

# THE OUT IN THE SOUTH INITIATIVE

INSPIRING PEOPLE AND  
PHILANTHROPY TO  
STRENGTHEN SOUTHERN  
LGBT COMMUNITIES



FUNDERS FOR  
LGBTQ  
ISSUES

# “COMING OUT.”

It’s an act of bravery and honesty that lesbian, gay, bisexual and transgender (LGBT) individuals have done for generations. Every time it happens, it is an opportunity for progress. While some still experience negative reactions from family and friends, the act of coming out is a powerful testimony, both personally and politically. Hearts and minds are changed, even if it takes a little time.

For many LGBT individuals, their coming out was a moment of liberation that has empowered them to live their lives openly, honestly, and on their own terms. Yet for others, those conversations have resulted in rejection, isolation, and sometimes violence. These conversations take place every day in every part of our country, including the U.S. South – and perhaps more often in the South than you may think.

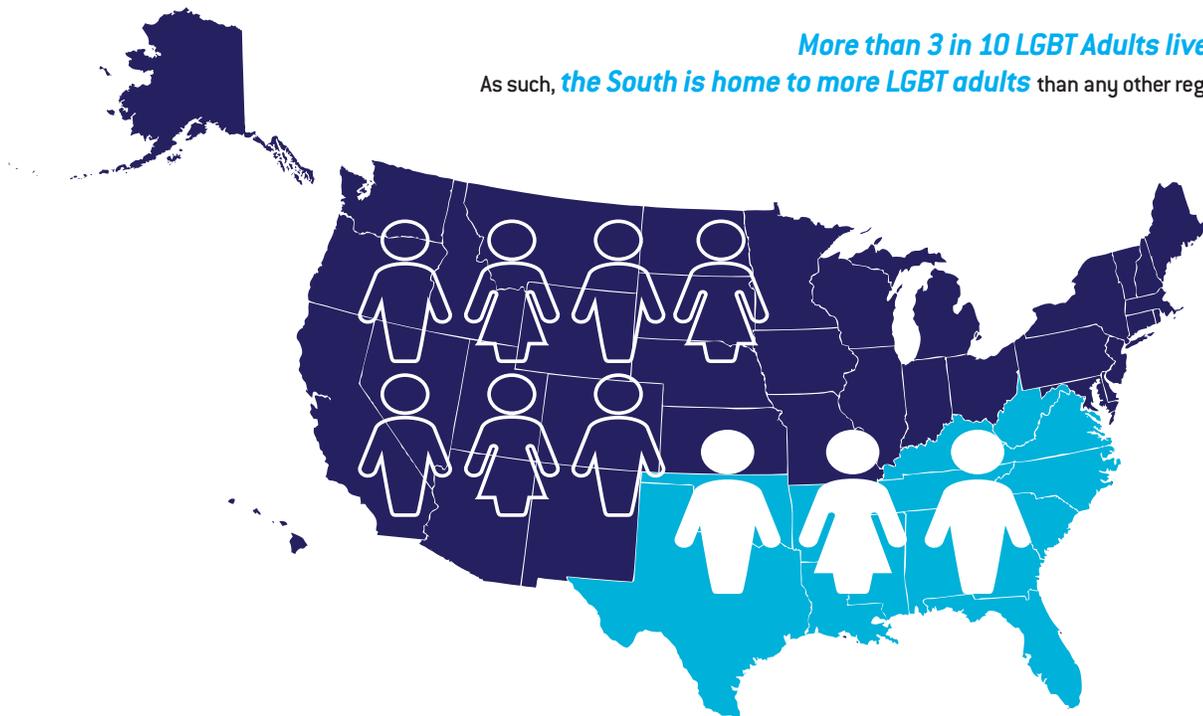
Increasingly, LGBT Southerners are living their lives “Out in the South,” and the myriad organizations that serve this beautiful and diverse community – along with the funders that support them – are working every day to strengthen and care for these communities and create a brighter future.

**“SURELY THE EARTH CAN BE SAVED BY ALL THE PEOPLE WHO INSIST ON LOVE.”**  
— ALICE WALKER

More than one in three (32 percent) American adults who identify as LGBT live in the U.S. South. For them, home is one of 14 states: **Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia, or West Virginia.**

*More than 3 in 10 LGBT Adults live in the South.*

As such, *the South is home to more LGBT adults* than any other region of the country.



