

Out in the South Program Evaluation

Conducted by See What I Mean Consulting, LLC
September 2024

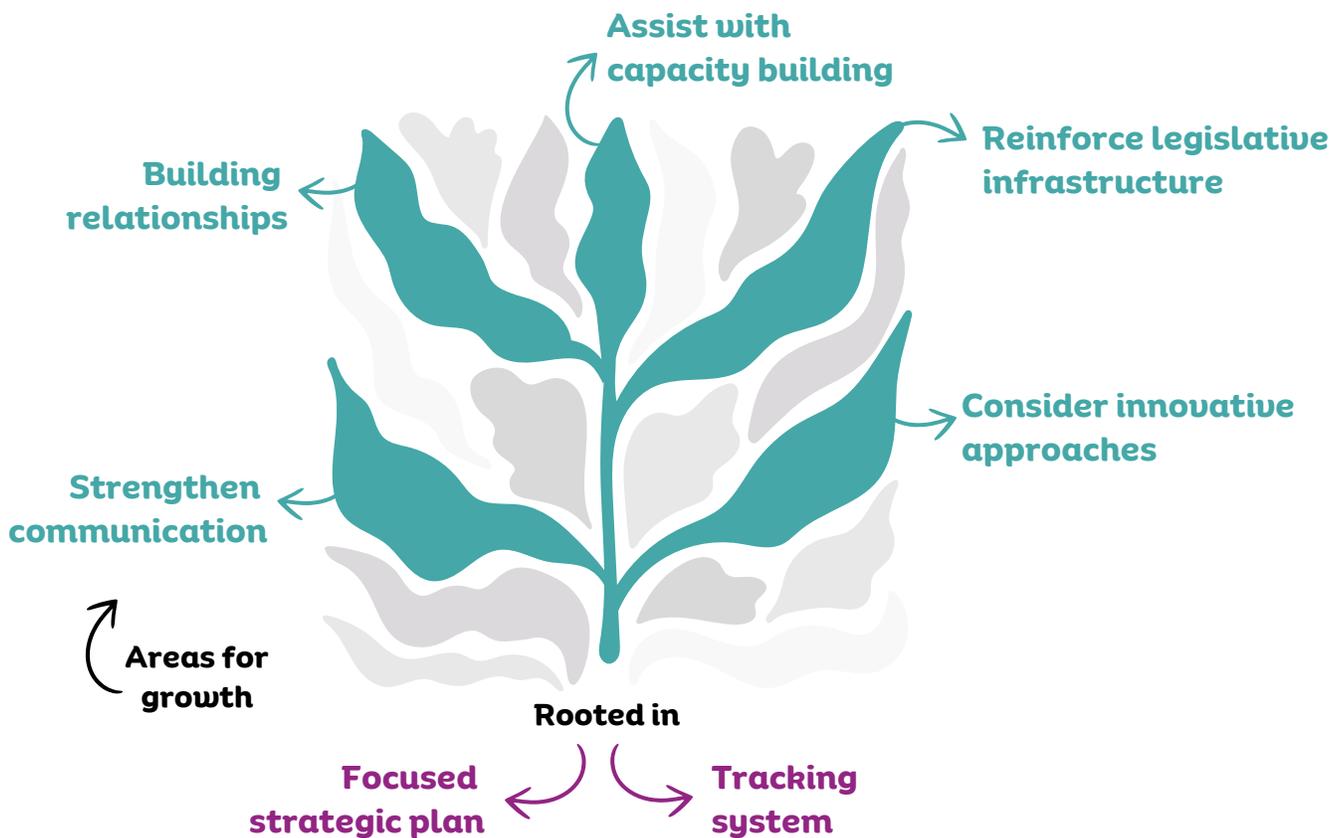


See What I Mean™

EXECUTIVE SUMMARY

Out in the South has grown and transformed from its inception. Out in the South is now at an opportunity point for redefining the goals, scope, and geographic distribution of its grantmaking.

Out in the South should be rooted in a **focused strategic plan** and a **tracking system** to measure key performance indicators. Areas for growth include **strengthened communication, building relationships, assisting with capacity building, reinforcing legislative infrastructure, and utilizing innovation approaches.**

