GIVING AMONG SAME-SEX COUPLES: THE ROLE OF IDENTITY, MOTIVATIONS, AND CHARITABLE DECISION-MAKING IN PHILANTHROPIC ENGAGEMENT

Elizabeth Jane Dale

Submitted to the faculty of the University Graduate School
in partial fulfillment of the requirements
for the degree
Doctor of Philosophy
in the Lilly Family School of Philanthropy
Indiana University

June 2016

Accepted by the Graduate Faculty, Indiana University, in partial fulfillment of the requirements for the degree Doctor of Philosophy.

Debra J. Mesch., Ph.D., Chair

Lehn M. Benjamin, Ph.D.

Doctoral Committee

Dwight F. Burlingame, Ph.D.

May 6, 2016

Nancy Marie Robertson, Ph.D.

DEDICATION

To my parents, for instilling in me a love of learning.

ACKNOWLEDGEMENTS

I have often heard that completing a Ph.D. can be a lonely path. For me, I found the road through my program to be rich with people who were insightful, caring, and collaborative, giving me the opportunity to form friendships and meet new colleagues from the United States and around the world.

First and foremost, I thank my chair, Dr. Debra Mesch, the Eileen Lamb O'Gara Chair in Women's Philanthropy and director of the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy. This dissertation was born out of a presentation on women's giving Deb gave back in 2011 when I was the Director of Development for Advocate Illinois Masonic Medical Center in Chicago. During the question and answer period of her presentation, an audience member asked, "What about same-sex couples?" Deb's answer was that academic research simply didn't know. Over the next three years, as I was accepted into a Ph.D. program, completed my coursework, taught undergraduate students, and collaborated with Deb and her colleagues on new research, I realized that important question still had not been answered. Thus, I decided to take it on. Deb, at every point through this process, you have been nothing but a positive, supportive role model, reading drafts, introducing me to your colleagues, and helping me hone my research and writing skills. I look forward to our continued collaboration as we research women's giving in the coming years.

To my research committee, Dr. Dwight Burlingame, Dr. Nancy Robertson, and Dr. Lehn Benjamin, I knew I had expertise in my corner. Dwight, thank you for offering your personal library to me many times and being incredibly patient when I asked to move books across the country because I hadn't finished reading them. Nancy, from my first year in the Ph.D. program, you posed the most interesting and important questions about my scholarship and professional goals and guided me with thoughtful questions about queer identity, women's giving, and how to bring my women's studies background into the study of philanthropy. And finally, Lehn, you offered methodological expertise and provided encouraging notes, helpful articles, and book suggestions to this dissertation research, not to mention facilitating the monthly Ph.D. seminars that helped all of us in the Ph.D. program pass our exams, write better, and get published.

I have had the pleasure to make so many friends from Indiana University who shared some or all of this journey with me: Sarah, Kori, Ruth, Richard, Jim, Pat, Barb, Peter, and Kim, I know you have much to offer this world! Dr. Gen Shaker deserves special thanks as both a mentor and collaborator in teaching and research. To my friends from ISTR, who stayed in touch via Facebook over the past two years as we celebrated graduations and new jobs, welcomed new children into the world, and faced our own personal obstacles: Emily, Carlos, Johanna, Mieke, and especially Christiane.

To my friends in Indianapolis, who allowed me to build a rich life outside of academia, including the lovely Ladies of Leisure book club, our neighbors in Chatham Arch who welcomed us immediately, and the members of the Chatham Arch Community Garden, which kept us full of tomatoes in the hot Indiana summers!

To my new colleagues at Seattle University, Maureen, Noreen, Angela, Peter, Lindsay, and Sarah, I feel so fortunate to work with you each day to build the next generation of nonprofit leaders and grapple with the issues of power and privilege that inhabit the nonprofit sector as they do all other aspects of life. Thank you for allowing me to make my intellectual home in a place so supportive of my teaching and research. To Liz Flores-Marcus and ChrisTiana ObeySumner, thank you for volunteering to serve

as peer reviewers on this work amid pursuing your own degrees. You both contributed valuable insights and perspective.

To my parents, who have always encouraged me to keep learning and who supported me at every step. Mom, I still write everything for you.

And finally, to Sarah, my wife, who said yes when I asked her if I could quit my job to pursue full-time graduate study and uproot us from our home in Chicago to a new home in Indianapolis, and then eventually across the country for a new job in Seattle. I hope we can always support each other in achieving our goals and continue to enjoy the new adventures life will bring.

Elizabeth Jane Dale

GIVING AMONG SAME-SEX COUPLES:

THE ROLE OF IDENTITY, MOTIVATIONS, AND CHARITABLE DECISION-MAKING IN PHILANTHROPIC ENGAGEMENT

This study investigates the philanthropic practices of same-sex couples, including their motivations for giving and how they make philanthropic decisions. Existing research has focused almost exclusively on heterosexual couples and assumes that all households are the same. Using the frameworks of the eight mechanisms of giving and social identification theory, this study investigates the role of identity in philanthropic behavior and how gender differences may be amplified among same-sex couples. Drawing on 19 semi-structured joint interviews with gay and lesbian couples in Indiana, the research uses a qualitative method to “give voice” to a marginalized population’s philanthropic experiences that are little studied. The study finds participants are highly engaged in nonprofit organizations and participate in a diverse array of philanthropic behaviors. While many couples support at least one LGBT-affiliated nonprofit, giving to LGBT causes does not constitute the majority of most couples’ philanthropy. Still, sexual orientation plays a significant role in motivating support for the LGBT community, for public policy changes and equal rights initiatives, and to HIV/AIDS-service organizations. Sexual orientation also determines which organizations many donors would not support. Same-sex couples also use their philanthropy as a way to support their communities at-large and be recognized by mainstream society. In terms of financial management, a majority of participant couples maintained independent financial

accounts or partial pooling systems of household income, leading to more opportunities for charitable giving; at the same time, couples expressed low conflict over making giving decisions and supported one another's interests. This study provides scholars and practitioners insights into the complex interactions of motivations, identity, and financial arrangements that underscore charitable giving, and it offers implications for nonprofit organizations and fundraisers who work with diverse populations of donors.