However, for an LGBT Southerner, the day-to-day lived experience is markedly different from that of her LGBT peers who live elsewhere in the U.S., as well as her non-LGBT neighbors. According to a recent report published by the Williams Institute, the typical LGBT Southerner is more likely to live in a community that has a social climate that is hostile towards LGBT people. If she is in a relationship, she is more likely to be raising children, but likely only one of them can be recognized as the legal parent. Household income is, on average, \$11,000 less than their opposite-sex neighbors. They are more likely to be uninsured, and they have no statewide legal protections from being fired, evicted, or turned away from a local restaurant—just for being gay. LGBT Southerners are also more likely to be people of color, so these challenges are often compounded by race, poverty, or immigration status.

Between 2012 and 2013, Southern LGBT organizations received less than six percent of domestic LGBT funding, or \$2.37 per LGBT adult compared to a national average of \$6.05 per LGBT adult. As a result, LGBT Southern leaders and organizations work hard to build community and solve problems with minimal resources.

It's time for a broader conversation. ***The Out in the South Initiative: Inspiring People and Philanthropy to Strengthen Southern LGBT Communities***, is an initiative to create a more robust, inclusive conversation among Southerners – individuals, families and funders alike – around issues of community and philanthropy to ultimately empower LGBT Southerners to shape their own lives and futures.

## I'M IN!

There is more than one way for you and/or your organization to say ***"I'm in!"*** to get involved with and support efforts to strengthen Southern LGBT communities.

We invite you to choose a starting point that is best suited for you and your organization. Over time, as you learn more about the opportunities that exist, you may choose to broaden your involvement in other ways. It's entirely up to you.

By saying ***"I'm in!"*** you are demonstrating that you are willing to listen, to learn, and to consider how deliberate and intentional actions and grantmaking can improve the lives of every person in the communities served by your foundation, regardless of their sexual orientation or gender identity or expression.

- **Join the Conversation: The Out in the South Funder Network**
- **Help Increase Grantmaking for Southern LGBT Communities**
- **Support the Out in the South Fund: Catalyzing Sustainable Philanthropy in Southern LGBT Communities**

**VISIT [WWW.OUTINTHESOUTH.ORG](http://WWW.OUTINTHESOUTH.ORG) FOR MORE INFORMATION  
AND TO GET INVOLVED!**

# JOIN THE CONVERSATION: THE OUT IN THE SOUTH FUNDER NETWORK

Funding change across an entire region is complex. No one has all the answers, and we all have questions, challenges, and new ideas. That's okay.

That's why we have created a ***Out in the South Funder Network*** for funder representatives who would like to have conversations with each other, to learn more about how Southern LGBT populations and issues intersect with their own funding priorities, and to share experiences and best practices.

The ***Out in the South Funder Network*** is comprised of funders that have a long history of supporting LGBT issues in the South, as well as those that are new to funding in the sector or considering it for the first time. For some, LGBT-inclusive funding is a natural extension of their funding priorities, whether their focus is on health disparities or economic opportunity. Whether you represent a family foundation, a community foundation, a corporate foundation, an LGBT community fund, or another type of funder, the ***Out in the South Funder Network*** provides a forum for you to connect with others who are committed to improving the lives of LGBT people in the South.

The primary goal of the ***Out in the South Funder Network*** is to enhance coordination and communication among funders to maximize effectiveness and impact. This will be accomplished through a variety of activities, including conference calls, issue briefings, an ongoing listserv, informal peer-to-peer networking, and occasional in-person meetings and receptions. You may choose to participate in as many or as few of the Network's activities as you wish.

There is no financial commitment to join the ***Out in the South Funder Network***. It is intended to be a peer-to-peer networking opportunity, and joining simply demonstrates your openness to learning more about how your fellow funders are responding to the needs and opportunities for funders to strengthen LGBT communities across the South.

