



GROWING LGBT PHILANTHROPY  
IN PARTNERSHIP  
WITH COMMUNITY FOUNDATIONS  
*A Report to the Field*

Jacksonville, Florida  
Summer 2014

This report was prepared by KBT & Associates, Jacksonville, Florida, with the generous support of the Chartrand Family Fund at The Community Foundation for Northeast Florida.

## INTRODUCTION

Today's world is filled with examples of significant human change. Only 18% of adult Americans are smokers today, the lowest number in decades.<sup>1</sup> The number of teenagers who are drinking and driving dropped by 54% in the past two decades.<sup>2</sup> Young working women today make more money relative to men their age than their mothers and grandmothers did, earning 93% of the average hourly wage of men the same age.<sup>3</sup> Adults with disabilities find a host of opportunities open to them that were unthinkable in 1990 -- today, workers with disabilities make up 19.5% of the U.S. workforce.<sup>4</sup> And 19 states and the District of Columbia have declared same-sex marriage to be legal -- a dramatic change from just five years ago.<sup>5</sup>

While our society still faces innumerable challenges, we know that people do change -- both in attitude and behavior.

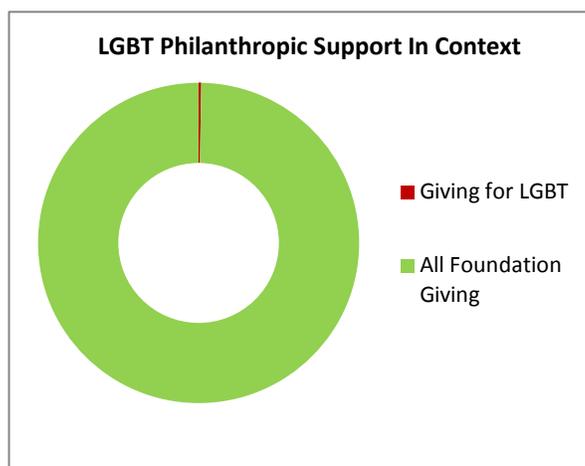
Philanthropy and the independent sector that it supports are frequent drivers of these changes, through their support of and work in the education, encouragement and advocacy that helps to shift long-held practices, policies and laws. The Foundation for a Smokefree America, Mothers Against Drunk Driving, the National Women's Law Center, the National Disability Rights Network -- all work for change and receive critical support from philanthropies that recognize the importance of these changes.

And what about the work to provide a more just world for those who identify as lesbian, gay, bisexual and transgender? What about LGBT philanthropy? If we stand for equality of opportunity and inclusion for all, regardless of sexual orientation or gender identity, is philanthropy standing with us?

Yes, but it is a thin line.

Grantmaking foundations provide about \$134 million annually in support of lesbian, gay, bisexual and transgender issues and organizations.<sup>6</sup> While that sounds robust, it is miniscule in the context of the \$50.9 billion that is all foundation giving.

Only 25 cents out of every \$100 in foundation giving goes to support LGBT issues and organizations.



<sup>1</sup> Centers for Disease Control, 2012, National Health Interview Survey.

<sup>2</sup> Centers for Disease Control, Vital Signs: Drinking and Driving Among High School Students Aged ≥16 Years — United States, 1991–2011.

<sup>3</sup> 10 Findings About Women in the Workplace, Pew Research, December 2013. [www.pewsocialtrends.org](http://www.pewsocialtrends.org)

<sup>4</sup> U.S. Department of Labor, March 2014; the Americans with Disabilities Act was passed by Congress in 1990.

<sup>5</sup> As of Dec. 31, 2013.

<sup>6</sup> 2012 Tracking Report, Funders for LGBT Issues.

The line is even thinner when we look specifically at the South. There, *less than a penny* of every \$100 in national foundation giving supports LGBT issues and organizations.

The South is home to one third of LGBT adults yet receives only 3-4% of LGBT funding. While foundations invest \$5.78 per LGBT adult nationwide, the investment is but \$1.71 per LGBT adult in the South.<sup>7</sup>

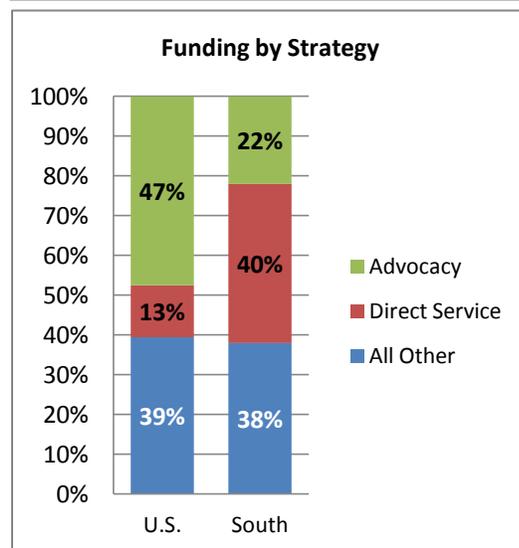
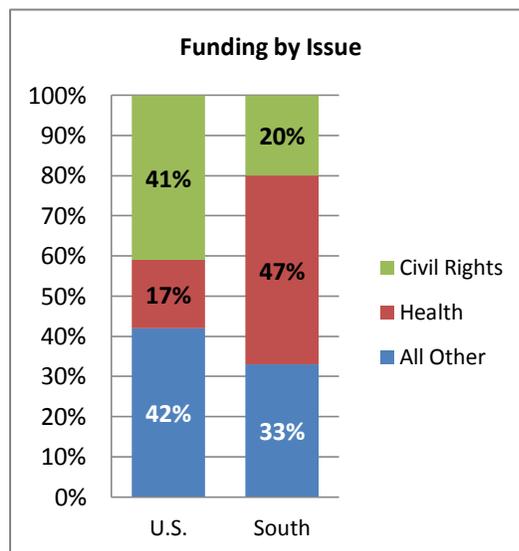
What funding does come to the South is focused on health issues (47%) and the strategy of direct service (40%). Nationwide, by comparison, the bulk of LGBT funding is focused on civil rights issues (41%) and the strategy of advocacy (47%).

It is worth noting that among the roster of states recognizing same-sex marriage, not a single one is in the South.<sup>8</sup>

Philanthropy, of course, brings much more than cash money to the table. Philanthropy has the power to bring people together. Philanthropy is seen as a "neutral convener," providing a safe space for what can sometimes be awkward or messy conversations. Smart philanthropies have well-developed networks that can be shared. They have knowledge and access to intellectual resources. And they have the potential to lead, to step out on an issue, to demonstrate courage.

Philanthropy is an important partner in efforts to move the LGBT community forward. Nowhere has that been more evident than in Jacksonville, Florida -- a sprawling southern community often said to be located in the "buckle of the Bible belt."