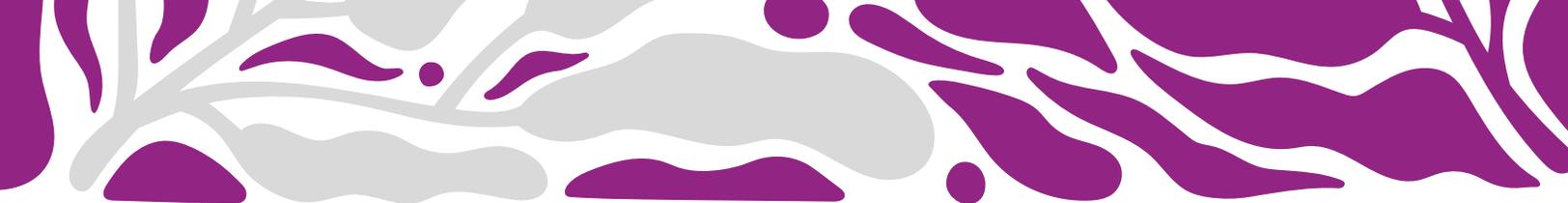


BACKGROUND

In the early 2010s it was estimated that almost 3 million people—or about 32% of the LGBTQ population in the United States—lived in one of 14 Southern states. Overall, the South received less than 6% of domestic funding for LGBTQ organizations throughout the United States. In the few years prior to the 2015 Obergefell v. Hodges ruling by the Supreme Court that legalized same sex marriage, the Williams Institute found that LGBTQ residents in the South were more likely to be uninsured, face social hostilities, and earn \$11,000 less per year than their heterosexual neighbors. They were also more likely to have marginalized intersectional identities such as being people of color, impoverished, single parents, or immigrants. However, in 2012 Southern LGBTQ organizations received about \$4.8 million compared to \$10 million funding for similar organizations in New York City. Of all funding to LGBTQ organizations in the South, 30% came from community foundations or LGBTQ public foundations and 40% was from private foundations.



Out in the South serves 14 states in the southern United States.



In 2013 at the Gill Foundation’s “Out Giving” convening, a group of funders dedicated to uplifting LGBTQ communities in the South recognized the extreme underfunding of LGBTQ organizations in the South and resolved to build a strategy to address the resource gap. A steering committee formed and reconvened in Charlotte, NC later that year.

A formal study was commissioned to survey the state of LGBTQ populations in the South and to determine the breadth of resources and funding dedicated to improving these communities. The study’s alarming results of the status of LGBTQ communities in the South and the resources dedicated to these communities led to the creation of the Out in the South Initiative in 2014.

The goals of this initiative were threefold:

1. Bring national level LGBTQ funders to the South via a new model for funneling national and regional funding to local funders in the South;
2. Build support networks and grassroots movements for LGBTQ communities in the South;
3. Eliminate resource gaps for the LGBTQ populations in the South that face additional challenges via marginalized racial/ethnic, gender, economic, and social identities.



PROGRAM EVALUATION

In the spring of 2024 Funders for LGBTQ Issues and the Out in the South Fund commissioned See What I Mean (SWIM) consulting to conduct an evaluation of the Fund's first decade. The evaluation entailed 8 interviews and 17 surveys with current and former staff, steering committee members, funders, and grantees.



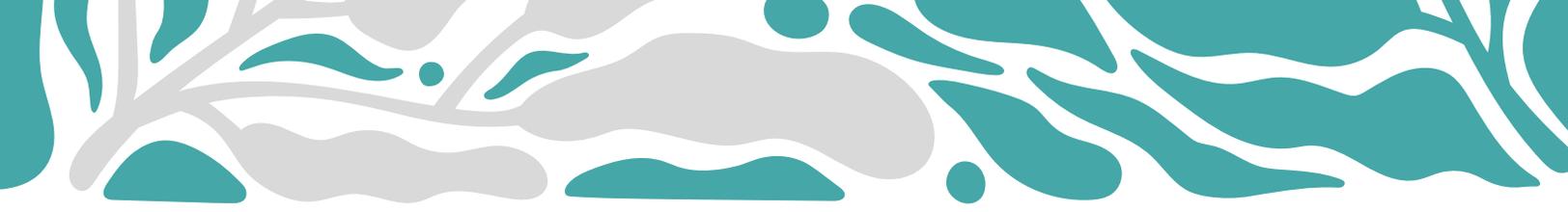
8 interviews



17 surveys

The scope of the project was to conduct a program evaluation to:

- **Assess the impact, successes, and challenges** of the Out in the South Fund during its 10-year history.
- **Identify areas for improvement, change, and realignment** in grant recipients and the LGBTQ issues supported by the Out in South Fund.
- **Understand the goals and observations** of the funders, steering committee and grantees of the Out in the South Fund from 2019 - 2021 and the present.