## ***Charter members of the Out in the South Funder Network include:***

- **Appalachian Community Fund** (KNOXVILLE, TN)
- **Arcus Foundation** (NEW YORK, NY)
- **Charlotte Lesbian and Gay Fund** (CHARLOTTE, NC)
- **Chartrand Family Fund** (JACKSONVILLE, FL)
- **Community Foundation for Northeast Florida** (JACKSONVILLE, FL)
- **Community Foundation of Greater Atlanta** (ATLANTA, GA)
- **Community Foundation of Greater Greensboro** (GREENSBORO, NC)
- **Community Foundation of Middle Tennessee** (NASHVILLE, TN)
- **Ford Foundation** (NEW YORK, NY)
- **Foundation for a Just Society** (NEW YORK, NY)
- **Foundation for Louisiana** (BATON ROUGE, LA)
- **Foundation For The Carolinas** (CHARLOTTE, NC)
- **Freeman Foundation** (LOS ANGELES, CA)
- **Gill Foundation** (DENVER, CO)
- **Greater New Orleans Foundation** (NEW ORLEANS, LA)
- **Groundswell Fund** (OAKLAND, CA)
- **Guilford Green Foundation** (GREENSBORO, NC)
- **Laughing Gull Foundation** (DURHAM, NC)
- **LGBT Community Fund for Northeast Florida** (JACKSONVILLE, FL)
- **LGBTQ Fund of the Community Foundation of Greater Birmingham** (BIRMINGHAM, AL)
- **Mandel-Rodis Fund** (ASHEVILLE, NC)
- **Our Fund** (FORT LAUDERDALE, FL)
- **Third Wave Fund** (NEW YORK, NY)
- **Trans Justice Funding Project** (NEW YORK, NY)

# WAYS TO MAKE YOUR FOUNDATION MORE LGBT-INCLUSIVE

Whether you're a staff member or a member of the board of trustees, you are in a position to raise awareness and help facilitate dialogue about the LGBT population in your community.

If this feels like challenging and new territory, your organization is not alone. It is not uncommon for foundations and other organizations to be unfamiliar with or unaware of the unique challenges faced by LGBT individuals and families among the populations they serve.

Beyond giving consideration to new or increased funding in the LGBT sector, we invite you to consider this list of steps your foundation can take to be more LGBT-inclusive. Here's a suggested checklist:

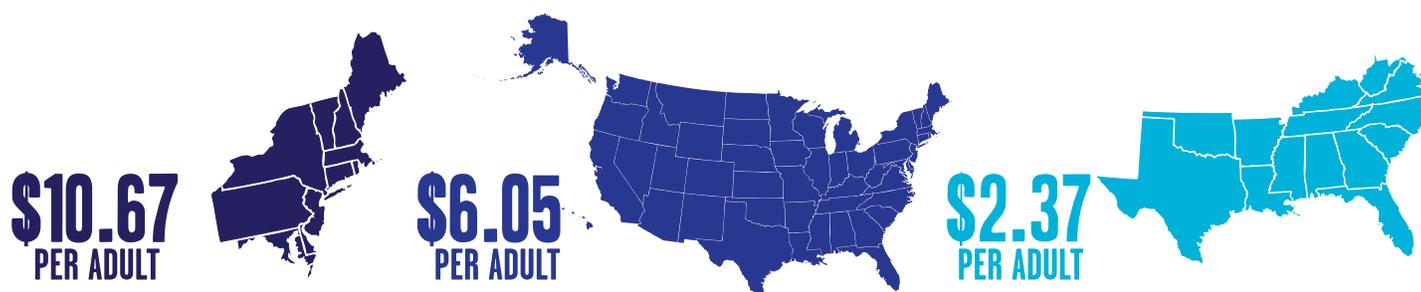
- Provide training on LGBT issues for your staff and/or board.**  
Fundors for LGBTQ Issues is happy to assist you in identifying training resources.
- Increase the knowledge and awareness** among your colleagues and board regarding LGBT issues in your community by circulating reading materials and offering expanded training opportunities.
- Include sexual orientation and gender identity** in your data collection on your board and staff demographics, and on the populations served by your grantees.
- Ask grantees if they currently serve LGBT populations** or if they feel prepared to do so. If not, inquire how your foundation might assist them.
- Make a deliberate effort** to learn about LGBT organizations in your region or issue area and reach out to learn more about their work.
- Distribute your requests for proposals (RFPs) to eligible LGBT organizations** that match your program priorities.
- Ensure your organization's non-discrimination policies explicitly include protections** for sexual orientation, gender identity, and gender expression (and consider asking your grantees if they do likewise).
- Take steps to ensure your employee health insurance coverage and other benefits are fully LGBT-inclusive**, and especially trans-inclusive, since transgender people often face discrimination in healthcare.
- Conduct outreach to LGBT communities and organizations during your recruitment** for staff positions, your board nominations, and committees. Note in job postings that LGBT people are among the under-served communities that you encourage to apply — it sends a signal that you're open and inclusive.
- Ask your fellow funders at peer organizations if they have examined how to be inclusive of LGBT individuals/communities.**