There, in three short years, LGBT philanthropy has been seeded, birthed and nurtured. Jacksonville's experience shows what is possible -- even in the South -- with planning, deliberation and the right partners and leaders.



<sup>7</sup> Out in the South, Funders for LGBT Issues; South defined as 14 states (Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, Oklahoma, North Carolina, South Carolina, Tennessee, Texas, Virginia, West Virginia).

<sup>8</sup> States recognizing same-sex marriage are: California, Connecticut, Delaware, Hawaii, Illinois, Iowa, Maine, Maryland, Massachusetts, Minnesota, New Hampshire, New Jersey, New Mexico, New York, Oregon, Pennsylvania, Rhode Island, Vermont, Washington and the District of Columbia. On July 17, 2014, Florida Chief Circuit Judge Luis Garcia struck down the state's ban on marriage for same-sex couples in state court. Florida Attorney General Pam Bondi appealed, which immediately stayed the ruling.

## THE JACKSONVILLE STORY

### *The Landscape in Jacksonville*

Jacksonville sits in the far northeast corner of Florida, tucked against the Atlantic Ocean to the east and just south of the Georgia border. Its topography of coastal marshes, forests of pine and live oaks and climate that sees at least one hard freeze most winters makes it more reminiscent of the Carolina low country than semi-tropical Florida. Its people, too, seem more from the Deep South than South Florida, lacking the international flavor and Latin influences common to the lower part of the state.

It is a big place -- 918 square miles, a larger chunk of real estate than any other city in the Lower 48. And it is all one place (more or less<sup>9</sup>) with the City of Jacksonville and Duval County having consolidated their governments in 1968.

Despite this seemingly progressive approach to governance, Jacksonville is a decidedly conservative community. It is a community heavily influenced by the military -- home to two major Naval bases and, including its suburbs, home to thousands of military veterans. Voters supported Mitt Romney in 2012 and John McCain in 2008. Of those who belong to a faith community or attend services regularly, 56% identify as evangelical Protestant and 16% as Catholic.<sup>10</sup> First Baptist Church in Jacksonville, the third largest church in the Southern Baptist Convention, occupies 11 square blocks of downtown Jacksonville and is reported to have more than 25,000 members with average Sunday worship attendance of 7,500.

Jacksonville is the only major city in Florida to offer no legal protections to those who face discrimination arising from sexual orientation or gender identity. Twenty-six other Florida cities and counties have passed ordinances prohibiting discrimination in employment and other areas based on sexual orientation and/or gender identity. Jacksonville has not.

Advocates attempted in 2012 to amend the city's Human Rights Ordinance to include protections from discrimination based on sexual orientation and gender identity. Though a broad alliance of community leaders supported the measure, Jacksonville City Council quickly struck the gender identity protections from the proposed legislation and ultimately defeated the entire measure 10-9.

Amidst this less-than-supportive environment, however, LGBT-friendly institutions have demonstrated strength and innovation.

The 16,000-student University of North Florida, located in Jacksonville's suburbs, is one of only two universities in Florida with a full-time staffed LGBT Resource Center<sup>11</sup>. The University's non-discrimination policy prohibits discrimination on the basis of sexual orientation and gender identity/expression. The University offers domestic partner benefits that include a stipend to offset the cost of health insurance for same-sex partners of university employees. The University's president has been an outspoken advocate for expansion of the local Human Rights Ordinance.

---

<sup>9</sup> Not included in consolidated Duval County/Jacksonville are three beach communities -- Atlantic Beach, Neptune Beach and Jacksonville Beach -- and the rural community of Baldwin in western Duval County.

<sup>10</sup> 2010 U.S. Religious Census: Religious Congregations & Membership Study, sponsored by the Association of Statisticians of American Religious Bodies.

<sup>11</sup> The other is the University of Florida in Gainesville.

The nonprofit JASMYN (Jacksonville Area Sexual Minority Youth Network) began in 1994 as a small community nonprofit and has grown to become, in many ways, the anchor community institution for the city's LGBT community. Though it focuses on services to youth, it is recognized as a leading source of knowledge and information on a broad swath of LGBT related issues.

And Jacksonville's corporate community, specifically local operations of large national companies, is a champion of the LGBT community. From financial institutions and insurers to transportation companies, these large employers long ago recognized the benefits of inclusive and welcoming workplaces. Their experiences and perspectives were in part responsible for the Chamber of Commerce supporting the HRO amendment in 2012.

The moral of this story: even in a place that on the surface seems unwelcoming to lesbian, gay, bisexual and transgender individuals, there can be a vibrant and robust LGBT community with strong institutional support.

### *Philanthropic Leadership in Jacksonville*

One of the largest philanthropic institutions in Jacksonville is The Community Foundation for Northeast Florida. With assets of about \$295, it is both the largest -- and the oldest -- community foundation in the state. It benefits from a network of sophisticated donors who have established substantial funds at the Foundation and who understand the ways in which philanthropy can be a strategic lever in communities.



One such donor is Jeff Chartrand, the 30-something son of one of Jacksonville's leading philanthropic families. The Chartrand Family Fund at The Community Foundation focuses much of its philanthropy on early childhood education, public education reform and social and emotional health. But a portion of Jeff's philanthropy is dedicated to supporting Jacksonville's LGBT community.

Jeff Chartrand's goal in 2011 was to launch an LGBT fund at The Community Foundation that would benefit Jacksonville. But experience had taught Jeff that it was not enough that he wanted such a fund and had access to capital to seed it. For an LGBT fund ultimately to be successful:

- It needed to be driven by the community, not by a single individual;
- It needed to have a focus; that is, the Fund needed to articulate the types of organizations and/or activities in which it would invest;
- Its organizers would need to take their time and build the support and knowledge necessary to give the new fund a solid footing from the outset.

When Chartrand approached Community Foundation President Nina Waters with his concept, her first reaction was, "This is not an area that we know a lot about." But she was undeterred. The Community Foundation had experience entering new fields of work, learning about those fields and developing expertise. In fact, the Foundation had multiple strengths born of experience that positioned it well for this new endeavor:

- The Community Foundation had extensive experience with collaborative giving and giving circles. The Community Foundation supported in 2001 the establishment of the Women's Giving

Alliance, a giving circle that pools members' contributions in support of women and girls in Northeast Florida. WGA now has more than 330 members, has made grants of \$3.6 million to the community and has established a \$2 million endowment. While the LGBT fund would not be structured exactly like WGA, it would benefit from the Foundation's experience in launching a collaborative giving entity.