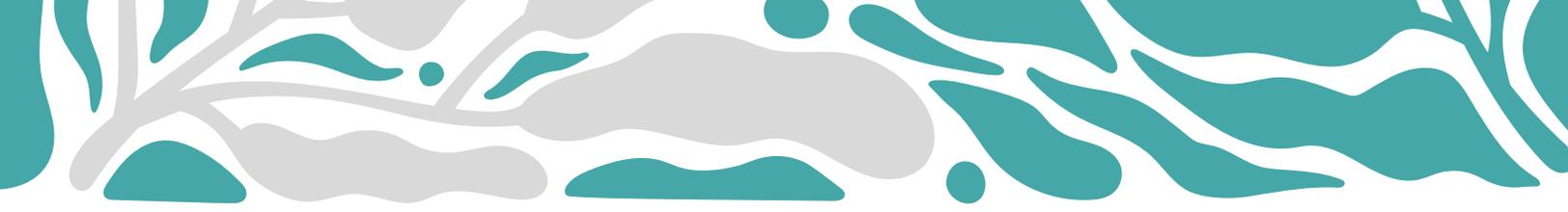
THE OUT IN THE SOUTH FUND: 2013-2019

According to funders and stakeholders who were present at the founding of the Out in the South Fund, the program originated with two goals:

- To build the capacity and infrastructure of LGBTQ organizations in the South, and
- To elevate Southern values and leadership at the national level.

The goal of building organizations in the South focused on reaching beyond the "traditional" funders to identify and support organizations working in and/or with particularly underserved LGBTQ communities such as those in rural areas, those who are racially/ethnically non-White, and those outside of the gender binary. Concurrently, the goal of building Southern LGBTQ leadership at the national level required curating and elevating relationships with donors and nonprofits with nationwide influence. Out in the South aimed to accomplish this second goal by strategically moving and distributing financial resources and supporting regional intermediaries in gaining access to nationwide funders and leaders for LGBTQ communities.

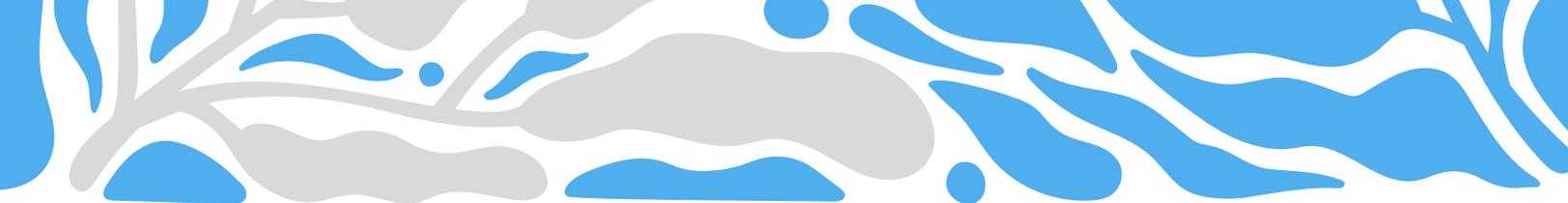




THE OUT IN THE SOUTH FUND: 2020-2024

The initiative has provided capacity building support to grantees, though the extent and impact of this support is unclear. Ensuring strong outcomes for Black, Brown, and transgender/gender non-conforming communities remains a priority.





ACCOMPLISHMENTS

Survey respondents noted many accomplishments that they/their organization experienced as a results of engagement with OTS. Accomplishments listed centered on the below themes:

Capacity Building

- Increased size and capacity of OTS Fund grantees.
- Expanded grantmaking reach across the region.

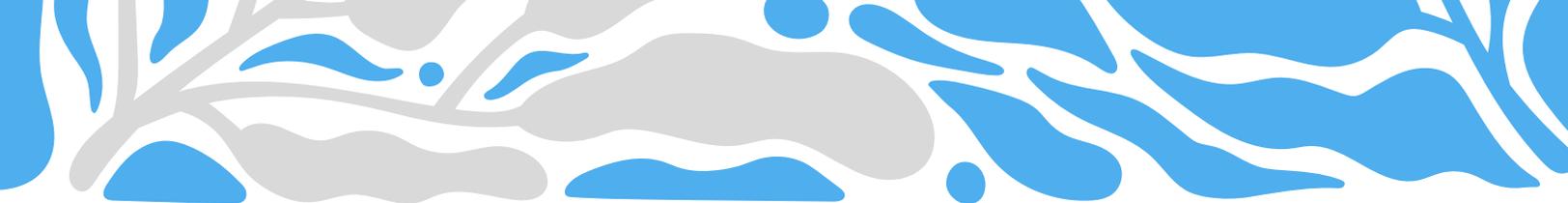
Visibility

- Higher profile of OTS Fund grantees with national funders.
- Enhanced visibility and awareness of queer organizing and needs in the South.

Diversity and Inclusivity

- Broader diversity of organizations applying for grants, including both major players and smaller grassroots groups.
- Increased funding requests for JEDI (Justice, Equity, Diversity, and Inclusion) training and cultural awareness services.