# HELP INCREASE GRANTMAKING TO SOUTHERN LGBT ORGANIZATIONS

At our core, Americans value liberty, personal responsibility, opportunity, and a society that treats all of us equally. We aspire to provide for ourselves and our families, obtain an education, have access to quality healthcare, enrich our lives through the arts, work hard without worry of discrimination on the job, practice our faith as we choose, age with dignity, and love unconditionally. And, we expect our laws and justice system to respect, protect, and enable us in our pursuit of these basic and fundamentally human endeavors.

Nearly 8.5 million adults live openly as LGBT in virtually every community in the U.S., and nearly one-third of all LGBT adults – 2.7 million – live in the South. They have dreams and aspirations – and needs – that are not unlike most Americans.

Historically, because LGBT individuals have been largely invisible or simply not “out” due to cultural and social rejection, legal barriers, and other impediments, even those foundations that may have attempted to support the LGBT community have struggled to find meaningful and impactful ways of doing so. This has been particularly acute in the South, as evidenced by the disparate levels of funding provided to Southern LGBT organizations when compared to other regions of the U.S.



Between 2012-2013, LGBTQ domestic funding **averaged \$6.05 per LGBT adult.**

While the Northeast received an average of \$10.67 per LGBT adult, **the South only received \$2.37 per LGBT adult.**

Yet today, invisibility and lack of opportunity can no longer be used to rationalize the lower levels of funding. Millions of LGBT Southerners are “out,” and there are more than 750 LGBT community organizations across the 14 states of the Southern U.S. Unfortunately, between 2012 and 2013, those organizations received only 6 percent of domestic LGBT funding or \$2.37 per LGBT adult, compared to a national average of \$6.05 per LGBT adult. We can do better, and now is the time to redouble our efforts to do just that.

Foundations and other funders, by making grants that are intentionally inclusive of LGBT-serving organizations, can have an immediate and measurable impact across the region. Whether your grantmaking prioritizes education, youth, health care, HIV/AIDS, arts and culture, communities of color, faith, social justice, economic opportunity, women's health, or policy, there are many worthy programs and organizations that both align with your objectives and serve LGBT individuals and families.

Being intentionally inclusive of LGBT-serving organizations in your grantmaking can broaden and deepen your impact and further enrich the communities you serve. And, if your grantmaking is focused on benefiting a particular geographic area, a particular population of people, or provides funding in a particular manner, those objectives can coexist with being more intentionally inclusive of LGBT.

## HOW YOU CAN MAKE A DIFFERENCE:

Both national and Southern funders are invited to initiate (or increase) direct grantmaking that positively impacts LGBT Southerners in ways that align with your mission. **Here's how:**

### ➔ FOR FIRST-TIME FUNDERS TO LGBT ISSUES

Commit to make your first grant to an organization that primarily serves LGBT Southerners. Make a deliberate effort to learn about LGBT organizations in your community and reach out to learn more about their work. Distribute requests for proposals (RFPs) to LGBT organizations that may align with your funding priorities.