- The Community Foundation had experience with structured community learning. As part of its Quality Education for All initiative, the Foundation in 2005-2007 hosted the Forum on Quality Education, a 22-month effort that brought 27 community leaders together monthly to learn about public education in Jacksonville. That community learning model would be critical in developing community support for the LGBT fund.
- The Community Foundation also had experience -- going back more than a decade -- with "reflective practice," a process that blends inquiry and discovery with strategic planning. Reflective practice at its best requires a leap of faith to trust the process, and the Foundation had made this leap many times before, with good results.
- Finally, The Community Foundation's mission is donor-focused. That is, the Foundation seeks to help its donors fulfill *their* philanthropic goals, not the Foundation's. This gives the Foundation the flexibility to explore many philanthropic opportunities that might be overlooked in a more institution-driven model. This donor-focus would prove to be important as the Foundation considered moving forward with this work.

In short, Jacksonville in 2011 had a knowledgeable individual donor who could be the driving force behind creation of an LGBT fund, and an experienced philanthropic institution that could provide a neutral stage on which the community could explore the idea.

### *Phase I -- The LGBT Exploration Committee*

In 2011, The Community Foundation had little knowledge about Jacksonville's LGBT community and LGBT philanthropy in general. The donor had moved to San Francisco, seen the impact of LGBT philanthropy there, connected with national LGBT funders and become very knowledgeable about the field and about the dearth of LGBT philanthropy in the South. But the donor's knowledge of Jacksonville's LGBT community was limited.

To bridge this knowledge gap, the Foundation chose to use the community learning model deployed in the Quality Education for All initiative and establish an LGBT Exploration Committee, which would accomplish multiple goals:

- Build knowledge about the LGBT community in Jacksonville;
- Build a cadre of people who share common knowledge about the LGBT community in Jacksonville;
- Provide knowledge that could inform decisions about LGBT philanthropy in Jacksonville;
- Establish the beginnings of a network that can identify donors to an LGBT fund.

The ultimate task of the committee was to advise The Community Foundation whether or not an LGBT fund at The Community Foundation would have merit and, if so, how it would add value to the

community. As a side benefit, the work of the committee would also inform other grantmaking efforts of the Foundation.

**WHO DID THE WORK:** The Community Foundation engaged a consultant who was familiar with the community learning model to execute the LGBT Exploration Committee. The consultant reported to Community Foundation staff. The costs of the Exploration Committee were underwritten by the donor.

**RECRUITING COMMITTEE MEMBERS:** The consultant, donor and foundation staff agreed that the ideal committee would be comprised of gay and straight individuals from multiple sectors, of varying ages and backgrounds. To identify prospects, the consultant turned to two wise leaders in the LGBT community -- the CEO of JASMYN and the founder of the local Parents and Families and Friends of Lesbians and Gays (PLFLAG) chapter, both of whom had deep knowledge of the community and its members. Through an afternoon brainstorming session, they identified about 40 prospects. Invitations were extended under The Community Foundation's name and 21 individuals accepted. They represented the public health department, the public school system, the Area Agency on Aging, Legal Aid, higher education, local nonprofits, the faith community and the business community (see Appendices for the letter of invitation).

**SETTING THE LEARNING AGENDA:** The previous experience with community learning provided some important guides when it came to setting the learning agenda:

- Share the community's history around the issue; (See Appendices)
- Share facts and data; do not rely on perceptions;
- Invite guest speakers who can share expertise;
- Empower and engage the participants;
- Share a meal;
- Remember that people really do like to learn.

Based on those guides, specific areas for learning were identified:

- The history of the local LGBT community<sup>12</sup>;
- The law -- ensuring that all participants understood the law as it applied to LGBT individuals in the United States, in Florida and in Jacksonville;
- Policies & practices -- how the business sector responded to LGBT individuals in the workplace; how public schools responded to the needs of LGB youth;
- Where LGBT advocacy was across Florida;
- How other communities had supported and/or advocated for LGBT individuals.

In addition, the topic of philanthropy was an important part of the learning agenda. If committee members were to make an informed recommendation about a future LGBT fund, they needed to understand the basics of philanthropy, the roles of donors, funders, grantmakers and grantees, and how community foundations work. They also needed to explore how LGBT philanthropy was structured in other communities.

**STRUCTURING THE LEARNING EXPERIENCE:** Members of The Exploration Committee convened for the first time in June 2011 for the express purpose of meeting one another, learning about their mission and

---

<sup>12</sup> Because there was no written history of the local LGBT community, the committee used its collective knowledge to build a timeline of key events.

reaching consensus on the schedule. Formal meetings did not begin until September 2011 and continued monthly (with the exception of December) through May 2012. Meetings ran from 11:30 a.m.- 2 p.m., with lunch provided. With one exception, all meetings were held at The Community Foundation offices.

**MANAGING EXPECTATIONS:** When a foundation convenes a group of individuals to explore a particular topic there is an unspoken expectation that the foundation will make an investment in that area. From the outset, the consultant and foundation staff made it clear that The Community Foundation's role was *not to be a funder* of LGBT organizations in Jacksonville but to *provide a vehicle that enabled local donors to fund LGBT organizations if they wished*. The committee was reminded repeatedly that their work was being supported by a donor -- not by The Community Foundation. These distinctions helped to made it clear that the future of LGBT philanthropy locally rested with the community.

**MAINTAINING DONOR ANONYMITY:** Throughout the life of The Exploration Committee, the donor's identity was not revealed. The donor was not present at meetings of the committee. The consultant and staff gave the donor progress reports at regular intervals. At the conclusion of the process, the donor attended a final meeting of the committee and received their recommendations.

Having an "absentee donor" ensured that the committee's work was an honest reflection of members' ideas and not skewed to satisfy a particular individual. This became important when the time came to capitalize the fund, as prospective contributors could see clearly that the recommendations came from the community.

**OUTCOMES:** The Exploration Committee recommended in favor of establishing an LGBT fund at The Community Foundation. But the committee's recommendations went much further. They recommended that The Community Foundation:

- Set an example and provide leadership, within the scope of its mission, in support of LGBT issues in the community;
- Nurture and grow LGBT-supportive philanthropy in the community;
- Use those philanthropic resources to strengthen the LGBT community in order to positively impact the surrounding community. (See Appendices for complete text of recommendations.)

Moreover, the committee divided the recommendations into stages -- early stage, mid stage and mature stage activities -- in recognition of the need to build upon achievements.

Committee members presented their recommendations to the donor, and subsequently to The Community Foundation Board of Trustees, in June 2012. The staging of the recommendations enabled the Foundation to respond positively to early stage recommendations -- such as examining its own policies to ensure they were welcoming to LGBT individuals -- while taking time to determine the best response to other recommendations.