Debra J. Mesch, Ph.D., Chair

TABLE OF CONTENTS

CHAPTER ONE – INTRODUCTION....................1
LGBT Individuals in the United States....................3
Problem Statement....................5
Study Purpose....................7
Study Significance....................7
Research Questions....................8
Study Design....................9
Definition of Key Concepts....................9
Dissertation Overview....................12

CHAPTER TWO – REVIEW OF LITERATURE....................14
Motivations for Giving....................14
Household Financial Management....................21
Household Charitable Decision-Making....................25
Gender Differences in Charitable Behavior....................27
Research on LGBT Philanthropy....................28
Current Research Limitations....................29

CHAPTER THREE – METHODS AND RESEARCH DESIGN....................31
Overview of the Qualitative Approach....................31
The Role of the Researcher....................34
Data Collection: The Semi-Structured Joint Interview....................35
Sample and Study Participants....................39
Data Analysis....................44
Ethical and Trustworthiness Considerations....................46
Limitations....................48
Remaining Chapters....................49

CHAPTER FOUR – PHILANTHROPIC GIVING AND VOLUNTEERING....................50
Same-Sex Couples' Philanthropic Participation....................52
    Giving to LGBT Organizations....................56
    The Value of Donor Gifts....................57
Giving Away Goods....................58
Giving Directly to Individuals....................60
Giving of One's Time....................64
Planned and Future Giving....................68
Increasing One's Contributions through Employer Matching Gifts....................70
Supporting One's Own Nonprofit Employer....................71
Conclusion....................73

CHAPTER FIVE – HOUSEHOLD FINANCIAL ARRANGEMENTS AND CHARITABLE DECISION-MAKING....................75
Household Financial Management....................76
    Even with Independent Management, Money is Shared....................79
Making Charitable Giving Decisions....................82

Agreement about Giving....87
Separate Giving, Shared Recognition....92
Interview-Based Gift Decisions....94
Conclusion....95

CHAPTER SIX – THE ROLE OF IDENTITY AND MOTIVATIONS FOR GIVING....96
Identity and Philanthropy: The Role of Sexual Orientation....97
    Theme 1: Giving to Build and Uplift LGBT Communities....98
    Theme 2: Giving to Shape Public Policy and Law....103
    Theme 3: Using Philanthropy to Assert LGBT Identity in the Mainstream....105
    Theme 4: The Experience of HIV/AIDS: Giving for Loss and Giving Back....108
    Theme 5: Seeking Acceptance and Avoiding Discriminatory Organizations....110
Identity and Philanthropy: Aspects of the Self....115
Motivations for Giving....118
Conclusion....128

CHAPTER SEVEN – SUMMARY, DISCUSSION, AND IMPLICATIONS....130
Summary of Study....130
Discussion....131
    Same-Sex Couples' Giving and LGBT Philanthropy....131
    Motivations for Giving....134
    Role of Identity in Philanthropy....138
    Household Financial Management and Charitable Decision-Making....142
    Differences between Male and Female Same-Sex Couples....148
Theoretical Implications....150
Implications for Future Research....155
Recommendations for Practice....157
Closing Comments....160

APPENDIX A – INTERVIEW GUIDE....162

APPENDIX B – STUDY INFORMATION SHEET....169

APPENDIX C – RECRUITMENT EMAILS....171

APPENDIX D – PARTICIPANT PROFILES....173

REFERENCES....175

CURRICULUM VITAE

LIST OF TABLES

TABLE 1 – Demographics of Individual Study Participants 43

TABLE 2 – Household Demographics 44

TABLE 3 – Financial Management Practices among Study Participants 78

TABLE 4 – Aspects of the Self that Influenced Philanthropy...116

TABLE 5 – Motivations for Giving...119

LIST OF FIGURES

FIGURE 1 – Percentage of Couples Supporting Each Charitable Subsector....................54

FIGURE 2 – Distribution of Giving by Charitable Subsector (Number of Gifts).............56

FIGURE 3 – Same-Sex Couples’ Process for Charitable Decision-Making...................154

CHAPTER ONE
INTRODUCTION

Each year, as many as 89% of American households make charitable donations (Independent Sector, 2001), and understanding how and why such giving takes place has been the subject of much philanthropic research (Andreoni, Brown, & Rischall, 2003; Bekkers & Wiepking, 2011; Brown, Mesch, Moore, Kou, & Kim, 2010; Burgoyne, Young, & Walker, 2005; Wiepking & Bekkers, 2010). Deciding to give is a complex process involving individual motivations, such as personal experiences and an awareness of need, and is also situated within the context of larger household economic arrangements and decisions. Individuals, both as singles and couples, are responsible for the vast majority of charitable contributions made each year. In 2014, giving by individuals through current gifts and bequests in the United States comprised 80% of the estimated $358.38 billion given by all sources (Giving USA, 2015). Among households that give, the average annual household contribution is $2,213, while the median is $870 (Center on Philanthropy, 2007). What these studies often overlook is that not all individuals and households are the same.

To date, very little research has examined the philanthropy of lesbian, gay, bisexual, and transgender (LGBT)[1] individuals (see Garvey & Drezner, 2013a, 2013b; Horizons Foundation, 2008, for exceptions). This population is worth studying because identity-based philanthropy scholars have found that marginalized and minority communities approach and participate in philanthropy in different ways than the white,

---

[1] While I predominantly use the more common term LGBT in this dissertation to represent lesbian, gay, bisexual, and transgender individuals, LGBTQ (where the “Q” represents queer) is also used in the literature. When particular individuals’ sexual orientation identities are known, I use specific terms such as gay, lesbian, or bisexual.

heterosexual male that much of the broader literature on philanthropy tacitly assumes as the "norm" (Drezner, 2013). These scholars have largely focused on salient racial, ethnic, and religious identities, examining philanthropy in African American, Hispanic, Jewish, Muslim, and immigrant communities (Cabrales, 2013; Gasman & Bowman, 2013; Tobin, Solomon, & Karp, 2003; Wagner, 2011). It is important to understand how people with minority identities, including LGBT individuals, may express different motivations to give that reflect their personal and societal experiences. Garvey and Drezner's (2013b) study of LGBT alumni's giving to higher education is a first step in understanding the charitable contributions LGBT individuals make and their expressed desire to engage in community uplift for other LGBT individuals. However, their study does not address the questions of household decision-making that all couples, regardless of sexual orientation, face, nor does it look beyond giving to higher education.

Through interviews with same-sex couples in Indiana, this study explores how lesbian and gay couples engage in philanthropy and make charitable decisions. Empirical research on LGBT individuals' philanthropy is just beginning, and no current work investigates philanthropic experiences from the perspective of same-sex couples. In order to understand how and why same-sex households engage in philanthropic behaviors, this study uses a qualitative methodology to understand the philanthropic practices among same-sex couples, which allows gay, lesbian, and bisexual individuals to recount their experiences in their own words and avoids assuming that dominant theoretical frameworks apply. As qualitative research is focused on an understanding of the particular rather than broad generalizability, this study is also limited to same-sex couples in one specific state in order to hold the geographical context constant, providing a consistent political and legal setting and a similar range of potential organizations from which individuals may choose to donate or volunteer.

LGBT Individuals in the United States

LGBT individuals are vital members of communities across the country, yet they continue to face inequitable laws and social stigma, despite now having access to legal marriage throughout the United States. The Williams Institute estimates that approximately 9 million adults in the United States identify as lesbian, gay, bisexual, or transgender, representing an estimated 3.8% of all Americans (Gates, 2011). According to the U.S. Census Bureau, as of 2010, there were 131,729 same-sex married couple households and 514,735 same-sex unmarried partner households in the United States, which is likely an undercount given The Williams Institute's study (O'Connell & Feliz, 2011). Women now comprise 51% of self-identified same-sex couples, which is an increase from 2005 when the majority of self-identified same-sex couples were male (Gates, 2013).