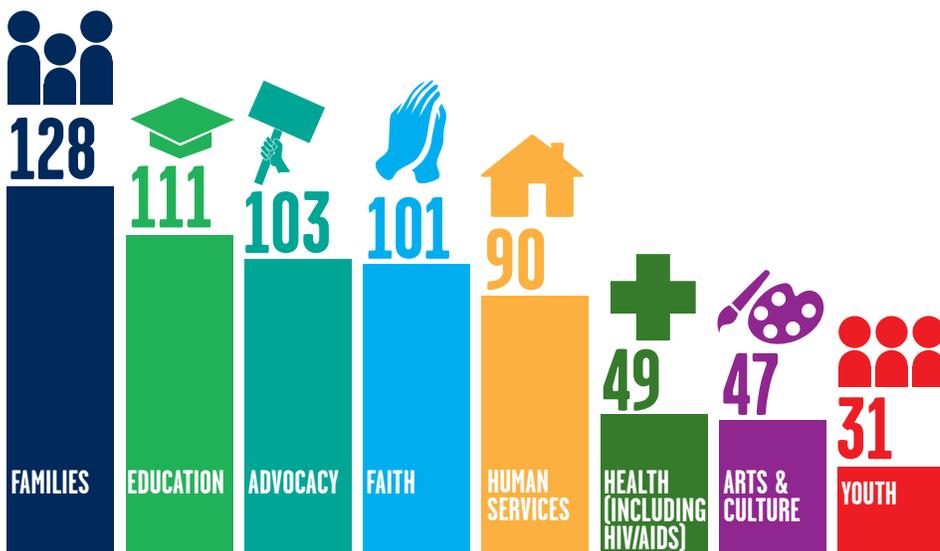
### ➔ FOR CURRENT FUNDERS TO LGBT ISSUES

Commit to increase your annual grantmaking budget for Southern LGBT communities. Make a deliberate effort to learn about Southern LGBT organizations and reach out to learn more about their work. Distribute RFPs to a broader group of Southern LGBT organizations that align with your funding priorities. Consider expanding your grantmaking to include the Out in the South Fund.

### ➔ FOR EVERYONE: BECOME AN AMBASSADOR

Help to deepen our engagement with a broader cross-section of people and organizations, including national and Southern funders, business and civic leaders, corporate executives, and community leaders. As an Ambassador, you can be instrumental to our efforts by lending your name, opening doors, and starting conversations with your peers.

## LGBT Community Assets in the South by Focus of Work



In 2014, Funders for LGBTQ Issues conducted a community scan of LGBT community assets in the South.

The scan identified **783 LGBT nonprofits, programs, and groups across all 14 states and addressing a wide range of needs and issues.**

Whatever your foundation's geographic and programmatic focus, there is likely an LGBT organization that matches your work.

With a database of **783 LGBT nonprofits and programs**, Funders for LGBTQ Issues can help you find one.

# THE OUT IN THE SOUTH FUND: CATALYZING SUSTAINABLE PHILANTHROPY IN SOUTHERN LGBT COMMUNITIES

Our longer-term goal is to dramatically increase direct grantmaking to eligible organizations that are working to expand equality and opportunities for LGBT people across the South. Such investments will enable organizations to have an immediate and positive impact on the lives of LGBT Southerners. But, then what happens?

We hope to catalyze a robust, indigenous culture of philanthropy that fosters local giving from both LGBT and allied donors to support the capacity and sustainability of local organizations serving the LGBT community. More often than not, philanthropy is local.

We strongly believe that local organizations – generously supported by local philanthropy – are best suited to meet the long-term needs of Southern communities in the most sustainable manner.

The Out in the South Fund facilitates a collective investment in sustainable philanthropy to benefit LGBT communities across the South. Like any catalytic agent, the Fund is intended to jumpstart and accelerate community-based giving and strengthen the LGBT civic sector of the region.

## HOW THE OUT IN THE SOUTH FUND WORKS

*The Out in the South Fund* is a pooled fund that enables foundations and other donors to combine their resources to award planning grants and matching funds to stimulate the creation and growth of local LGBT funds housed at various public foundations across the South. The unique power of this model is its two-level impact: (1) it builds up local LGBT funds as a sustainable source of LGBT philanthropy; and (2) local LGBT funds in turn serve as a vehicle for strengthening local LGBT community organizations.

### PUTTING THE MONEY TO WORK LAUNCHING AND BUILDING LGBT FUNDS:

**PLANNING GRANTS:** Provide planning/start-up grants to fund local community needs assessments (e.g., interviews, surveys) to determine the most pressing needs and opportunities in the local LGBT community and launch new LGBT funds across the South to meet those challenges.

**MATCHING GRANTS:** Provide grants for Southern LGBT funds to match gifts from local donors and foundations up to a specified fundraising target. The local LGBT fund then re-grants those dollars – plus the match raised from local donors – to local LGBT community organizations and programs.