### **Exploration Committee Recommendations**

#### **Early Stage:**

- ✓ Examine, and if appropriate amend, Community Foundation policies to ensure that they are fully inclusive.
- ✓ Require Foundation grantees to have in place policies that are fully inclusive.
- ✓ Ensure that LGBT-supporting organizations and leaders are invited to participate in all Foundation activities.

#### **Mid-Stage:**

- ✓ Identify and cultivate donors with the potential to support an LGBT Fund. Assemble donors, practitioners and community leaders to articulate the mission and focus of the fund and advise the Fund.
- ✓ Work with existing programs to raise awareness of and attention to LGBT issues.
- ✓ Collaborate with the Nonprofit Center of Northeast Florida and corporate diversity resources to enhance nonprofit leaders' knowledge and skills to provide a supportive and welcoming workplace.
- ✓ Convene groups of service providers working in common areas to build understanding of strategies for effectively meeting the needs of LGBT clientele.

#### **Mature-Stage:**

Using the resources of the LGBT Fund, support:

- ✓ Capacity building of LGBT-serving organizations;
- ✓ Leadership development for emerging and existing leaders in the LGBT community.
- ✓ Communication activities to build community knowledge and understanding
- ✓ Establishment of an independent council to advocate for full human rights to all members of the LGBT community.
- ✓ Development of a physical center for the area's LGBT community.

### *Phase II -- Fulfilling the Mandate*

During the next year, The Community Foundation and the donor worked quietly behind the scenes to move the agenda forward.

Foundation President Waters spent time consulting with her colleagues in the field, learning about other community foundations that had LGBT initiatives and how they were structured, managed and positioned in their communities. She spent time learning the terrain, understanding the varying concerns of gay men, lesbians and LGBT-led families. She reached out to some prospective donors, and worked with the donor, Jeff Chartrand, to identify others -- seeking to determine if there was a critical mass of donor prospects in the community to support an LGBT fund.

Through these early contacts, Waters said, she focused a lot on just building trust with individuals. Many of the individuals with whom she spoke were not out professionally, only in their personal lives, so they were cautious. Almost all were totally new to The Community Foundation -- had no experience with it, had no knowledge of it. By being deliberate and forthright, and letting one individual make introductions to another, Waters and the Foundation began building a network of those who identify as LGBT and their allies.

At the same time the Foundation followed the Exploration Committee's recommendation and reviewed its own policies and procedures -- and discovered that some modifications were in order if the Foundation was to be clear that it did not discriminate based on sexual orientation or gender identity. The Foundation amended its equal opportunity policy to include sexual orientation and gender identity and amended site visit protocols to be more sensitive to all forms of diversity.

During this time, Waters and Chartrand decided they needed a much better handle on specific community needs. If an LGBT fund was established, what would it fund? The answer to this question was important not only to the fund's future grantmaking, but to donor solicitation. Prospective donors are more likely to respond positively to a fund that "knows where it's going," -- that is, can say with specificity "this is what we hope to accomplish."

In late 2012, Chartrand and the Foundation engaged a researcher to examine community needs, resources and gaps in four areas:

- Supports for LGBT elders;
- Supports for LGBT individuals in the workplace;
- Supports for LGBT youth and LGBT-led families;
- Supports for LGBT individuals in faith communities.

The four areas were selected for very practical reasons. Two of the community's strengths were its work with LGBT youth through JASMYN, and its work with LGBT elders through ElderSource, the local Area Agency on Aging. The campaign around amending the Human Rights Ordinance drove interest in the workplace. And the region's faith-oriented culture suggested a look at faith communities.

The researcher prepared a report for each area that provided background on the issue, described the local landscape and activities ongoing in the community, and identified opportunities (or lack of opportunities) for philanthropic investment. As before, the donor underwrote the cost of this research. (For copies of the four reports, visit [www.lgbtnefl.org](http://www.lgbtnefl.org))

By summer 2013, the Foundation's quiet, background work was concluded and the community reports were well under way. Waters and Chartrand determined it was time to take the initiative to a more public level.

**FLOATING THE CONCEPT:** In July 2013, Chartrand hosted an event at his Jacksonville home to introduce the idea of an LGBT fund to a select group of individuals and prospective donors. Invitations were issued by Chartrand personally, though he was clear about his affiliation with The Community Foundation. At this gathering, Chartrand explained the concept of an LGBT fund to his guests, and Waters (who attended along with key Foundation staff) explained the role The Community Foundation could play in facilitating such a fund. Chartrand said his goal was to raise \$1 million over five years for the fund, and encouraged those who were willing and interested to become engaged in the effort, either through contributions or participation in a "steering committee" that would guide development of the fund.

While there was robust, energetic and positive conversation that evening about the benefits of such a fund, few volunteers emerged, either as donors or leaders. The idea had been floated successfully, but implementation would require much more work.

**CREATING THE FUND:** Following the initial gathering at the Chartrand home, Waters and Chartrand began reaching out individually to key persons who had indicated interest. Following onto these personal calls, a second meeting was held at Chartrand's home with the seeds of what would become the steering committee. It was through this session that the fund began to take shape and have its parameters formed. The participants recommended that the fund would:

- Not have an endowment initially; the fund needed time to grow and become established.

- Accept donations in any amount but only donors of \$2,500 a year or more could have a voice in grant decisions.
- Encourage multi-year contributions/pledges to provide continuity of income.
- Consider multi-year grants to help organizations work more strategically.
- First seek contributions from the LGBT community, while always welcoming contributions from anyone. "We've got to show that we are willing to support this ourselves," said one member.

During 2014, steering committee members wrestled with decisions on the parameters of the fund and were forced to become fast students of philanthropy. Virtually none had any experience with formal giving or with philanthropy. Though they were generous, they generally had no experience with grantmaking or collective giving and did not see themselves as "donors." Waters and Foundation staff spent time with the committee teaching the traditions of philanthropy, "philanthropy 101" and "grantmaking 101" so committee members would be prepared to be wise stewards of contributed funds.

This training also benefitted the committee members as they hosted two donor cultivation events in two different Jacksonville neighborhoods, inviting prospective donors to learn about the fund, learn about the community research and make a contribution or pledge to the fund.

All of these activities took place in a four-month period early in 2014.

In January, the steering committee selected its focus areas, choosing to focus on supporting organizations that provided services to elders, services to youth and services to LGBT-led families.<sup>13</sup>

By the end of April, after two donor cultivation events, the fund had multi-year contributions/pledges of \$342,000 from 42 individuals. That enabled the fund to budget \$100,000 for first-year grantmaking.

Grant proposals were reviewed during the summer and awards announced in fall.