From 2013 to 2015, the social, economic, legal, and policy environment for same-sex couples changed quickly, with legal relationship recognition increasing at a rapid rate. In 2013, a portion of the federal Defense of Marriage Act was struck down, which required the federal government to recognize same-sex marriages granted by the states where they were legal, extending federal tax savings to couples in legal unions, which may encourage greater charitable giving. Also in 2013, several additional states extended marriage rights to same-sex couples through legislative action or state court rulings. Throughout 2014, same-sex marriage became legal in 19 additional states, with the majority of legalization decisions made by U.S. district courts instead of by state legislatures or popular vote (Pew Research Center, 2015). Finally, in June 2015, the U.S. Supreme Court ruled that bans on same-sex marriage were unconstitutional, granting legal marriage to same-sex couples across all 50 states.

Even amid such a significant public policy victory for LGBT people, unequal laws, social stigma, and backlash following these legal gains remain. Despite a changing legal environment that increased marriage rights to LGBT people, LGBT individuals continue to face employment discrimination, higher poverty rates, youth homelessness and suicide, violence, health disparities, and an increasing need for senior services (Badgett, 2001; Center for American Progress, 2010; Movement Advancement Project, 2014; Movement Advancement Project & Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders, 2010).

In 2005 (the last year for which data is available), there were an estimated 169,700 LGBT people, including almost 16,000 same-sex couples, living in Indiana (Romero, Rosky, Badgett, & Gates, 2008). Marion County, where Indianapolis is located, reported the most same-sex couples in the state. As a result of a federal appeals court decision, Indiana began granting same-sex marriages and recognizing marriages from other states in 2014. Prior to 2014, same-sex marriage was not legal in the state, though individual employers could choose to offer benefits to same-sex domestic partners. Demographers show that same-sex couples live in every Indiana county, are racially and ethnically diverse, have partners who depend upon one another financially, and actively participate in the state's economy (Romero et al., 2008).

However, key differences between same-sex and different-sex couples also exist. In Indiana, individuals in same-sex couples are more likely to be employed than married different-sex couples (77% to 68%) and are more likely to have a college degree (29% to 21%) (Romero et al., 2008). Conversely, same-sex couples also are less likely to own their homes (63% to 86%), and gay men earn significantly less than their heterosexual married male counterparts (Romero, et al., 2008). Less than one-quarter of same-sex couples in Indiana are raising children under the age of 18, and same-sex parents have 14% fewer financial recourses to support their children than do married different-sex parents (Romero et al., 2008).

Problem Statement

Most Americans participate in charitable giving during their lives. For many individuals, giving becomes a regular practice that they engage in throughout the year. While research has grown to accurately estimate the annual giving behavior of all Americans (Giving USA, 2015), and specific studies provide detailed information on where and what people give (e.g. Philanthropy Panel Study), less research has focused on the questions of why and how people give; such questions are better suited for qualitative methods. As Bekkers and Wiepking's (2011) retrospective review shows, researchers have explored numerous determinants of charitable giving, often focusing on solicitation mechanisms and the costs and benefits of giving rather than the internal motivations of psychological benefits and values. What is also missing from this research is an understanding of how identity, including sexual orientation and gender, may influence philanthropic behaviors.

In the context of households, there are also differences in terms of how same-sex and different-sex couples make decisions, particularly around money management and financial decision-making that have implications for charitable giving. Existing studies on how heterosexual couples make charitable giving decisions tend to focus on which partner has more power within the relationship and what resources each person brings to the household (Brown, 2005; Lundberg & Pollak, 1993; McElroy & Horney, 1981). Overall, studies find that the partner with more education and more earnings is expected to have more influence within the economic decision-making of the household (Brown, 2005). Further, the results of surveys and focus groups demonstrate that heterosexual couples make charitable decisions in much the same way as they do other household spending decisions (Andreoni et al., 2003; Burgoyne et al., 2005). However, factors such as age, length of relationship, income, race, religious attendance, and previous marriage can influence whether couples make these decisions together or separately (Andreoni et al., 2003; Wiepking & Bekkers, 2010). This existing research does not address the financial management practices of same-sex couples, where gender roles may be less defined and a history of societal discrimination has shaped financial patterns.

Other research has examined the role of gender in charitable giving, finding statistically significant differences in the giving patterns and amounts between men and women (Mesch, Rooney, Steinberg, & Denton, 2006). Women of all income levels are more likely to give than men, and most female-led households give more in actual dollars, when controlling for factors such as age, income, and education (Mesch, 2010). Women donors also tend to spread their giving across a larger number of organizations, giving smaller amounts to each (Andreoni et al., 2003). These findings suggest that a gender component is also present within philanthropy, one which may even be amplified among same-sex couples who give, yielding differences between male and female same-sex couples.

While research on philanthropic behavior has grown, research on the particular practices of specific communities of donors is limited. Where research exists, it has often been conducted by practitioners and philanthropic foundations using convenience samples and is not always comparable to broader studies of charitable giving. This is particularly true when we examine giving among LGBT individuals. By using a qualitative methodology and interviewing same-sex couples together, this study centers the experiences of same-sex couples in order to understand their philanthropic participation, examine their motivations for giving, and explore the role of identity in cultivating philanthropic support.

Study Purpose

The purpose of this qualitative interview study was to gain insight into how same-sex couples engage in philanthropy and make charitable decisions. In particular, this study explores the role of sexual orientation identity as a motivation for giving, along with its interaction with other motivations, both those revealed by the participants and detailed by the existing literature. The study also explores the role of household financial decision-making among same-sex couples and its implications for philanthropic participation.

Study Significance

This study will make several contributions to the literature. First, it will increase our understanding of lesbian, gay, and bisexual (LGB) individuals' participation in voluntary, philanthropic action and recognizes LGB individuals as philanthropic actors. No transgender individuals took part in this study, and therefore, this study's findings may not reflect their experiences. Further, it is important to recognize that being transgender is a gender identity and is distinct from sexual orientation. Second, this study will examine how same-sex couples make charitable giving decisions and describe how such findings support and/or deviate from the literature on general giving motivations, the latter of which tends to focus mostly on heterosexual individuals' charitable giving decisions. It will also compare same-sex couples' charitable decision-making to existing research of heterosexual couples' decision-making. Third, it will also consider how LGB identity may influence philanthropic practices. Findings from this study will therefore provide rich information on the experiences of charitable decision-making within same-sex households, which will add to current theory on the topic. Finally, the findings will also provide information for nonprofit organizations and fundraisers who seek cultural competency in working with a diverse donor base and wish to engage with LGB donors.

Research Questions

The purpose of this qualitative interview study is to understand the philanthropic motivations and decision-making practices of same-sex couples and asks: How do members of same-sex households describe the meanings and experiences of their philanthropic participation?

Beyond this overarching question, this study also investigates: What do LGB donors identify as their motivations for giving? How do LGB individuals use philanthropy as an expression of identity and values? How do same-sex couples make philanthropic decisions within the context of the larger household economy? Because same-sex couples are underrepresented in current quantitative surveys of giving and because such surveys are not ideal for examining identity- and experience-driven motivations for giving, this study enhances our understanding of philanthropic participation and the role of identity in deciding whether or not to give.

