Case Examples

- LGBTQ+-Focused Charities
- Mix of Causes
- Non-LGBTQ+ Causes
- Unfulfilled Wishes

LGBTQ+
Focused
Donors:
Dipti Ghosh
and Meggy
Cutuaco

**Donors to Horizons
Foundation**



Mix of Non-
LGBTQ+ and
Pro-LGBTQ+
Causes:

**Jennifer
Pritzker**

**Donor to The Palm Center
(UC Santa Barbara) and
Norwich University. Trans
donor giving to both Trans &
non-Trans causes**



Non-LGBTQ+
Causes:

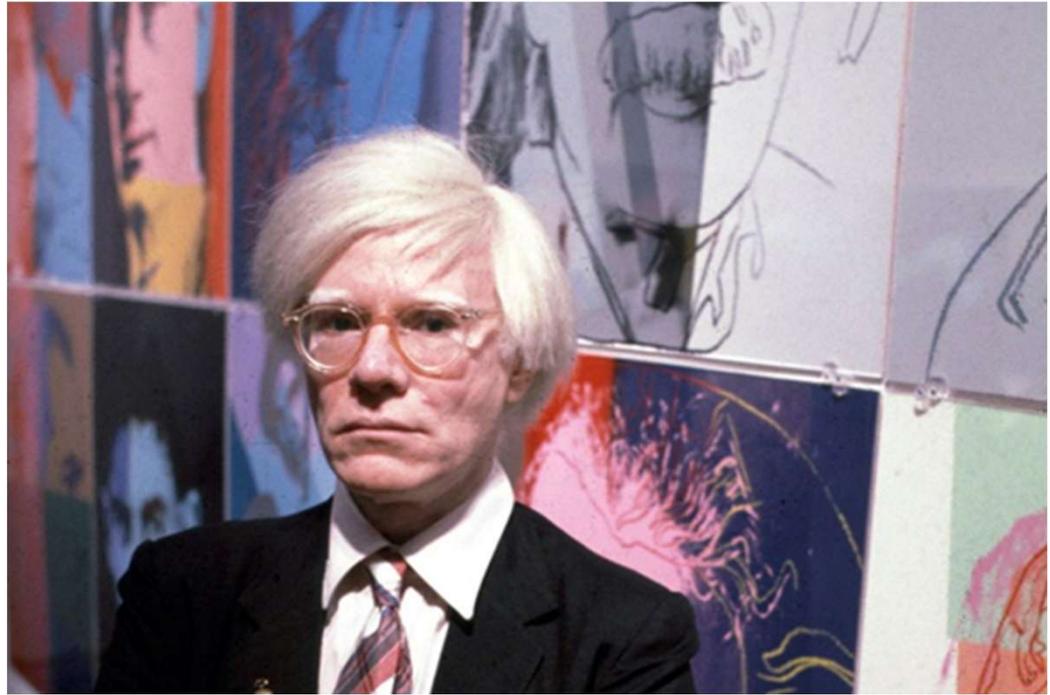
**Norris
Herndon**

**Black gay donor to NAACP
Legal Defense Fund, YMCAs
in Greater Atlanta, Youth
Mentorship Programs, Boys
& Girls Clubs, and he and
his father were deep
funders of Civil Rights
Causes**



Mix of LGBTQ+
and Non-
LGBTQ+
Causes:
Andy Warhol

- Most of the charitable work and grantmaking is through the Andy Warhol Foundation for the Visual Arts



Non-LGBTQ+
Causes:

**Anne Lister
(also known as
Gentleman
Jack)**

Anne was ahead of her time, one might argue she was nonbinary by today's standards. Lister gifted her estate, Shibden Hall, in the 19th Century to her life partner, Ann Walker. After Walker's death, the property became a public museum (Photo credit, HBO)



Non-LGBTQ+
Causes:

Kathy Whitworth

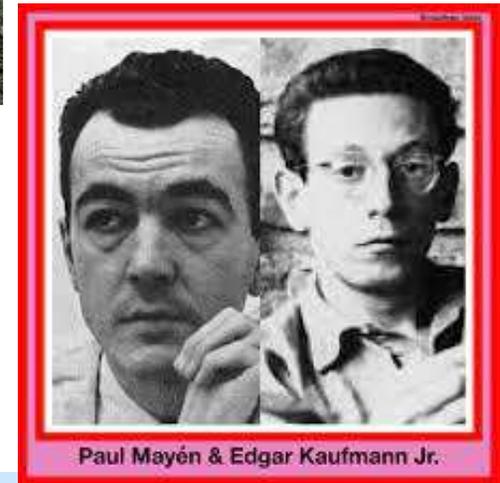
Whitworth, a lesbian, is professional golf's winningest player having won more tournaments (88) than Tiger Woods and Sam Snead (82 each). She created a foundation now run by her widow, Bettye Odel, to support emerging women and girls to play golf.