<b>First Year Timeline</b>	
January	Steering Committee is organized, affirms terms for fund structure, governance, membership and grantmaking.
February	Steering Committee studies the Four Traditions of Philanthropy
March	Steering Committee studies Grantmaking Basics Donor Cultivation event #1 Preliminary grant applications received
April	Steering Committee discusses preliminary applications Donor Cultivation Event #2
May	Steering Committee sets grants budget Steering committee receives full grant applications
June/July	Steering Committee members assist with site visits and proposal reviews for grant applications
August	Steering committee finalizes slate of grants to present to membership
September	All member meeting to approve final slate of grant awards.
October	Announce grant awards Steering committee sets timetable for next year

By year end 2014, the LGBT Community Fund had awarded \$100,000 in grants in its first year, had begun the annual campaign for its second round of grants, and had established its own website ([www.lgbtnefl.org](http://www.lgbtnefl.org)) and presence in the community.

<sup>13</sup> The committee determined that there were insufficient opportunities to have collective impact on the workplace, and that there were no practical investment opportunities in the faith community beyond individual congregations.

Expectations were that a new round of donor cultivation/annual giving requests would occur in the early part of 2015, with the grants budget set by May, proposals reviewed over the summer and awards made in the fall.

### **Keeping the Board On Board**

Few organizational initiatives can be successful without the support of the organization's board of directors. When the subject has high potential for controversy, board engagement is even more critical.

The Community Foundation for Northeast Florida staff was very sensitive to its board's engagement around development of the LGBT Fund. President Nina Waters was aware that her board members had diverse views on the subject and she wanted to be respectful of those views, but continue to move the work forward.

Foundation Trustee Deborah Pass Durham chaired the Program & Initiatives Committee during this period and she recalls that staff communication with her committee was open, honest and clear. The board was apprised of the work early on but, because there was along learning process, the topic was not at the forefront of the agenda for a while.

Once it moved to the forefront, differences emerged, she said.

"It wasn't all rosy. There was a lot of dialogue and when people had opposing views or didn't like things that's when we worked to keep things on task."

The key, she said, was focusing on the mission of The Community Foundation:

"The best way to keep your board calm and informed when you are working on charged subjects -- always bring it back to the question of mission -- are we fulfilling the mission of our organization?"

"This is the mission of The Community Foundation -- to help donors achieve their philanthropic goals and build philanthropic resources. I think that's what kept all of us guided and moving in the right the direction."

## THE WINS AND LESSONS LEARNED

The benefits of establishing the LGBT Community Fund extend far beyond the obvious availability of grant dollars to support LGBT-serving organizations.

- The Fund has increased philanthropic giving among members of the LGBT community (and, in some cases, their straight allies). Of the initial 26 member/donors to the fund, 18 made five-year gifts of \$10,000 or more.
- The Fund's leaders and investors have gained a deeper understanding of the role of philanthropy in communities, adding to the stock of "community investors" in Jacksonville.
- Through development of the fund, The Community Foundation has identified opportunities for community investment that might otherwise have been overlooked.
- Because of the lessons learned through development of the fund, Community Foundation staff are more attuned to inclusion in all of their activities.
- Development of the fund has allowed The Community Foundation to widen its circle of stakeholders. Of the fund's initial 42 donors, only 18 had previously had any dealings with The Community Foundation.
- Development of the fund has increased the body of knowledge about the local LGBT community.
- The fund's presence adds to the stature and luster of the local LGBT community.

These gains, of course, do not come without the inevitable ups and downs on new ventures. When asked about the key lessons learned in the course of developing the LGBT Community Fund, Community Foundation President Nina Waters and Vice President Programs, Kathleen Shaw, shared the following:

**There is power in asking the question.** Too often we refrain from asking a question because we anticipate a negative response, or because we think our idea will not gain traction. But asking the question plants the seed of the idea. Even when initial reactions are discouraging, the seed of the idea has been planted and oftentimes it will go on to blossom. Had the donor not asked questions about LGBT philanthropy in Jacksonville, the topic may have remained "off the radar" for years to come.

**Having a key local donor is critical.** The process of developing a new fund is time consuming and not without expense. Whether using staff or consultants, there are labor costs as well as costs for convening and research. Having a donor -- whether an individual or an institution, such as a foundation or giving program -- to cover these costs is critical. And that donor needs to have roots in the local community, to give the initiative local legitimacy.

**The donor should be willing to contribute dollars and social capital.** Having the bills covered is a good thing. But the donor needs to have local credentials that can help to bring others to the table. The donor can be key to opening doors and facilitating the connections that are important to building a network of individuals to support the effort.

**Engage the people who are most affected by the issue.** While it is important to have a range of perspectives, it also is important to hear clearly from those who are affected. The Exploration Committee brought together gays and straights, but in virtually every case, the individuals dealt with LGBT-related issues routinely, whether in the school system, the health system, the legal system or other systems and communities.

**Allow ample time to do the work; exercise patience.** Learning, building relationships, finding the right approaches requires time. These are activities that are best not rushed.

**Don't get ahead of your board.** Keep your board members informed of the work along the way, just as you would with any new initiative. Have a board member participate in the learning process. Designate a board member to serve as a liaison between the work and the board. Communication across levels is key.

**Teach philanthropy.** Oftentimes, when foundations begin to work in a new arena, the players in that arena have little or no experience with giving, with philanthropy or with organized philanthropic institutions, such as community foundations. Some of the most important learning that occurs may not be about the subject at hand, but about the values, practice and processes of philanthropy. Those lessons not only will help inform the immediate work, they will enrich the communities' knowledge for years to come.

## THE BENEFITS OF COMMUNITY FOUNDATION PARTNERSHIPS

While creation of Jacksonville's LGBT Community Fund was donor-driven and donor-funded, the alliance with The Community Foundation for Northeast Florida was critical to its success.

"Community foundations make excellent partners for this work," said Chartrand. "Obviously, they provide infrastructure and resources to get the work done. But they bring much more than that to the table."

**Community foundations know how to do the work.** They understand philanthropy, they have professional staff and they know how to structure funds and giving circles and other philanthropic mechanisms. "I can't imagine trying to hire consultants, figure out how to structure a fund, bring all these people together and make something happen without the help of a professional organization like The Community Foundation," Chartrand said.

**Most community foundations are donor-focused.** That means their mission is to enable donors, to help donors fulfill their philanthropic ambitions. In short, the donor's idea leads, and the community foundation facilitates. Consequently, less time can be spent "selling" the idea; conversations can move to implementation more quickly.

**Community foundations typically have extensive networks within a community.** Being donor-focused, they are exposed to a wide variety of issues and fields, and have diverse and extensive relationships as a result. This can expedite access across a community and open doors that might otherwise be difficult to enter. "You cannot overstate the value of relationship building," said Vice President Shaw.