Study Design

A qualitative design was used for this study and included grounded-theory analysis techniques. Qualitative methods are particularly appropriate in areas where theory is under-developed and allows members of marginalized populations to share their experiences in their own words (Creswell, 2013; Esterberg, 2002). Nineteen same-sex couples, including 10 male couples and nine female couples, were interviewed jointly as couples, using a semi-structured interview protocol designed to uncover the meanings and experiences of their philanthropic engagement (see Appendix A). A full description of the study methods and procedures for data analysis is included in Chapter Three.

Definition of Key Concepts

This study examined the experiences of same-sex couples' engagement in philanthropy. Five concepts are of particular importance: LGBT and LGB individuals, same-sex couple, philanthropy, identity, and charitable decision-making.

LGBT and LGB individuals: Lesbian, gay, bisexual, and transgender (LGBT) individuals are often considered together in popular discourse, and the acronym has been used in prior research on LGBT philanthropy. However, sexual orientation and gender identity are distinct, and each carries with it a separate societal experience. While this study was open to transgender individuals in same-sex relationships, no transgender individuals took part in the study. Therefore, it is important to acknowledge that this study represents participants who identify as lesbian, gay, and bisexual (LGB). Future research should specifically consider the experiences of transgender individuals and their philanthropy.

Same-sex couple: Same-sex couples form the population of this study's participants. As discussed above, same-sex couples can be legally married or unmarried, and both categories are represented in the U.S. Census. Given the patchwork nature of same-sex relationship recognition in the United States until 2015, legal marriage is a poor definition for two people of the same gender in a committed relationship. Moreover, same-sex couples can include individuals who identity as gay, lesbian, bisexual, transgender, queer, or other terms, and is thus more encompassing than using the phrase gay and lesbian couples. For this study, same-sex couples are contrasted with different-sex couples (male/female couples), who represent the vast majority of married and partnered individuals in the United States.

Philanthropy: In this study, philanthropy is defined broadly and includes gifts of tangible resources, including money and in-kind donations, and gifts of time and talent through volunteerism to organizations; it also includes giving to individuals. Payton and Moody (2008) define philanthropy as "voluntary action for the public good" (p. 6) and frame it as an affirmative concept that represents diverse actions. They write that philanthropy is a "multiplicity" and encompasses voluntary giving, voluntary service, and voluntary association. However, most scholarly work on philanthropy does not investigate giving beyond money or time to formal nonprofit organizations. This study aims to take a wider approach, much like Payton and Moody's definition, which they write even includes random acts of kindness. Interview questions were open-ended to allow participants to identify a wide range of philanthropic actions they participated in and as part of their “giving.” As revealed in the findings, in addition to formal philanthropic participation giving time, money, and goods to nonprofit organizations, same-sex couples also engage in informal philanthropy to family, friends, and strangers.

Identity: Identity is a multi-dimensional construct that goes beyond individual demographic categories such as age, race/ethnicity, sex, marital status, etc. that are often analyzed separately in quantitative research using regression models. Identity is also related to difference from the mainstream identities of white, male, and heterosexual. As the late Audre Lorde (1984) observed in an oft-quoted passage:

> As a Black lesbian feminist comfortable with the many different ingredients of my identity, and a woman committed to racial and sexual freedom from oppression, I find I am constantly being encouraged to pluck out some one aspect of myself and present this as the meaningful whole, eclipsing or denying the other parts of self. But this is a destructive and fragmenting way to live.

As Lorde writes, there are also aspects of the self that are not typically considered as part of identity, including values such as being a feminist and being committed to racial and sexual freedom from oppression. Both individual identities and values can be motivating factors that shape philanthropy. Finally, although this study focuses on understanding the role of sexual orientation in philanthropy, it also considers gender, parental status, age, ethnicity, and other important identities that co-exist as part of the self. Feminist researchers use the term “intersectionality” to acknowledge the multiple identities people hold and the ways those identities are situated among larger structures of power and privilege in society (Davis, 2008).

Household Decision-Making: Private households control a large share of financial resources in this country; thus, understanding how households make decisions has implications for economics as well as the beneficiaries of purchase decisions, such as charitable organizations. As Kirchler (1995) states, “Economic and non-economic decision-making processes continue to dominate the day-to-day events in a household and differences of opinion among household members in decision-making situations continue to be the most frequent source of disputes” (p. 394). Kirchler advocates for understanding the context in which decisions are made. He presents several types of decision-making processes, including those that can proceed without prior discussion to those that require more extensive negotiation. A number of factors determine which process actually occurs, including the type of product, the power between individuals, and the quality of the relationship. When relationship satisfaction is high, partners are more likely to put the needs of the other person ahead of their own and make decisions based on the love principle, a harmonious approach toward one another (Kirchler, 1995). This study primarily considers household decision-making in terms of deciding whether or not to give to make philanthropic gifts, and, if so, how much to give. As Kirchler indicates, an important contextual element to this decision is how household finances are managed, a process that often evolves in partnerships over time. Questions about household decision-making and charitable giving were considered in the context of household financial arrangements, conflict, as well as other types of purchase decisions.

Dissertation Overview

The next chapter includes a review of the relevant literature and philanthropic theory applied in the conception and construction of this study. Specifically, the chapter presents a review of literature on motivations for giving, household financial management, charitable decision-making, gender differences in giving, and LGBT philanthropy. Chapter Three focuses on the study design and methods of data analysis and includes sections on the role of the researcher, the use of semi-structured joint interviews, and an overview of the study participants. The descriptive findings are presented in Chapters Four, Five, and Six. Chapter Four provides an overview of the participants' philanthropic participation and behaviors. Chapter Five examines the role of household financial management on charitable decision-making. Chapter Six presents the themes related to the role of identity in giving as well as other motivations for philanthropic participation. Chapter Seven discusses the study's conclusions and implications.

CHAPTER TWO
REVIEW OF LITERATURE

The following section provides an overview on the literature on motivations for philanthropic participation, including social identification theory and approaches to giving by LGBT individuals that are based upon identity. Next, I review the typology for household financial management as suggested by economics and sociology before discussing the research on household charitable decision-making and gender differences in giving. Finally, I conclude by reviewing a small body of recent literature on LGBT philanthropy, with attention to both limitations in the current research as well as the significance of the proposed study.

Motivations for Giving

A significant body of literature on philanthropic behaviors has focused on the motivations for individual charitable giving, emerging from the disciplines of economics, marketing, sociology, psychology, anthropology, and even biology. In a landmark survey of more than 500 empirical studies on giving drawing from these various disciplines, Bekkers and Wiepking (2011) provide a theoretical framework based on eight mechanisms that are determinants for charitable giving: 1) awareness of need; 2) solicitation; 3) costs and benefits; 4) altruism; 5) reputation; 6) psychological benefits; 7) values; and 8) efficacy. This framework is derived from answering the questions, “What is the physical form of the mechanism?” “Is the mechanism located within, outside, or between individuals?” and “Who are the actors and the beneficiaries?” Each mechanism is described below with discussion on how it may be applied to the current study.