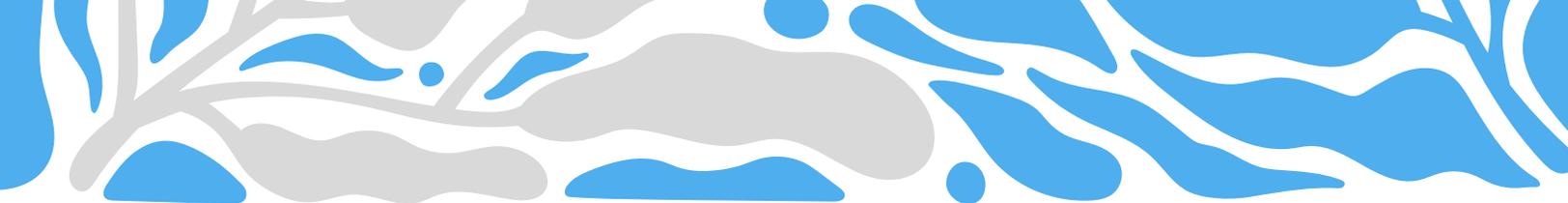
“
OTS funds allowed us to maintain a steady funding stream during the most critical time in our organization's very early development when sustainability was a major concern.
”

“
Our partnership with OITS has been nothing short of transformative, playing a vital role in our success.
”

Survey respondents also cited many examples of work that OTS does well today such as:

- Providing materials, talking points and studies.
- Organizing larger national donors so that money moves to the South.
- Serving organizations that are often neglected.
- Funder advocacy.
- Building relationships and connections with and between LGBTQ organizations and movement leaders.
- Sharing best practices.
- Helping with staff development.





OVERALL IMPACT

When asked about overall impact, responses centered on the themes below:

Resource and Technical Assistance

- Support for the design, planning, and implementation of initiatives.
- Provision of technical assistance on best practices, grantmaking policies, and procedures.

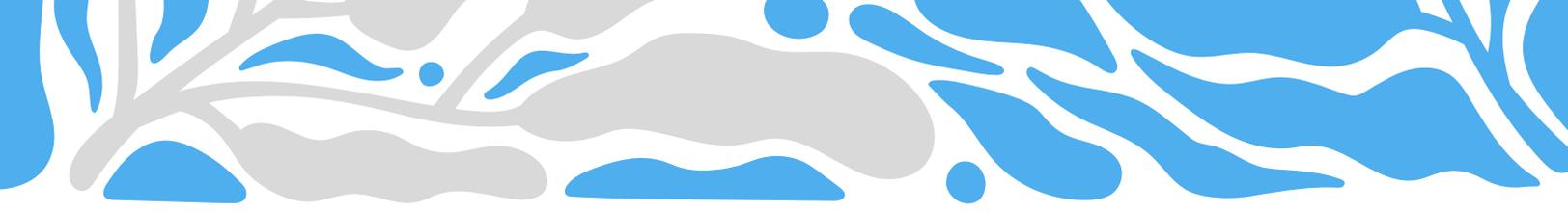
Networking and Community Building

- Facilitation of connections with other LGBTQ funding organizations and participation in various professional development opportunities.
- Networking convenings and opportunities to share information and learnings.

“

I do not believe our organization would be in existence if not for the funds and leadership offered by OTS.

”



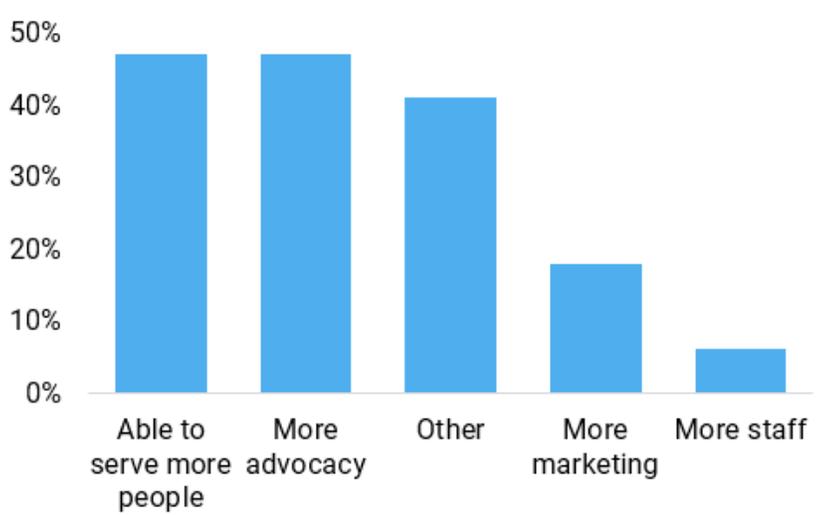
The top three impacts were:

1. Investing in locally-driven Sothern funds.
2. Bringing more funders to the table.
3. Providing services to support funders seeking to deepen their capacity.