## LGBT FUNDS: A CIRCLE OF GENEROSITY

Technically speaking, an LGBT fund is a “community-of-interest fund.” Simply put, it is a giving circle. It is a group of like-minded individuals (LGBT and allies too!) who give collectively and determine the focus of their philanthropy as a group. Through their generosity, donors are able to support the local LGBT community in addressing its most pressing challenges. Beyond the dollars, giving circles also build a stronger sense of community among participating donors and grantees. Giving circles are especially attractive to first-time donors to a particular cause, as the structure provides a welcoming environment for learning, engagement, and more sustained habits of giving.

Community foundations and other public charity foundations based in the South are key partners in this effort and are uniquely positioned to incubate and support the long-term viability of LGBT funds across the region. Created to foster broad-based community giving and investment in local nonprofit organizations, community foundations, women’s foundations, and other public foundations possess the resources and expertise to guide nascent LGBT funds to greater success and impact. In addition to administrative advantages and cost savings, establishing LGBT funds at existing foundations provides the benefit of exposure to a wider audience of allied community philanthropists. LGBT funds can benefit from the established foundation’s visibility and legitimacy in the community, and the foundation benefits by embracing a more inclusive mission. Through the foundation’s communications efforts, convening of stakeholders, and donor engagement activities, the needs of the local LGBT community and its organizations will undoubtedly find new opportunities for greater support.

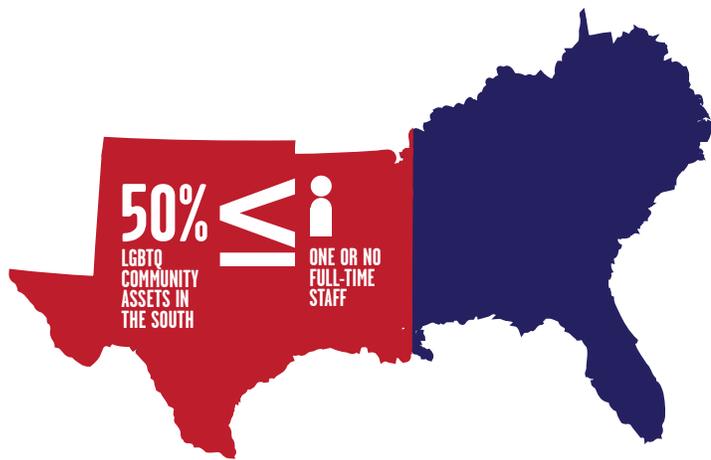
Often, a local community foundation may provide the best home for a new LGBT fund. At other times, a women’s foundation or progressive fund may be the best host. In some cases—especially if you already have a large and active donor base—it may make sense to found an independent LGBT foundation. If you’re considering starting a new fund, contact the staff at Funders for LGBTQ Issues, and we’d be happy to help you think through the process.

## THE IMPORTANCE OF CAPACITY BUILDING

Nearly half of the organizations participating in the survey have one or no full-time staff. In addition to their critical governance role, dedicated board members and other volunteers are often the ones responsible for managing programs, fundraising, communications, marketing, and technology. This lack of resources puts the important and sometimes lifesaving work of these organizations at high risk, unlikely to be sustained over time.

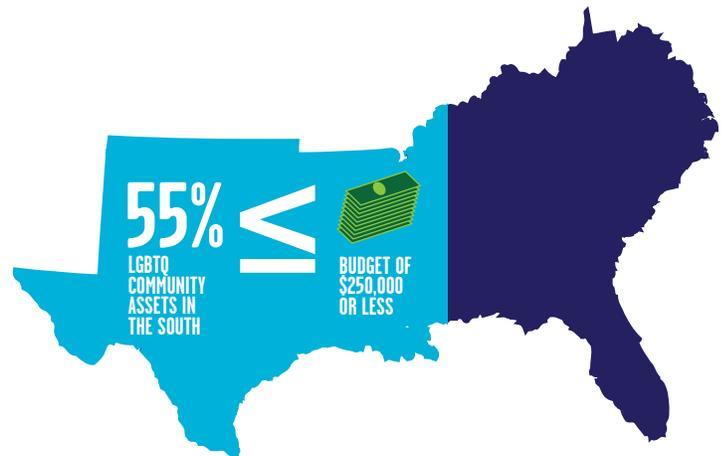
Capacity building can take many forms. The objective is to strengthen these organizations in ways that enable them to better fulfill their mission and serve their constituencies. For some, this may mean expanding their role in advocating for policy change at the local or state level. For others, it may mean broadening their work with intersectional issues such as women’s health, racial justice, or poverty and homelessness. Or, it could mean hiring their first-ever development or communications director.