In order to engage in philanthropy, one must first have an *awareness of need*. These needs may be tangible or intangible; exist within, between, and outside people; and originate from beneficiaries and target donors (Bekkers & Wiepking, 2011). In short, knowing there is a need for one to give is a prerequisite for deciding to give, and often this awareness is generated through personal involvement or contact with an organization (Burgoyne et al., 2005). Second, *solicitation* refers to the act of being asked to donate, either as a personal request or through a medium such as a letter. Research finds that a majority of all contributions are made in response to a solicitation (Bryant, Slaughter, Kang, & Tax, 2003). Solicitations that involve emotional appeals, evoking empathy, are also effective in motivating people to give (Burgoyne et al., 2005). Third, once a person is aware of a need and/or is asked for a gift, he or she often assesses the *costs and benefits* of donating. Giving involves loss of money, or tangible equivalents such as donated goods or personal time. However, because there is a societal value to monetary giving, individuals can often qualify for tax deductions that reduce the price of giving, making it more likely one will give. In addition, donors may receive benefits in return for such gifts, ranging from access to exclusive services, such as dinners, meetings, or special events; small tokens, such as mugs and tote bags; or private membership benefits, such as those from a church or association. Here, giving reflects a process of exchange and is more akin to a type of consumption. The fourth mechanism, *altruism*, focuses solely on the public benefits generated by donors' contributions (Bekkers & Wiepking, 2011). As Bekkers and Wiepking (2011) conclude that most studies find that donors will contribute even when they are aware that other donors are giving, other motivations are likely more powerful than just the effect that giving has on the beneficiaries.

The fifth mechanism, *reputation*, “refers to the social consequences of donations for the donor,” which are the intangible benefits donors receive, such as an enhanced reputation or social approval (Bekkers & Wiepking, 2011, p. 937). In addition to social benefits, donors may also receive *psychological benefits*, such as a positive emotional response, the alleviation of feelings of guilt, or fulfillment of the desire to give back or express a commitment to a social concern. Burgoyne et al. (2005) describe giving back as reciprocity, either for past benefits received or the idea of investing in one’s future. Similarly, the seventh mechanism of *values* refers to donors’ desires to contribute to changing the world according to their ideas and preferences. Studies on motivations identify giving as a self-expressive act (Burgoyne et al., 2005). Finally, *efficacy* refers to “the perception of donors that their contribution makes a difference to the cause they are supporting” (Bekkers & Wiepking, 2011, p. 942). This mechanism includes the ideas that a donor’s gift is needed, that the organization is well-run, and that the gift will be effective.

Although philanthropic giving by LGBT individuals has not been studied in relation to all eight mechanisms for giving, existing research particularly supports the mechanisms of psychological benefits, values, and efficacy. The literature on LGBT giving suggests that the values mechanism is particularly salient for marginalized populations and incorporates the idea of building and supporting a community with which an individual personally identifies (Garvey & Drezner, 2013b). Research also suggests that, like other donor groups, LGBT individuals seek accountability and professionalism from the organizations they fund, even ones that may be relatively new or largely volunteer-run, which supports the idea of efficacy (Gallo, 2001; Horizons

Foundation, 2008). Cumulatively, however, these eight mechanisms have not been investigated with respect to giving by LGBT individuals.

While the Bekkers and Wiepking (2011) survey of empirical work reveals a number of distinct motivations, they also call for future research that explores how these mechanisms may interact with one another. Qualitative research is an ideal method to suggest mid-range theories of how those interactions may occur. Further, ethnographic studies have suggested other theories focused on donor motivations that reflect a more complex process of philanthropic giving, such as social identification theory.

From their ethnographic work on studying wealthy donors in the Boston-area, Schervish and Havens (1997) developed social identification theory as an alternative to theories of altruism, guilt, *noblesse oblige*, and generalized reciprocity based on trust. They argue that, instead of such selfless motivations, philanthropic, caring behaviors are motivated by the donor's identification with the needs of others, indicating the *presence* versus the *absence* of self (Schervish & Havens, 1997). This idea echoes Alexis de Tocqueville's nineteenth-century observation that American philanthropy was often an expression of "enlightened self-interest." Social identification theory also reveals a relational aspect of giving. It recounts a process of engagement by donors in which the type and degree of empathetic identification with the needs of others generates philanthropic responsibility. Schervish and Havens (2002) developed this theory at Boston College from the notion of *caritas*. They argue that "voluntary action derives from identification, identification derives from encounter, encounter derives from relations, and relations derives from participation" (p. 50), suggesting a theoretical process for how charitable giving may take place. This process would suggest that the motivations of psychological benefits, awareness of need, solicitation, cost and benefits, and even efficacy may form a complex interaction leading someone to engage philanthropically.

As social identification theory highlights the presence of self in motivations for giving, being part of a marginalized community may yield more specific motivations to engage in philanthropy. These motivations may be based on a desire to engage in community uplift (Garvey & Drezner, 2013b), the salience of one's identity (Garvey & Drezner, 2013b), a commitment to social justice (Gallo, 2001; Kendell & Herring, 2001), or seeking social acceptance within the broader society (Flandez, 2013; Horizons Foundation, 2008). Each of these motivations is described further below.

Garvey and Drezner (2013b) draw on two theories to understand the giving of marginalized individuals: community uplift and salient aspects of identity. Within their study of LGBT higher education alumni, many donors gave to support current LGBT students and "uplift" on campus. In focus groups, they found that, while most donors did not explicitly state that their sexual orientation influenced their decision to give, participants subsequently discussed philanthropic priorities that involved supporting the LGBT community. They write, "Many LGBTQ alumni give to their alma mater to make their institutions more welcoming and affirming for LGBTQ students, faculty and staff" (Garvey & Drezner, 2013b, p. 79). Here, personal identity may interact with an awareness of need to create a more accepting campus environment for LGBTQ individuals.

LGBT philanthropy may also emerge from a commitment to engage in social justice and equality-based movements, building on the values mechanism above.

Beginning in the 1960s and 1970s, early gay and lesbian rights organizations, along with small, community-based alternative foundations, emerged to support radical social change, including lesbian and gay organizing (Gallo, 2001; Kendell & Herring, 2001). In addition to supporting LGBT-specific organizations, lesbians, in particular, expressed an intertwined progressive political and philanthropic agenda that included "economic justice, affordable healthcare, and an end to domestic and state-supported violence" (Gallo, 2001, p. 64). While Gallo (2001) calls attention to the difference between lesbians' and gay men's philanthropy, arguing that the AIDS crisis had the unintended consequence of strengthening the capacity of groups run by gay men versus those run by lesbians, lesbians were also finding their place among the larger women's movement. Lesbians' identities as donors may reflect a larger shift taking place among women and giving and the dynamics of money and power (Sabin & Morris, 2001). As Kendell and Herring (2001) write, "It comes back to the personal: giving is another expression of lesbians' personal power" (p. 101). In essence, LGBT individuals may see charitable giving as an expression of social and even political activism, and LGBT individuals may identify with other marginalized populations who experience racism, sexism, and poverty.