**Community foundations make good conveners.** Community foundations are seen as "neutral conveners" and often have extensive experience with community convening, community research and learning and community collaborations. Initiatives that require broad community support can benefit from this expertise.

**Community foundations have built-in philanthropic infrastructure with credibility, reliability and accountability.** A healthy community foundation already is accepting contributions, managing assets, stewarding gifts and investing in the community -- and reporting on these activities publicly. A new philanthropic initiative can rely on the foundation's established reputation to build its credibility.

**Community foundations have a strong national network.** This means they can learn from one another. If a local community foundation encounters a problem or question, it can easily reach out to peers across the country for advice and answers.

## A CALL TO ACTION

In its first year, The LGBT Community Fund at The Community Foundation for Northeast Florida awarded \$100,000 in grants in Northeast Florida. That is a greater philanthropic investment than was made in LGBT issues and organizations in the entire state of Louisiana, or Mississippi, or South Carolina, or the four states of Arkansas, Kentucky, Tennessee and West Virginia combined.<sup>14</sup>

In short, given the current landscape, foundations can have a significant impact on LGBT communities in the South with relatively modest investments.

Moreover, the infrastructure to undergird LGBT philanthropy in the South already exists, in the form of community foundations.

In the 14 Southern states tracked by Funders for LGBT Issues, there are more than 330 community foundations, according to the Council on Foundations. While not all are the size of The Community Foundation for Northeast Florida, there is an abundance with the capacity to support an LGBT fund.

Developing LGBT philanthropy is powerful work. It engages individual donors. It elevates conversations. It drives new philanthropy. It lifts up community organizations.

And, if done wisely, it builds bridges with other philanthropic endeavors.

The goal is not to create a separate pool of money to support a separate group of organizations, but to integrate LGBT philanthropy with mainstream philanthropy and help communities meet the needs of ALL people. Education funders, health funders, social service funders, arts funders - all can also be LGBT funders. Recognizing the diversity of people that they serve and developing the cultural competency to serve all people makes funders smarter, more robust and more effective. All to the benefit of the broader community.

Our experience in Jacksonville shows that this work can be done, even in the challenging place we call home.

We encourage you to do it in the place you call home.

---

<sup>14</sup> 2012 Tracking Report, Funders for LGBT Issues.

## **APPENDICES**



May 20, 2011

Name  
Address  
Address  
City State Zip

Dear NAME

The Community Foundation in Jacksonville is exploring the merits of creating a philanthropic fund to benefit the gay, lesbian, bisexual and transgender community in greater Jacksonville. With this letter, we invite you to be a part of that process.

One of the most important components of any effective philanthropic endeavor is the work that is done on the front end -- developing knowledge about the issue or field in which one wishes to make a philanthropic investment, and identifying the ways in which philanthropic dollars and resources can best impact that issue or field.

To help The Community Foundation build knowledge and consider strategies, we are assembling an Exploration Committee to help us assess the current landscape, identify best practices in other communities, and determine opportunities for possible philanthropic support in our community. The committee will look at existing research as well as community infrastructure, policies, practices and environmental factors that influence the lives of GLBT citizens and the broader community.

You have been recommended to us as one who has knowledge and/or experiences that will enrich our learning and broaden our understanding. We invite you to serve on the Exploration Committee.

As a member of the Exploration Committee, you will be expected to participate in a series of nine meetings of not more than 3 hours each to be held between June 2011 and May 2012. A tentative schedule of meeting dates is attached. Meetings will be held during the day, at or near The Community Foundation offices at 245 Riverside Avenue in Jacksonville.

The work will be led by Mary Kress Littlepage, a private consultant based in Jacksonville with extensive experience in philanthropy and community research. Community Foundation staff will provide additional resources.

The first meeting will be Tuesday, June 21, from noon-1:30 p.m. at The Community Foundation offices. Lunch will be provided.

Please indicate your willingness to participate before June 10 using any of the following methods:

Contact Mary Kress Littlepage at  
Email Mary Kress Littlepage at

904-384-8496  
mekl@comcast.net

Contact Kathleen Shaw at  
Email Kathleen Shaw at

904-356-4483  
kshaw@jaxcf.org

We greatly appreciate your willingness to consider this invitation and look forward to your active participation in this work.

Sincerely,

Kathleen Shaw  
Program Director

Mary Kress Littlepage  
Consultant

**GLBT Exploration Committee  
Tentative Meeting Dates**

JUNE 21, 2011  
Noon-1:30 p.m.

SEPTEMBER 20, 2011

OCTOBER 17, 2011

NOVEMBER 15, 2011

JANUARY 17, 2012

FEBRUARY 21, 2012

MARCH 20, 2012

APRIL 17, 2012

MAY 15, 2012

## **JACKSONVILLE'S LGBT HISTORY**

### **A Long Time Ago**

- 1528 – Alvar Nunez Cabeza De Vaca reports Native Americans cross dressing in Florida.
- 1566 – Gonzalo Solis De Maras is executed in St. Augustine for being a homosexual, French and Lutheran. This is the first record of an individual being put to death in North America for being homosexual
- 1595 – Francisco De Paeja writes about witnessing homosexuality among the Timucuanos who lived in Northeast Florida
- 1868 – Florida passes original sodomy law, phrased in terms of "crimes against nature"

### **1950s**

- 1956 – Johns Committee (The Florida Legislative Investigation Committee) begins its hearings on communism and other subversive activities in Florida

### **1960s**

- 1961 – The Johns Committee officially expands its investigations into rooting out homosexuality in public education with a focus on UF, FSU, and USF
- 1964 -- Roverta (Bo) Boen opens Bo's Reef bar, one of the earliest and longest standing gay bars in Jacksonville
- 1969 (June) -- Stonewall Riots in New York

### **1970s**

- 1973 (Easter Sunday) – St. Luke's holds its first study group
- 1973 – The American Psychiatric Association declassifies homosexuality as a mental disorder
- 1975 – St. Luke's opens its first church
- 1977 – Anita Bryant begins her *Save Our Children* campaign
- 1977 -- Dade County, Florida voters pass a local ordinance prohibiting discrimination on the basis of sexual orientation. Anita Bryant protests and in June 1977, 69% of Florida voters vote to repeal the ordinance
- 1977 -- Florida Legislature passes a law prohibiting gay adoption
- 1979 -- The Gay Committee of the Jacksonville Human Rights Commission (JHRC) makes a recommendation to study the feasibility of amending the city ordinance to include "sexual preference"

### **1980s**

- 1980 -- The JHRC determines that amending the ordinance to include "sexual preference" is not feasible at the time.
- 1983 -- The first AIDS case is reported in Jacksonville
- 1984 -- The first gay pride celebration is held in Jacksonville