There may also be cases when building capacity means supporting non-LGBT organizations to develop their competence in working effectively with LGBT communities. This could mean helping a health center improve its ability to provide care for trans communities, or it could mean supporting an immigrant rights advocacy group in being more inclusive of LGBT immigrants in their organizing. Building partnerships between mainstream service providers and LGBT communities can also be an important part of capacity-building.



Nearly 50 percent of LGBTQ community assets in the region operate with **only one or no full time staff**. (n=104)

Over 55 percent of LGBTQ community assets in the South operate with **a budget of \$250,000 or less** — with nearly 20 percent working with \$10,000 or less. (n=114)



Financial instability, a lack of experience in managing large grants, and inconsistent staffing have often resulted in large funders – both local and national – choosing to forego making grants to the small community-based organizations that are so essential in Southern LGBT communities. These organizations then find themselves trapped in a vicious cycle: they are too small to get funding, but they can't get the funding they need to get bigger! **The Out in the South Fund aims to change that – to disrupt the inertia of the status quo.** By providing capacity-building support for Southern LGBT organizations, the fund will help these organizations grow incrementally and escape the vicious cycle. And by pooling funds from multiple sources – national and local – and then leveraging those funds to foster local philanthropy, we can broaden the base of funding and create a larger pie.

## HELP MAKE **THE OUT IN THE SOUTH FUND** A REALITY

National and Southern funders are committing resources to make **The Out in the South Fund** a reality, with the first round of grants projected to be distributed in late 2015. Founding supporters of the Fund agree to make a minimum annual commitment for at least two years:

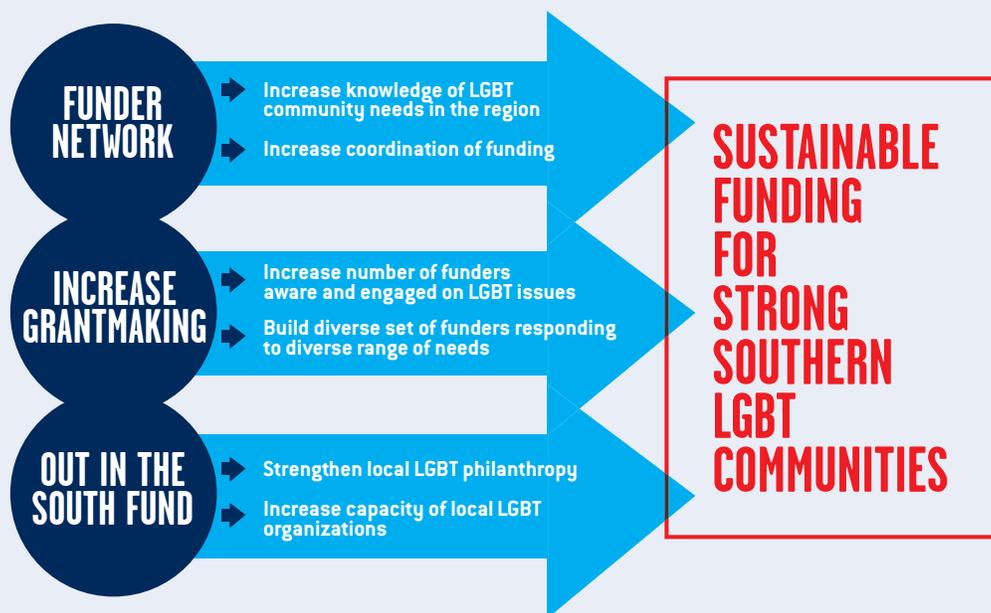
- **Minimum annual investment:**
  - **NATIONAL FUNDERS:** minimum of \$100,000/year for at least 2 years
  - **SOUTHERN FUNDERS:** minimum of \$50,000/year for at least 2 years
  - **INDIVIDUAL DONORS:** minimum of \$25,000/year for at least 2 years

# ORIGIN STORY AND THEORY OF CHANGE

The idea of a Southern LGBT initiative was born in 2013 at OutGiving, a biennial conference of LGBT donors hosted by the Gill Foundation. A group of LGBT donors with Southern roots convened a conversation to discuss the dire lack of philanthropic resources for Southern LGBT communities. They found that many others shared their love and concern for LGBT communities in the South, providing a springboard for a larger group of funders to explore the potential for collective action.