A final motivation may derive from a desire for visibility or acceptance in the mainstream community, a motivation that has remained relatively unexplored. Here, LGBT individuals might give to mainstream organizations *as* LGBT individuals as a way to assert their presence in the mainstream. In a small giving circle called "100 Lesbians and our Friends," when participants examined their giving, they found that only a small percentage of their giving went to lesbian causes (Sabin & Morris, 2001). In addition to working to increase philanthropy for LGBT causes, participants used the giving circle name when giving to non-LGBT causes to increase their visibility in the wider community. Similarly, the Horizons Foundation (2008) study revealed that many LGBT donors do not consciously think about their giving in discreet categories or in an LGBT/non-LGBT framework and see their non-LGBT giving as a way of asserting an LGBT presence in the mainstream.

Being part of a marginalized community may also induce certain barriers to giving. LGBT donors may feel shunned from mainstream nonprofit organizations, particularly if there is a historical experience of discrimination (Garvey & Drezner, 2013a; 2013b). In their study of higher education alumni, Garvey and Drezner (2013a) found that experiencing a "chilly" campus climate as a student could later reduce one's alumni participation. Second, individuals who want to give may face a lack of cultural competency on the part of the organization, whether it comes in the form of a "microagression" or overt discrimination (Garvey & Drezner, 2013a; 2013b). In the popular press, gay couples have described situations where organizations used incorrect courtesy titles or did not use couples' preferred terms of partner, husband, or wife (Flandez, 2013). Yet, these barriers are not insurmountable. For example, some organizations have established LGBT affinity groups where fundraisers can develop successful donor relationships (Garvey & Drezner, 2013a). Other examples of cultural competency include making sure organizations have nondiscriminatory policies, celebrating gay pride month, and being comfortable recognizing LGBT donors and couples publically in donor lists and at events (Flandez, 2013). Finally, organizations that have fundraisers who openly identify as LGBT can often use those fundraisers to serve as “insiders” with LGBT donors.

The literature on motivations to give is wide-ranging and draws from a diverse disciplinary base. Literature specific to giving by LGBT individuals suggests that additional motivations may be activated as a result of experiencing societal and legal discrimination. A key element of this research study is to examine how same-sex couples express their motivations and values with respect to their philanthropic participation, both those reflected in the general literature as well as those specific to LGBT individuals. This has the potential to illuminate the complex motivations individuals have to engage in philanthropy and increase our understanding of giving by marginalized populations. As many LGBT people are in long-term, committed relationships, the next section considers how giving may be shaped by the household economy and the interactive process of couples’ decision-making.

Household Financial Management

The sociological and economic literature has investigated the financial arrangements that exist among heterosexual couples, often revealing a power disparity between husbands and wives based on gender (Brown, 2005; Edwards, 1982). Pahl’s (1995) typology provides a helpful, albeit heteronormative[2], framework for understanding the potential ways money can be managed within the household based upon whether couples act as a single economic unit or as two separate (individual) economic units. Pahl (1995) suggests there are four primary financial arrangements,

[2] As Burns, Burgoyne, and Clark (2008) note, “Pahl’s model presupposes a male/female partnership or heterosexual marriage and does not acknowledge this assumption” (p. 483).

which I have amended to remove specific gender dynamics, thus allowing them to apply to same-sex couples:

1.) *The whole wage system*—one partner manages all income and distributes some money to the other partner. (For heterosexual couples, Pahl breaks this into two systems, one managed by the husband; the other, by the wife.)
2.) *The housekeeping allowance system*—one partner gives the other partner money to pay for daily household expenses and retains control of the rest of the money and pays for other items.
3.) *The joint pooling system*—all of the household income is shared, usually in a joint account that both partners have access to, and they spend money out of this common pot.
4.) *Independent management system*—each partner keeps their own income separate and may divide costs equally or be responsible for different areas of household expense. In order for this scenario to take place, both partners must earn income.

While this typology is widely used, more recent research suggests a fifth approach, which may reflect more current household arrangements: the partial pooling system, whereby couples pool some money for common expenses and retain individual control of the rest (Burgoyne, Reibstein, Edmunds, & Dolman, 2007; Wiepking & Bekkers, 2010). Burgoyne et al. (2007) suggest this system is gaining in popularity.

While theories of household decision-making have been based almost exclusively on heterosexual couples, research shows that economic clout within a marriage matters for how money is spent (Brown, 2005). In Edwards' (1982) study of 50 Australian couples, 25 couples engaged in whole-wage management where the wife had control, while in seven couples, the husband managed the finances totally. In another seven couples, finances were managed jointly, and 11 couples practiced an independent management system. Edwards (1982) found that independent management became more common as the income of the wife increased. In Pahl's (1995) study very few (2%) couples practiced independent management. Pahl also found that women were more likely to manage finances when households had lower incomes. Consistent with other research, Edwards (1982) found that, for the majority of couples where the wife did not earn an income, the husband either managed the finances directly or gave his wife a housekeeping allowance. Similarly, Pahl (1995) also found that the housekeeping allowance was associated with the man being the sole or main earner and that joint pooling was more common when the wife was also in full-time employment and made a significant contribution to the household budget.

More recent studies on heterosexual couples find that the partner with more education and more earnings typically has more influence within the economic decision-making of the household (Andreoni et al., 2003; Brown, 2005; Wiepking & Bekkers, 2010). This finding was similar to Pahl's (1995) research showing a significant association between the balance of power in the household and the way money was managed. Couples who used joint management systems were more egalitarian than those using male management systems, which typically also have more male control (Pahl, 1995).

In a more recent study focusing on money management systems in early marriage, Burgoyne, et al. (2007) find that heterosexual couples are more likely to have independent financial management systems or partial pooling prior to marriage but move to more collective systems within a year of marriage. They attribute this change to individuals' view of marriage as sharing "collective resources" (p. 223). In a similar interview study with gay and lesbian couples in England, Burns, Burgoyne, and Clarke (2008) find the majority of couples use either a partial pooling or independent management system, but they note the complexity of money management in practice; the majority of couples were also dual earners. Researchers have theorized that gay and lesbian couples who have separate finances do not reflect "disunity or lack of commitment to the relationship, but rather as Weeks et al. (2001) suggest, 'separate financial lives can be symbolic of the ethic of co-independence which underlies the operation of same-sex relationships' (p. 100)" (as cited in Burns et al., 2008, p. 485). In a study focused on intra-household bargaining, Oreffice (2011) finds that gay and lesbian households are also affected by bargaining power forces, though these couples are more similar to cohabitating heterosexual households than to married couples, consistent with prior research. Among same-sex couples, being younger and having greater wealth in the form of non-labor income leads to a reduction in that partner's labor supply and greater bargaining power, compared to married heterosexual households where the older spouse has more bargaining power (Oreffice, 2011).

Understanding these larger household economic arrangements is important for understanding how charitable giving decisions are made. Burgoyne, Young, and Walker (2005) argue that charitable giving is an interactive process in the household, emerging from the system of financial organization a couple uses, which, in turn, can influence the degree of individual financial control. While patterns of household financial management may differ for same-sex couples, no existing research has investigated this question from the perspective of charitable giving. Further, do larger donations reflect the dominant practice of household financial management, and does access to personal spending money yield additional resources from which smaller charitable gifts are made? The next section reviews the existing research on household charitable decision-making, as well as how men and women differ in philanthropic giving.