IMPACT TO ORGANIZATIONS

The work of OTS is helping organizations expand their reach and do more advocacy.

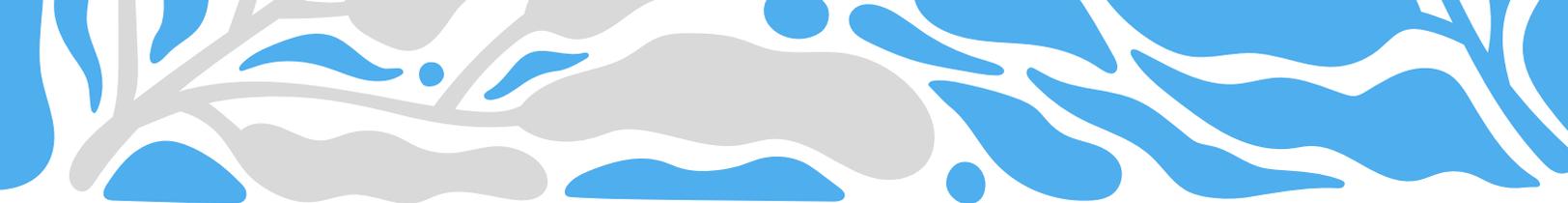
Question: How has Out in the South impacted you/your organization's work over the past few years? Select all that apply.



Top responses were **“ability to serve more people”** and **“more advocacy”**.

Responses in the “other” category centered on support with best practices.





IMPACT TO LGBTQIA+ COMMUNITIES

The work of OTS is helping LGBTQIA+ communities gain visibility. When asked about the top three impacts of OTS's work for LGBTQIA+ communities, answers centered on visibility, providing support for organizations, and network building.

Visibility

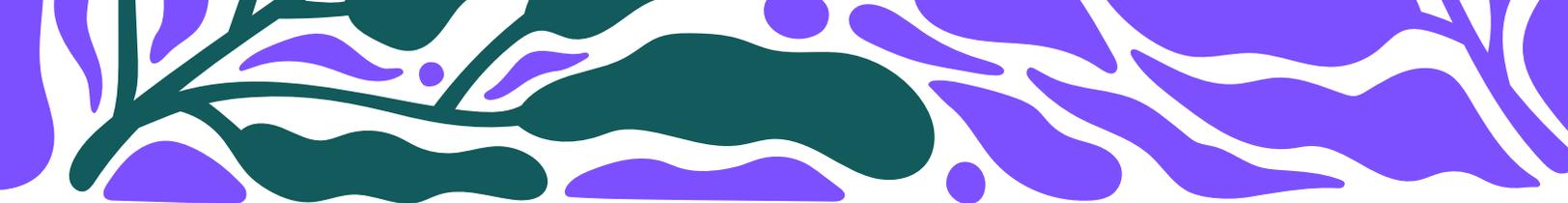
- Increasing the visibility and recognition of LGBTQIA+ individuals and the issues they face.
- Bringing national attention to the underserved Southeast U.S.

Support for organizations

- Supporting emerging and established organizations/programs serving LGBTQIA+ communities.
- Funding grassroots organizations and helping them thrive over time.

Network building

- Creating and maintaining a network of funders that learn and share together.
- Creating connective tissue between organizations and people doing the work in the South.



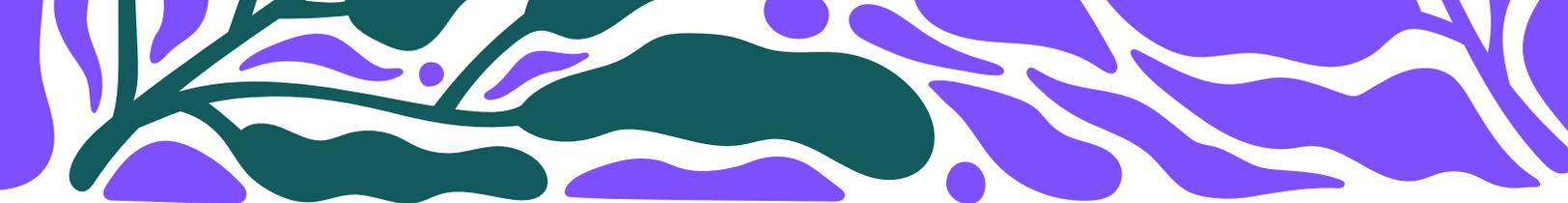
IMPACT AND INFLUENCE OF OUT IN THE SOUTH