Non-LGBTQ+
Causes:

**Edgar
Kauffman, Jr.
& Paul
Mayén**

Spanish architect Paul Mayén (the second designer at Frank Lloyd Wright's Fallingwater) and the long-term partner of Edgar Kauffman, Jr., the heir to the estate, gifted the property to the Western PA Conservancy. Mayén later gifted the design and created the visitors center, café, and store.



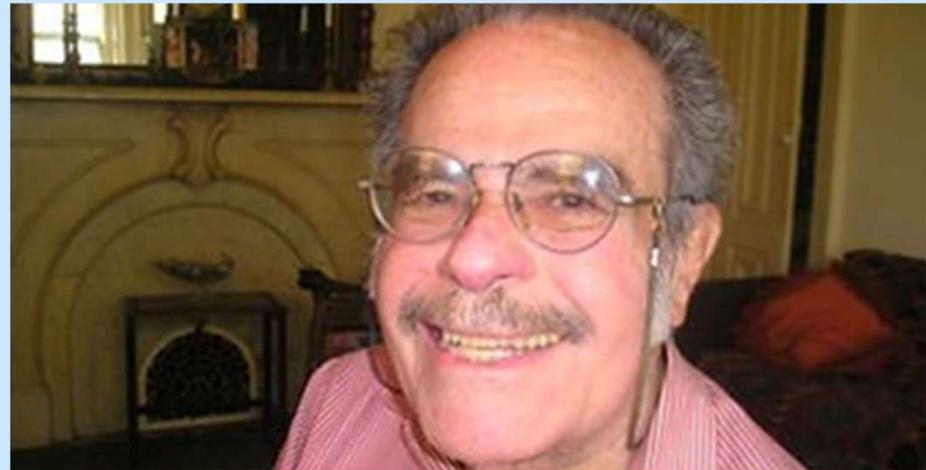
Paul Mayén & Edgar Kaufmann Jr.

PRIMARILY LGBTQ+ CAUSES:

**WALTER LEAR, BARBARA
GITTINGS & KAY LAHUSEN**

Early LGBTQ+ Movement Leaders:

**Walter Lear's Trust and estate plan
plus the Barbara Gittings Charitable
Trust supported multiple LGBTQ+
organizations**



Unfulfilled
Wishes:

**Movement
Leader Bob
Morrison and
Actress Anne
Heche**

On the one hand, Morrison publicly presented his plans to give to support LGBTQ+ Scholarships and arts organizations. Additionally, Anne Heche's 20-year-old son, Homer Laffoon, had to file paperwork to navigate the estate process on his own before accessing any assets to support the family.



My Findings – Room for More Discovery

Sample: Last 28 Months – 55 LGBTQ+ Donors/Households





More than half intend to use valuable non-cash assets; real estate is the leading category