Household Charitable Decision-Making

Researchers from the United States and Europe have investigated how charitable giving decisions are made in the context of the household economy, in essence, as couples. As Mesch and Pactor (2016) argue, "Focusing only on individual respondents, without considering the dynamic that is going on within the household in making charitable giving decisions, may leave out important information about giving" (p. 92). While being married potentially increases the financial resources available to individuals within a couple, they must then bargain on how to spend, or not spend, those resources (Brown, 2005). In the United Kingdom, Burgoyne et al. (2005) find charitable giving adheres to the style of money management in the household, although it occupies a more marginal position. Larger, more structural donations are decided jointly, whereas incidental donations are more individual decisions (Burgoyne et al., 2005).

A majority of couples report making charitable decisions together, and marriage is often a predictor of couples deciding jointly (Brown, 2005; Wiepking & Bekkers, 2010; Yörük, 2010). In a study of Dutch households, Wiepking and Bekkers (2010) find 84% of couples act as one economic actor, whereas 16% act individually. Of those acting together, 72% report making decisions jointly, whereas in 18% the female partner decides, and in 10% the male partner decides. Andreoni et al. (2003) find that, within married households in the United States, 53% of decisions to give to charity are made jointly, 28% primarily by the woman, and 19% by the man, with any conflict tending to be resolved in favor of the man. In a separate study based on the 2003 Panel Study of Income Dynamics (PSID) survey in the United States, 74.2% of households reported making decisions together, 7.3% by the wife, 3.3% the husband, and 15.3% individually (Brown, 2005). Looking at two years of PSID data, however, shows that roughly a quarter of the married couples appearing in both the 2003 and 2005 waves changed their self-report of their decision-making strategy (Brown et al., 2010). Finally, couples who have experienced marital disruption are more likely to decide separately on financial matters (Wiepking & Bekkers, 2010).

There is mixed evidence over whether bargaining in joint decision-making reduces or increases the amount given to charity (Andreoni et al., 2003; Brown, 2005; Brown et al., 2010). Andreoni et al.'s (2003) study, which is based on surveys conducted in 1992 and 1994 for Independent Sector, finds that, when couples decide together, bargaining reduces giving on average by 6%. Yörük (2010) replicated the study of Anderoni et al. (2003) with the 2003 PSID data and finds that jointly-deciding households give more than economists would predict from the behavior of households with a sole decision-maker. Specifically, Yörük (2010) finds that bargaining increases household giving by about 7%. Using data from the 2005 PSID, Brown et al. (2010) support Yörük's finding that couples who decided jointly gave more than couples in any other decision-making configuration.

Gender Differences in Charitable Behavior

Research also demonstrates that men and women behave differently when giving to charity. Studies of the Philanthropy Panel Study data reveal that single female-headed households are both more likely to give to charity and to give larger amounts than male-headed households, across all income levels (Mesch, 2010; Mesch & Pactor, 2016). By looking exclusively at single-person households, Andreoni et al. (2003) find men and women have significantly different tastes in giving, including propensities to give, the amount they give, and the distributions of those gifts, which would set up a conflict for married heterosexual couples, but one that is potentially reinforced by same-sex couples. In contrast, however, Yörük (2010) finds that, among single men and women, when looking at total contributions, there is no difference in the propensity to give or amount given.

Both survey and experimental data suggest that men are more responsive to the personal costs associated with giving, such as receiving a tax benefit, whereas women are more likely to give even when the price of giving is high (Andreoni & Vesterlund, 2001; Andreoni et al., 2003; Yörük, 2010). In contrast, women tend to give to a greater variety of charitable causes but tend to give smaller amounts to each (Andreoni et al., 2003; Yörük, 2010). Brown (2005) suggests that "one unifying interpretation of these differences is that women are more egalitarian in their giving, while men are more strategic" (p. 74). In examining household giving based on whether the husband, wife, or couple decided, women were more likely to give to health and education causes than if either the husband decided or the couple was jointly in charge. Women were more likely to give to religion than if the couple decided jointly, and men were more likely to give to adult recreation than if the couple decided jointly (Andreoni et al., 2003). The present study will assess how gender and sexual orientation may interact to influence the decision-making of same-sex couples, particularly how the practices of gay male couples may differ from lesbian couples. The final section considers the existing research on LGBT philanthropy.

Research on LGBT Philanthropy

Finally, while existing research on LGBT philanthropy is small, it is starting to grow. A significant focus of the current research has focused on philanthropic support directed specifically to LGBT nonprofit organizations (Horizons Foundation, 2008). The LGBT movement emerged in the 1970s from the societal and legal discrimination of individuals and groups based on sexual orientation and gender identity. Like many other social movements in the United States, the LGBT movement formalized through the incorporation of organizations in the nonprofit sector (Gallo, 2001). Nonprofit organizations that serve LGBT individuals include those providing direct services, advocating for equality, and supporting people living with HIV/AIDS (Gallo, 2001; Horizons Foundation, 2008). Historically, foundations have provided scant funding to LGBT organizations, with estimates showing as little as 0.5% of foundation funding goes to LGBT groups (Gallo, 2001). While giving to LGBT organizations is a subset of total giving by LGBT individuals, LGBT individuals are the most likely donors for LGBT organizations (Horizons Foundation, 2008; Sabin & Morris, 2001).

A study by Horizons Foundation (2008) found that many LGBT nonprofits are young and have struggled to develop their capacity to consistently raise enough money to carry out their missions. This study also found that just 5% of LGBT individuals in the

San Francisco Bay Area gave to a national or regional LGBT organization in the past year. In contrast, about 13% of LGBT individuals gave to an HIV/AIDS organization (Horizons Foundation, 2008). As noted, in many respects, the AIDS crisis strengthened the capacity of many LGBT organizations run by gay men, versus those run by lesbians, which are more likely to be supported with a largely volunteer staff and a large donor base of small donations (Gallo, 2001). The Horizons Foundation (2008) also identified planned giving as an important strategy for LGBT nonprofit organizations to build endowment support and an opportunity for LGBT individuals without children to make bequests. Increasing donor loyalty and attracting new donors are urgent priorities for many LGBT organizations. These findings also highlight the need for more research to help LGBT nonprofits better understand the perspectives of current donors, their motivations, and their behaviors in order to strengthen their fundraising capacity.

Current Research Limitations

Despite growing research on LGBT philanthropy, wide gaps in knowledge persist, and more rigorous research is needed to understand LGBT giving. Current research has focused largely on giving to LGBT organizations, neglecting a full understanding of how LGBT individuals are philanthropic actors in their wider communities. Relatedly, by surveying donors who are already giving to LGBT organizations, findings may represent a more “out” or openly-identified group of LGBT donors as well as a more philanthropically inclined group. Second, only the Horizons Foundation (2008) study surveyed LGBT donors about their giving motivations. Additional research is needed to understand how LGBT donors’ motivations both reflect and are different from heterosexual donors. Further, social identification theory may provide a potential process to understand how motivations interact with one another. Third, in contrast to Garvey and Drezner's (2013a; 2013b) work, which focuses exclusively on giving to higher education, this study seeks a broad understanding of same-sex couple's philanthropy, including their giving practices across all types of organizations, motivations for giving, and how they make decisions about giving. While these studies provide valuable context for LGBT giving, it is also important to understand a more holistic picture that reflects individuals' multiple identities. For example, LGBT people may also identify as men or women, parents, seniors, members of racial and/or ethnic communities, members of a particular religion, or other identities linked to their hobbies or professional interests.