OUT IN THE SOUTH FUND

According to stakeholders who were present at its founding, one outcome of the Out in the South Initiative was the **establishment of a collaborative Out in the South Fund—“the Fund”** throughout this report—to stimulate the flow of national resources for LGBTQ communities into the South. Stakeholders who were associated with the Fund throughout its first decade recalled how another goal of Out in the South was to **build capacity and recognition for LGBTQ communities in the South**. It was expected that the Out in the South Fund would facilitate this process by building the capacity and infrastructure of LGBTQ organizations in the South while simultaneously elevating Southern LGBTQ leaders to the networks of national level funders and advocates of LGBTQ Americans. These LGBTQ leaders from the South would then use their expanded access at the national level to, in turn, advocate for additional funding to community foundations and intermediaries who could provide targeted resources to LGBTQ communities throughout the South. This expanded flow of funds and resources from the national level to regional funders in the South would then attract additional funding to support LGBTQ communities at local levels in the South.



In other words, the goal of the Out in the South Fund was to:

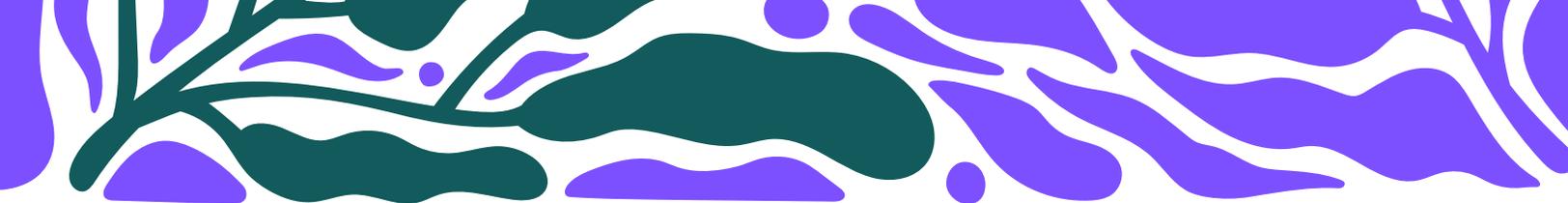
- 
1. Create a pooled fund at the regional level to support LGBTQ funders in the South,
 2. Build a network of funders dedicated to funding LGBTQ organizations in the South,
 3. Offer capacity building and technical assistance to LGBTQ organizations in the South.

EXPANDED FUNDING ACCESS AND PATHWAYS FOR LGBTQ COMMUNITIES THROUGHOUT THE SOUTH



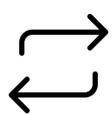
The Out in the South Fund was created as a **pooled fund** to increase LGBTQ resources in the South by pooling national and local funding.

The selection committee for the pooled fund was composed of Out in the South stakeholders who reviewed proposals and allocated grants to regional funders in the South. Selection criteria included organizational capacity, fundraising ability, and commitment to diverse LGBTQ communities of the Fund's potential grantees. Additionally, the committee was dedicated to providing balanced funding throughout the region with a particular focus on underserved areas within the South.



The pooled fund offered matching grants plus technical assistance and capacity building to regional and community funders in the South who provided targeted grants to address specific gaps and needs for local LGBTQ populations.

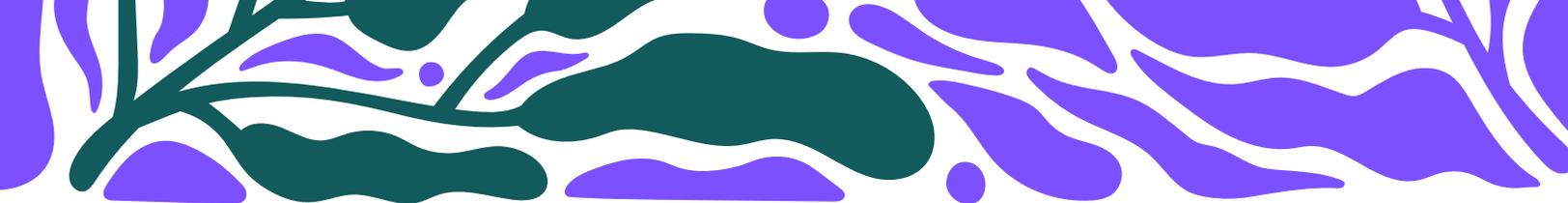
According to current and former steering committee members, in its first 10 years the Out in the South Fund created a strong center of gravity for regional grantmaking. Over time the grantees of the pooled fund shifted as the grantmaking process became more competitive.