## **1990s**

- 1990 – LGCA (Lesbian and Gay Community Association) is formed
- 1990 – First edition of Out and About in Jacksonville published
- 1991 – Disney Gay Days begin
- 1992 – Jacksonville’s PFLAG chapter opens
- 1992 - AIDS Memorial Quilt visits Jacksonville, more than 10,000 attend
- 1993-1995 -- Diagnoses and deaths from HIV/AIDS among MSM in Duval County hit their peak
- 1993 -- St. John's Horizon House opens, housing for people with AIDS; a collaborative effort of St. John's Cathedral and Memorial Hospital
- 1993 -- BRAIDS Committee forms to raise money for grants to LGBT & AIDS organizations
  
- 1994 -- JASMYN formally established
- 1994 – Jacksonville Gay Chorus formed
- 1995 -- JASMYN awarded first grant from Florida Department of Health & Rehabilitative Services for HIV prevention work with youth
- 1996 -- JASMYN's first support groups are hosted in the Murray Hill Public Library
- 1996 – PFLAG awards its first college scholarships
- 1997 -- Jacksonville Gay Chorus is invited to participate in opening of the Times-Union Center for the Performing Arts
- 1999 – Jacksonville Jaguars Foundation becomes the only NFL team to support LGBT youth with its grant to JASMYN
- 1999 – JASMYN House opens
- 1999 -- Equality Florida holds its first event in Northeast Florida

## **2000s**

- 2000 -- JASMYN hosts city's first gay and lesbian film festival
- 2000 -- First openly transgendered person on Duval County Democratic Executive Committee
- 2001 – Northeast Florida Safe Schools Coalition founded to promote safe schools for all in Northeast Florida
- 2001 – JASMYN hosted the first annual Alternative Gay Youth Prom
- 2001 -- Transgendered activist and JASMYN volunteer, is shot to death December 13 outside of her home in Jacksonville. She had led protests against Winn-Dixie after the company fired a truck driver who admitted he cross-dressed.
- 2002 -- Sexual orientation is included in Duval County Public Schools' hate crimes policy
- 2002 -- Janet Reno, candidate for governor, meets with LGBT community at Fuel Coffee House in 5 Points; considered a first to have a candidate in Northeast Florida reach out to LGBT community
- 2003 -- LGBT residents held meetings to discuss an amendment to the Jacksonville Human Rights ordinance to include “sexual orientation and gender identity.” The committee meets with the JHRC executive director. Nothing further happens.
- 2003 – The U.S. Supreme Court strikes down laws prohibiting sex between same gender couples (Texas v Lawrence).

- 2003 – JASMYN launches the LGBT Youth In Foster Care Task Force with support from Department of Children and Families, Family Support Services, and Jewish Family and Community Services
- 2005 – UNF adds sexual orientation to its nondiscrimination policy
- 2006 -- Cindy Watson appointed to the JHRC as an open lesbian
- 2006 – JASMYN launches the LGBT Youth In Foster Care Task Force with support from Department of Children and Families, Family Support Services, and Jewish Family and Community Services
- 2006 – UNF begins offering soft domestic partner benefits
- 2006 -- UNF establishes LGBT Resource Center on campus
- 2006 -- Christ Church of Peace launches "Know They Neighbor" campaign, identifying supporters of a proposed state constitutional amendment to ban same-sex marriage. Web-based campaign publishes names and addresses of 400,000 Florida residents in 60 counties.
- 2007 -- JCCI Forward sponsors a six- week study, "Out in Jacksonville: The status and impact of the GLBT Community."
- 2007 – JASMYN launches on-site health clinic for youth, in partnership with UF Shands, Department of Pediatrics, and Duval County Health Department
- 2007 -- JASMYN first Coming Out Day breakfast, celebrating LGBT in the workplace
- 2007 -- JASMYN & the UNF LGBT Resource Center launch "Teaching Respect for All" day-long training for teachers.
- 2008 -- Jeffrey Johnston Stand Up for All Students Act passes Florida Legislature, anti-bullying and harassment act
- 2008 -- Duval County School Board adds sexual orientation as a protected category in its non-discrimination policy; also develops anti-bullying policy
- 2009 -- River City Pride cancelled after 25 years
- 2009 -- Northeast Florida LGBT Corporate Roundtable forms

## **2010-2011**

- 2010 -- First Coast Diversity Council adopts Northeast Florida LGBT Corporate Roundtable as its first affinity group
- 2010 – UNF adds health care to its domestic partner benefits
- 2010 – Florida’s ban on gay adoption overturned.
- 2010 – *Queer Questions Clear Answers: The Contemporary Debates on Sexual Orientation*, by Jacksonville author Thomas Serwatka, is published
- 2011 – Rainbow House and OASIS open their doors as two different GLBT community centers in Jacksonville
- 2011 – The Community Foundation in Jacksonville launches the GLBT Exploration Committee to examine whether and how philanthropy can support the area's GLBT community.
- 2011 -- Florida Department of Elder Affairs amends client assessment to include LGBT
- 2011 -- ElderSource targets LGBT elders issues in needs assessment

**TO: The Community Foundation in Jacksonville**  
**FROM: LGBT Exploration Committee**

## **OPPORTUNITIES FOR LGBT PHILANTHROPY IN JACKSONVILLE**

**SUMMARY:** After nine months of learning and deliberation, the members of the LGBT Exploration Committee encourage The Community Foundation in Jacksonville to take steps and initiate activities that will:

- **Set an example and provide leadership, within the scope of its mission, in support of LGBT issues in the community;**
- **Nurture and grow LGBT-supportive philanthropy in the community;**
- **Use those philanthropic resources to strengthen the LGBT community in order to positively impact the surrounding community.**

### **BACKGROUND:**

In 2011, a donor, who requested anonymity, encouraged The Community Foundation in Jacksonville to explore the merits of creating a philanthropic fund to benefit the lesbian, gay, bisexual and transgender community in greater Jacksonville. The donor recognized that among the most important components of any effective philanthropic endeavor is the work done on the front end -- developing knowledge about the issue or field in which one wishes to make a philanthropic investment, and identifying the ways in which philanthropic dollars and resources can best impact that issue or field. To that end, the donor underwrote the costs of convening an LGBT Exploration Committee to look at existing research, community infrastructure, laws, policies, practices and environmental factors that influence the lives of GLBT citizens and the broader community.