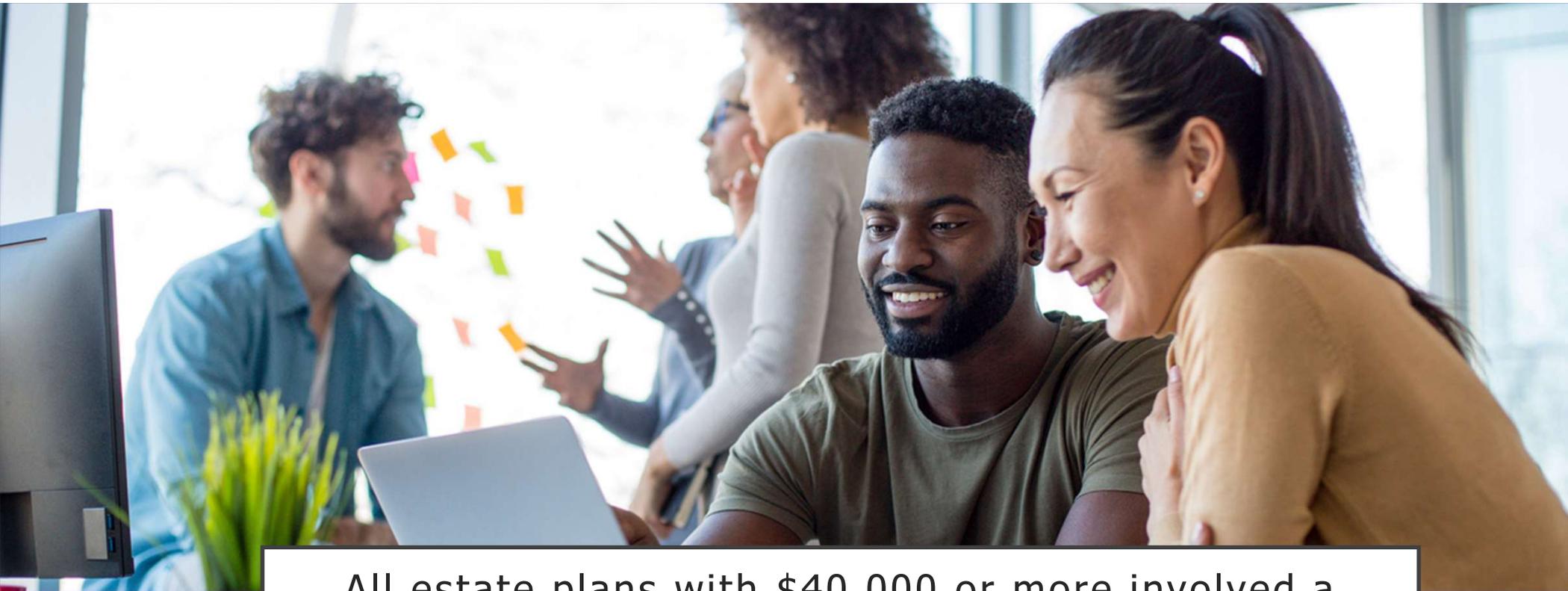
More than half
intend to
include at least
one LGBTQ+
purpose



More than half want to name non-LGBTQ+ causes or organizations

More than half
have either
changed their
estate plan in
the past five
years or intend
to amend their
plan by 2025





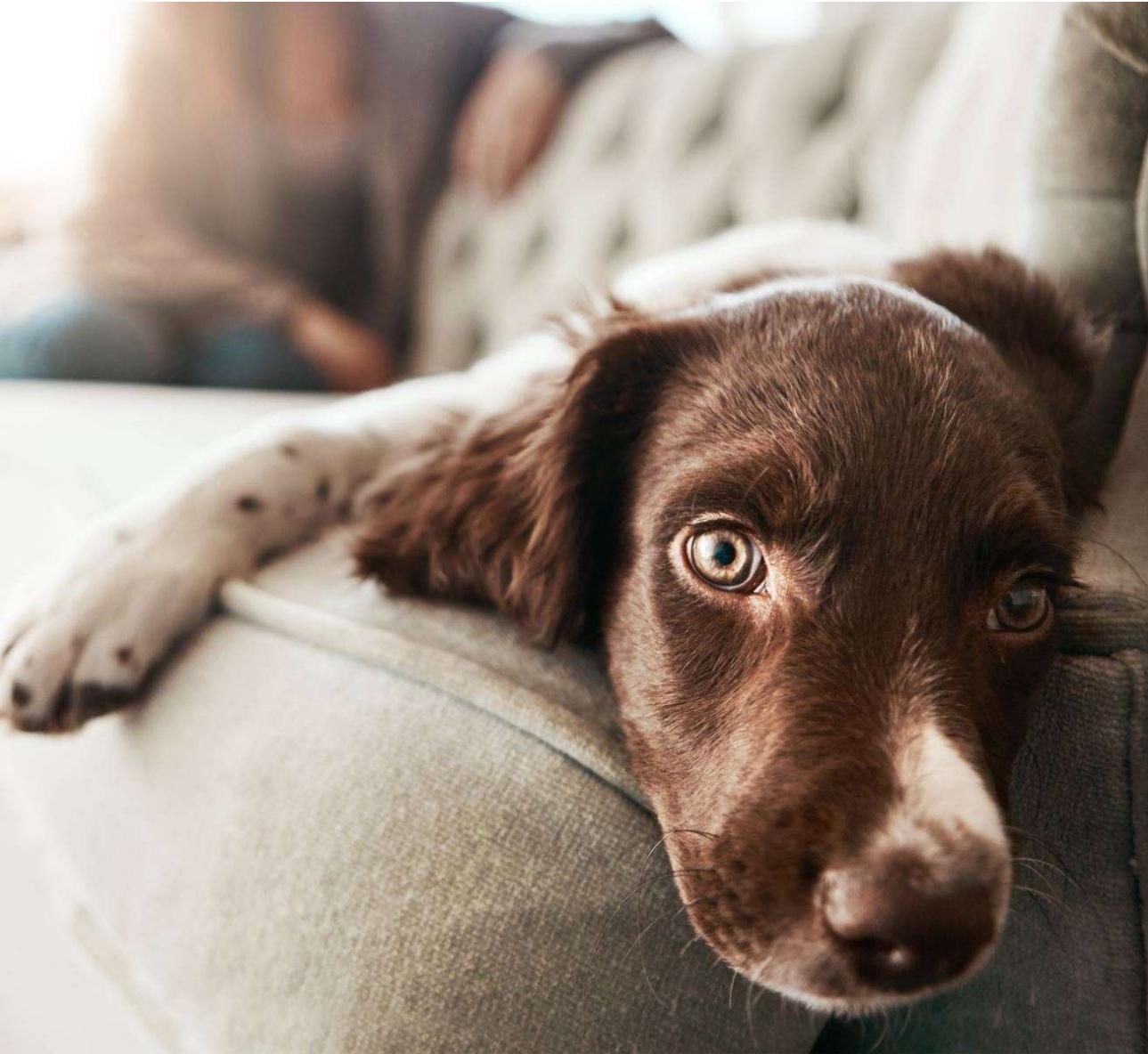
All estate plans with \$40,000 or more involved a professional advisor and many involved an assigned estate executor