Over the course of nearly two years, Funders for LGBTQ Issues conducted research and facilitated a series of conversations with funders and movement leaders to better understand the needs and opportunities for funding LGBT communities in the region. This process was driven and led by the LGBT Southern Funding Project Steering Committee, a diverse group of national and Southern funders. Their research and discussions identified several critical needs and opportunities: (1) the need for capacity-building of Southern LGBT nonprofits; (2) the importance of building sustainable funding streams for LGBT issues in the South; and (3) the unique value of long-term relationship-building among both funders and nonprofit leaders.

With these needs and opportunities in mind, the committee developed a three-pronged strategy for increasing the scale and impact of funding for LGBT communities in the South. This bold five-year ***Out in the South Initiative*** is being launched in 2015 by Funders for LGBTQ Issues with the support and partnership of several national and regional funders. Contact us to learn more about how you and your foundation can be part of the growing movement to support LGBT communities in the South.



**VISIT [WWW.OUTINTHESOUTH.ORG](http://WWW.OUTINTHESOUTH.ORG) FOR MORE INFORMATION AND TO GET INVOLVED!**

## LGBT SOUTHERN FUNDING PROJECT STEERING COMMITTEE

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**Rebecca Fox**  
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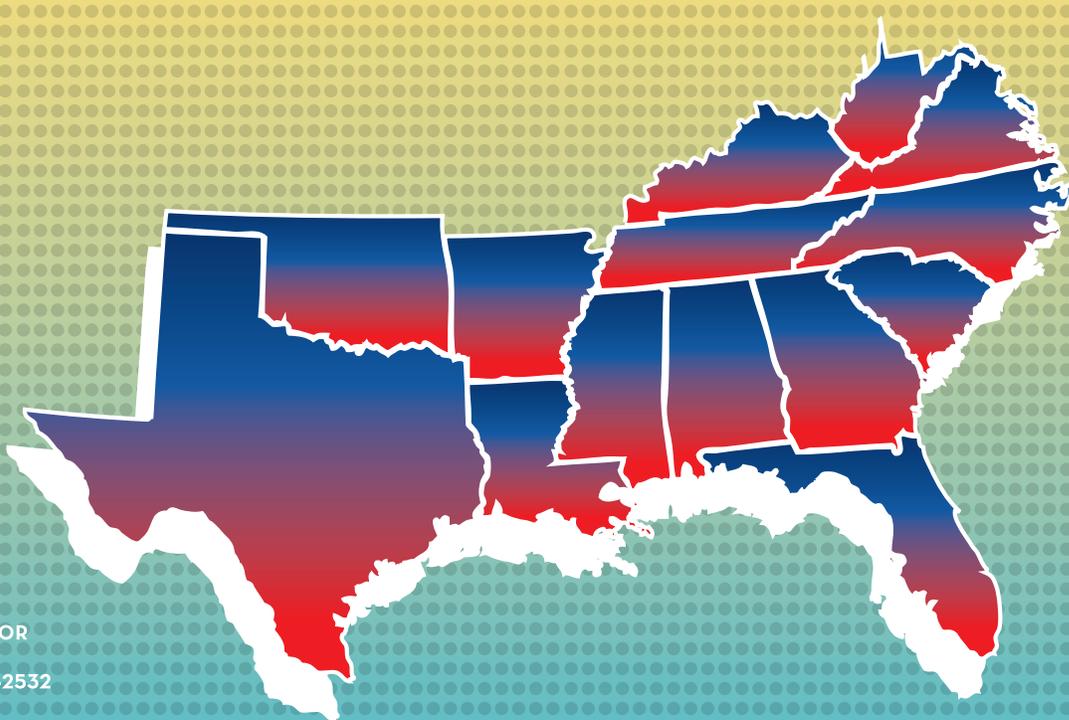
**Tim Sweeney**  
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# FUNDERS FOR LGBTQ ISSUES

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## MISSION

Funders for LGBTQ Issues works to mobilize the philanthropic resources that enhance the well-being of lesbian, gay, bisexual, transgender and queer communities, promote equity and advance racial, economic and gender justice.

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