A committee of 21 individuals convened first in June 2011, with regular meetings beginning in September 2011. Together they explored the history of Jacksonville's LGBT community; the laws, policies and practices that impact that community; the roles that philanthropy can play in creating change and the ways in which other communities have used philanthropy in support of LGBT issues; and the strengths and needs of Jacksonville with regard to LGBT issues. Among their key findings:

While Jacksonville's LGBT community has made great strides toward becoming fully integrated into community life, it still has many miles to go. There is no better evidence than the current anti-discrimination legislation pending before City Council. Passage of the bill, which would ban discrimination on the basis of sexual orientation and gender identity, will be a major milestone for the LGBT community and its allies. However, Jacksonville will be the last major city in Florida and among the last of its peers nationwide to adopt such an ordinance.

Jacksonville's LGBT community is large and diverse; in fact, the 2010 Census reports that Jacksonville has among the largest populations of gay parents in the United States. LGBT individuals are present across the workforce and in all aspects of community life – indeed, they

are part of the fabric of this community. They are, however, often invisible – to others and to themselves.

There is limited community infrastructure to support LGBT individuals and families in Jacksonville. While many congregations may be quietly tolerant of LGBT members, only a few congregations openly welcome and minister to LGBT members. There is one nonprofit organization – JASMYN – that works with LGBT youth, but none that addresses the concerns and needs of adults. While the LGBT community has a rich history of organization and initiative formation, these efforts have generally been champion-driven and not institutionalized, thus less likely to be sustained.

Jacksonville has many corporate citizens whose workplaces model exemplary policies and practices with regard to LGBT individuals and families. However, these behaviors are not practiced with consistency across the business community, or across the government and nonprofit sectors. Most frequently, positive change in behavior toward LGBT individuals is driven by an individual within a business or organization who motivates others.

The recommendations contained in this report are informed by those findings as well as by the members' local knowledge, individual expertise and personal experiences.

## **RECOMMENDATIONS:**

The GLBT Exploration Committee recognizes that The Community Foundation in Jacksonville has the capacity to do much more than make grants. As a strong community-based philanthropic organization, it also can provide leadership in the community and, through its actions, influence the actions of others.

The GLBT Exploration Committee also understands that the process of developing philanthropic resources is deliberate and requires time. Recognizing these facts, the GLBT Exploration Committee encourages The Community Foundation to undertake a continuum of activities, some of which can be initiated immediately at relatively little cost, and others that will require more time, more planning and more financial resources.

### **Early Stage Activities:**

The Community Foundation is encouraged to examine, and if appropriate amend, its own policies, practices and procedures, including anti-discrimination policies, values statements and the like, to ensure that they are fully inclusive and reflect respect for LGBT people, families and the communities of which they are a part.

The Community Foundation is encouraged to require the grantees over whom it has discretion to demonstrate that their organizations have in place policies, practices and procedures, including anti-discrimination policies, values statements and the like, that ensure they are fully inclusive and reflect respect for LGBT people, families and the communities of which they are a part.

The Community Foundation is encouraged to work to ensure that LGBT-supporting organizations and community leaders are invited to participate in all existing Foundation grantmaking initiatives, convenings and other activities.

#### **Mid-Stage Activities:**

The Community Foundation is encouraged to begin the deliberate process of identifying and cultivating donors with the potential to support an LGBT Field of Interest Fund. The Foundation is encouraged to assemble a group of donors, practitioners and community leaders to articulate the mission and focus of the fund. The Fund, once established, should be advised by a similar group of donors, practitioners and community leaders.

The Community Foundation is encouraged to work with existing programs over which it has discretion to raise their awareness of and attention to LGBT issues.

The Community Foundation is encouraged to collaborate with the Nonprofit Center of Northeast Florida and available corporate diversity resources to enhance nonprofit leaders' knowledge, skills and capacity to provide a workplace that is supportive of and welcoming to LGBT employees and volunteers. The Community Foundation is encouraged to consider providing small dollar grants to support appropriate education and training and to incentivize organizations to implement necessary changes.

The Community Foundation is encouraged to convene, or support the convening of, groups of nonprofit and for-profit service providers working in common service areas to build understanding of strategies for effectively meeting the needs of LGBT clientele. For example:

- Convene youth-serving organizations around meeting the needs of LGBT youth;
- Convene health and mental health organizations around meeting the needs of LGBT people and families;
- Convene members of the faith community to encourage understanding and respect for LGBT people and families.

The Community Foundation is encouraged to convene groups of nonprofits and community organizations that primarily serve LGBT constituents to help them learn from one another and foster collaboration. The Community Foundation is encouraged to consider the merits of providing small dollar grants to provide appropriate education and training and incentivize organizations to implement necessary changes.

#### **Mature-Stage Activities:**

The Community Foundation, using the resources of its GLBT Field of Interest Fund, is encouraged to consider supporting:

- Capacity building to expand the capacity of organizations to better serve the LGBT community.
- Leadership development for emerging and existing leaders within the LGBT community.

- Communication activities (i.e. marketing campaigns, communication vehicles, use of social media, speakers bureaus) to build community knowledge and understanding about the LGBT community.
- Activities that will lead to establishment of a council, independent of The Community Foundation, that could advocate for implementation of the full array of human rights to all members of the LGBT community.
- Development of a physical center for the area's LGBT community.

The LGBT Exploration Committee encourages The Community Foundation to leverage its relationships and influence in such a way as to build knowledge and understanding across the community. The Committee members believe that these efforts will accrue benefits not only to the LGBT community, but to The Community Foundation, which will establish new relationships, new networks, new resources and new opportunities to practice philanthropy across greater Jacksonville.

**GLBT Exploration Committee Members:**

David Andress, HIV/AIDS program coordinator, Duval County Health Department  
 Mary K. Brennan, staff attorney, Jacksonville Area Legal Aid  
 Nancy Broner, consultant  
 Edi Castro, Wells Fargo  
 Jim Crooks, community volunteer  
 Nancy Dreicer, child advocate  
 Josephine Jackson, Office of Equity and Inclusion, Duval County Public Schools  
 Bruce Joffe, Pastor, Christ Church of Peace  
 Laura Lane, Chief Operating Officer, Jacksonville Community Council Inc.  
 Mark Lemmenes, Pastor, Peace Presbyterian Church  
 Linda Levin, Executive Director, Elder Source  
 Dan Merkan, Director of Evaluation and Technology, JASMYN  
 Blake Osner, JEA / First Coast Diversity Council, Northeast Florida LGBT Corporate Roundtable  
 Greg Pingree, Florida Coastal School of Law  
 Frieda Saraga, PFLAG of Jacksonville  
 Diane Schatz, PFLAG / OUT Jacksonville  
 Thomas Serwatka, Vice President / Chief of Staff, University of North Florida  
 Tina Vaughn, director of the Rape Recovery Team, Women's Center of Jacksonville  
 Cindy Watson, Executive Director, JASMYN  
 Nan Worsowicz, District Guidance, Duval County Public Schools  
 Richmond Wynn, Department of Public Health, University of North Florida