Many, but not quite half of those asked, reported they named charities in their life insurance and retirement plans



More than 1/3 are collectors of highly valuable items (Almost all over 100K; some are part of 7 or 8 figure estates) and most want to learn more about options on how to include their collections in their estate plan.



Most, when asked, say they want to gift some of their wealth to a partner/spouse, family member, and/or friend/s.

Some included support for pets.

Breakout Group Question

What is one recommendation you would make to a charity looking to engage more LGBTQ+ donors through their life planning?





DATA-INFORMED
RECOMMENDATIONS



**DONORS WITHOUT CHILDREN –
A GOOD GROUP TO PRIORITIZE**



The "Big Queer Study" Findings

1. Donors Avoid Orgs they Perceive as Inefficient, Dishonest

2. Investments of 25-35K – ROI is Five Fold+ for Most

3. Donor Case Stories Inspire Greatly

LGBTQ+ Donors Will Gift
Non-Cash Assets





LGBTQ+ Example Donor – They are CREATIVE! [March 2023]

Assets (with valuation by professional advisor):

Cash

Non-Cash Assets

Successful Catering Business

Distribution:

Charity

Key staffer to be granted part ownership

Transfer business to new primary owner

Life income streams (multiple) to self

Access to real estate through death

VOLUNTEERS
FOR
FEEDBACK

Name one
recommendation
you feel is viable



A pair of black-rimmed glasses with clear lenses is resting on a light-colored surface, possibly a desk. The background is softly blurred, showing a computer monitor and other office equipment. A semi-transparent purple rectangular box is centered over the image, containing the text "GIFT ACCEPTANCE POLICY REVIEW" in white, uppercase letters.

GIFT ACCEPTANCE POLICY REVIEW

Professional Advisors

Over 90% who include charity in their plans use LGBTQ+ and allied professional advisors

(Examples: Amy Steerman – top, and Tommy Berner, bottom)





WHAT IS THE 10 YEAR
RETENTION RATE OF PLANNED
GIFTS FOR DONORS AGED
50+?

Just 55%

(Source: James & Baker, 2015)

**Prompted a New Process –
Planned Gift Donor Intention
Form**



LGBTQ+ Planned Giving References & Resources

1. [National Task Force on LGBTQ Planned Giving](#)
2. [LGBT Giving Project](#)
3. [Data Collection Guide](#)
4. [ABA – Guide for Attorneys](#)
5. [Gift Acceptance Policy Example](#)
6. [Donor Intention Form Example](#)



THANK YOU FROM PHILADELPHIA!

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RPM Consulting Group