This resulted in a shift from supporting mainstream Southern funders to collaborating with existing progressive funding networks in the South. The expanded strategy helped deliver more widespread and targeted support to LGBTQ communities throughout the South by leveraging local knowledge, networks, and relationships.

At the same time, intermediaries in the South played a key role in helping Out in the South build and sustain capacity for LGBTQ communities and organizations in the region. One of the Fund's support pathways was to assist intermediaries and local funders in moving resources to grassroots groups throughout the South. Another pathway was via the Fund's grants, which grantees were able to use as leverage for attracting additional funding sources and launching new LGBTQ funds at the local level.





Additionally, the expanded funding and capacity of LGBTQ organizations in the South, as a result of the Fund, created “legitimacy” for these organizations at the national level. The new national interest in LGBTQ organizations in the South attracted more donors and shifted national funders' priorities for the South. This proved especially critical in the South over the past few years due to the increased anti-LGBTQ legislation post-Obergefell.

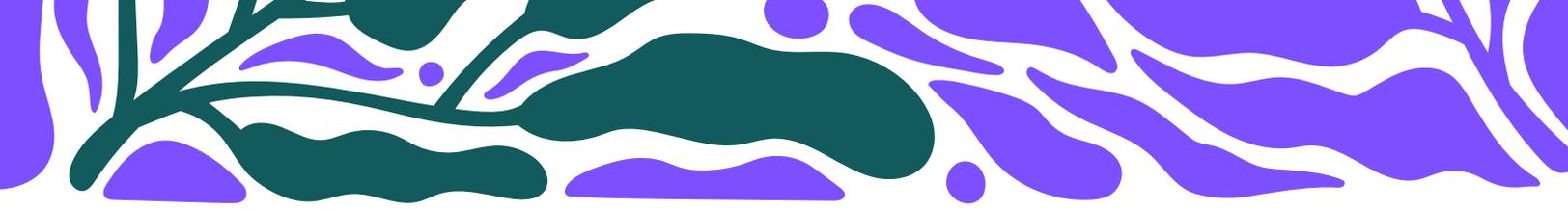
INCREASED RESOURCES FOR GRASSROOTS AND MARGINALIZED LGBTQ GROUPS IN THE SOUTH



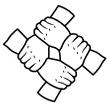
Another focus of Out in the South was to **increase recognition and support for smaller, grassroots LGBTQ organizations in the South.**

One strategy for achieving this goal was to build localized funding networks throughout the region while also facilitating collaborations among funders of LGBTQ organizations. This was especially important since most of the original Out in the South funders were concentrated in North Carolina and Virginia because that was where most LGBTQ funders in the South were located. The initial stakeholders of the pooled fund wanted to expand the geographic reach and distribution of funding sources across the South, especially in larger states such as Florida and Georgia. As a result, the expanded funding network would then facilitate the growth and support of smaller LGBTQ organizations across.





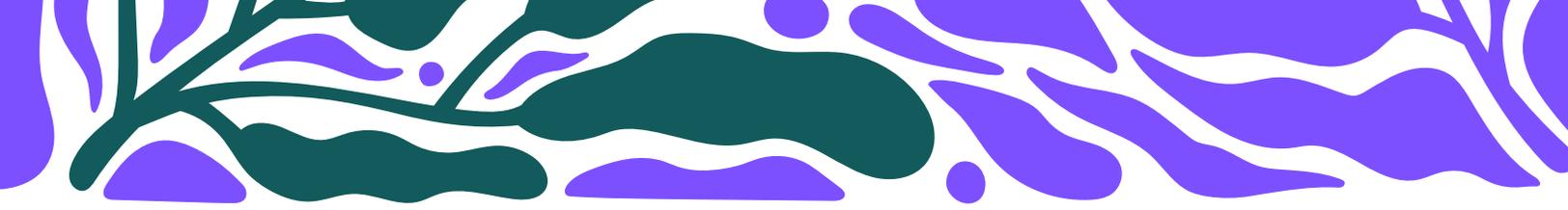
According to the stakeholders interviewed for this evaluation, Out in the South was particularly valuable in building capacity and sustainability of LGBTQ organizations in the South. The Fund provided several grants for operating support and optional matching grants that were beneficial to small grassroots LGBTQ groups across the South. Out in the South also offered several capacity building opportunities such as assisting grantees with conference attendance, professional development, technical assistance, and networking. These opportunities also facilitated smaller LGBTQ organizations in the South with identifying funding gaps and building relationships and trust with other potential funders. By moving away from traditional funding models, smaller and grassroots organizations LGBTQ organizations in the South were able to expand their impact, diversify their funding sources, and address resource gaps by leveraging their expanded networks.



Another goal of Out in the South was to **center racial and gender equity** in their work.

Over time, equity and intersectionality became a greater focus of Out in the South. The shift to centering an intersectional approach created some discomfort among donors and stakeholders but, ultimately, there was agreement that this approach was necessary in the current social-political contexts of identifying as both LGBTQ and a racial or ethnic minority.





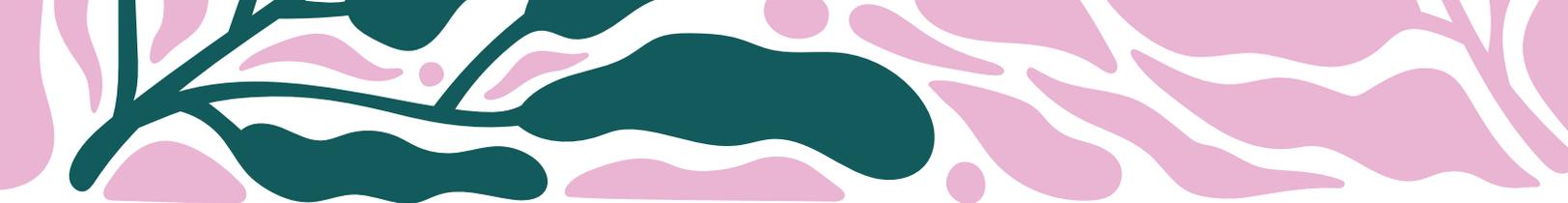
However, one of the stakeholders interviewed noted that it was important for funders to recognize that support and resources lacked the most for marginalized groups within the LGBTQ communities. The rise of anti-LGBTQ and anti-trans legislation in the US, but especially the South, also shifted the focus of Out in the South. This is especially important when considering the increased challenges for Black and Brown transgender and non-binary people, including minors, who are at significant risk of violence, poverty, displacement, and other attacks.





VISION FOR THE FUTURE

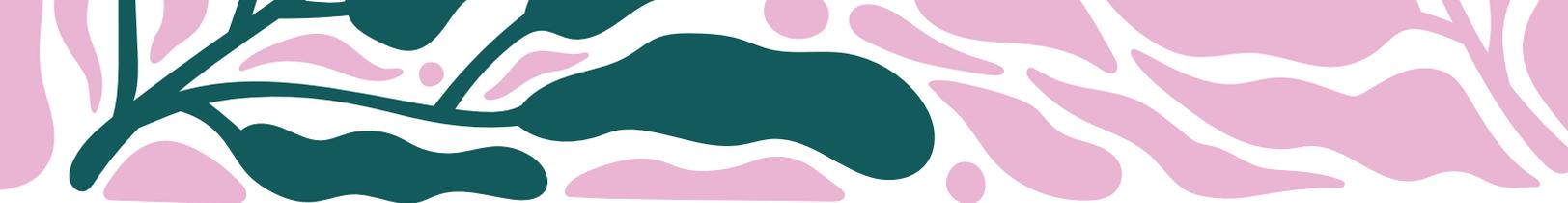
LGBTQ individuals living "fully and freely and healthy and supportive" without fear or discrimination.



NEXT STEPS

The primary goal for Out in the South over the next few years is to **build a systematic framework for Out in the South's operational and organizational structures**. This framework has many elements, which includes streamlining the grantmaking process, inclusion of stakeholders, and focus areas of Out in the South. By establishing and outlining their policies and expectations, Out in the South will increase their impact at all levels. Essential elements of the new framework will include:

- **Defining specific subject-area and geographic strategies for grantmaking.** The needs and priorities for LGBTQ communities throughout the South are diverse and often vary according to current events and local politics. Establishing priority topics and regions will assist with more targeted--and ostensibly effective--grantmaking, capacity building, and grassroots partnerships.
- **Launching a Grants Management System (GMS).** A GMS will reinforce the new operational framework by providing a digital repository for the grantmaking arm of Out in the South.

- 
- **Implementing a schedule of more frequent site visits with grantees.** By increasing the amount and frequency of check-ins with grantees, Out in the South can provide more capacity building and technical assistance while also providing more oversight of grantee operations and outcomes.
 - **Conducting more frequent and regular communications.** A common challenge for stakeholders--both internal and external--has been inconsistent communication and meetings. The establishment of a regular communication cadence with increased frequency will benefit all stakeholders.
 - **Building a stronger rural base.** LGBTQ people in rural areas are often “invisible” due to their smaller numbers and fewer LGBTQ-specific resources. Out in the South will further develop outreach and funding opportunities for these communities.
 - **Increasing the number of national funders who support Out in the South.** One of the original missions of Out in the South was to increase the number of national funders who support LGBTQ communities and issues in the South. Out in the South will renew and re-emphasize these efforts in the coming years.