This is the first study to examine the philanthropic giving of same-sex couples in an effort to understand same-sex couples' financial arrangements and charitable decision-making. Existing knowledge of couples' financial arrangements has focused almost exclusively on different-sex couples, and same-sex couples' economic arrangements may differ from the dominant patterns reported in the literature. Further, as prior research has also found differences in giving based on gender, same-sex couples may demonstrate different behaviors, not just as a result of sexual orientation, but also because of their genders. Finally, qualitative methods will offer a richer understanding of both donors' motivations and practices as relatively few studies have examined giving from the perspectives of the givers themselves. The next section discusses the study's methodology in more detail.

CHAPTER THREE
METHODS AND RESEARCH DESIGN

As little research exists on the philanthropic practices of LGB individuals, and particularly the experiences of couples, this study employs a qualitative research design. Qualitative methods are particularly suited for research questions where theory is under-developed; these methods also hold significant value for allowing members of marginalized populations to share their experiences in their own words (Creswell, 2013; Esterberg, 2002). This chapter describes the distinctive nature of qualitative research, the procedures for this particular study, an overview of the study participants, the methods of data analysis, and the limitations of the study.

Overview of the Qualitative Approach

Qualitative research is distinct in several respects from quantitative approaches, such as surveys and experiments, which dominated the literature review in Chapter Two. First, researchers collect qualitative data in a natural setting, often through face-to-face interaction with participants (Creswell, 2013; Patton, 2002). Second, in qualitative research, the researcher is a key instrument in data collection (Creswell, 2013; Merriam, 2002a). Therefore, researcher reflexivity is important in order to understand how the researcher's own "position" or presence may influence the research process. The role of the researcher is discussed in more detail below. Third, qualitative research takes an inductive approach that is guided by a search for meaning and understanding of a phenomenon based on the rich description of the research participants, rather than proceeding directly from existing theory (Creswell, 2013; Merriam, 2002a). While theories of household decision-making and charitable giving provide a starting point for the present study, existing theories may not apply to same-sex couples in the same way.

Fourth, qualitative research follows an emergent design, which allows for modifications based on the data collection process (Creswell, 2013). Again, this relates directly to the focus on the participants' meanings, which may vary from prior literature. Finally, qualitative research seeks to understand a diversity of perspectives and multiple, subjective views to form a holistic, richly descriptive, and complex account of the problem under study (Creswell, 2013; Merriam, 2002a). The focus on participants' experiences and the presence of multiple realities distinguish qualitative research from other modes of inquiry and also reflect an interpretive approach (Esterberg, 2002). As such, a qualitative research design makes the most sense for this study, as it aims to discover and describe the charitable giving experiences form the perspectives of same-sex couples themselves.

The research design also is guided by a symbolic interactionism perspective and a feminist approach. Symbolic interactionism is an interpretive approach based on three premises: 1) humans' action is based on the meanings given to certain objects and events; 2) that meaning is created through a process of social interaction; and 3) that meaning itself is created through a process of interpretation rooted in a social process (Esterberg, 2002). As a human endeavor, philanthropic action exists in a societal and relational context and is interpreted as such by the actors themselves. Therefore, interviewing individuals about their philanthropic experiences allows us to understand how individuals construct and make sense of philanthropic participation.

This study also takes a feminist research approach, as it focuses on empowering individuals to tell their stories and acknowledges both the power relationships and unequal structures within the larger society that govern individuals' lives (Esterberg, 2002). In addition to studying individuals' philanthropic experiences and meanings, this research also seeks to understand the experience of discrimination and stigma that can result from having a minority sexual orientation. These experiences are not limited to women but apply to gay and bisexual men as well. This research situates same-sex couples as philanthropic actors and brings to the forefront the experiences of a marginalized group of people in adding to theory about charitable giving. While not all qualitative research is feminist, both qualitative and feminist research allow for individual and varied experiences to be told, and both can recognize the political, social, and historical systems that govern our lives (Creswell, 2013; Guba & Lincoln, 1994; Patton, 2002).

Feminist researchers are also concerned with minimizing the power imbalance inherent in the researcher/participant relationship (Creswell, 2013; Patton, 2002). Christians (2000) argues that feminist research should not only represent multiple voices, but also aim to develop collaborative relationships between researchers and participants that embody a relational ethic and a human concern, where the researcher ethically engages with the unequal power dynamic and often attempts to reduce it. Finally, the feminist perspective also believes that change is possible. Through a relational and dialogic process between the researcher and participants, feminist research can offer critique and promote social transformation (Christians, 2000; Guba & Lincoln, 1994). A feminist approach is well-suited for the study of marginalized populations such as LGB individuals.

As this study examines charitable giving at the household level, it also allows participants to define and construct their definition of a household, the meaning of their relationship, and their involvement in philanthropy, empowering individuals to tell their stories and self-define such terms. In addition to honoring participants' self-definitions, this study provides further insight into philanthropy's transformational possibilities for community uplift and social change as well as its potential constraints.

The Role of the Researcher

A key aspect of qualitative research is the researcher's own background and positionality in the research process. Several years ago, and prior to beginning my doctorate degree, I attended a conference for fundraising practitioners where there was a presentation on gender differences in philanthropic giving. During the presentation, a member of the audience asked how those findings applied to same-sex couples. The answer? We simply didn't know. No one had conducted the research yet. Three years later, that research question remained largely unanswered, forming the impetus for this study. As qualitative research relies on the researcher as a key instrument in data collection, it is important for researchers to reflect on the biases that they bring to their research. Doing so involves examining the political, social, and cultural context of the researcher and her past experience with the phenomenon, considering how such experiences may affect the research (Creswell, 2013; Merriam, 2002a; Patton, 2002). Similarly, feminist approaches maintain a heightened awareness of the position of the researcher within the study and argues that researchers need to systematically reflect on their own roles within the research in order to address the power differential between researchers and participants (Christians, 2000; Guba & Lincoln, 1994; Lather, 1991).

For the purpose of this study, it is important to acknowledge my own experience as a married lesbian who has participated philanthropically in a range of formal and informal ways. This position has served to pique my interest in these research questions and has made me aware of both the systematic discrimination same-sex couples face as well as the everyday realities of making economic decisions within a same-sex household. Therefore, I am an "insider," as I have my own direct involvement and connection with the subject of this research and share a marginalized sexual orientation with the participants. While a frequent critique of insider status is that it may threaten a researcher's ability to offer a trustworthy interpretation of the data, an insider perspective also has the potential to increase validity, as participants may feel more comfortable sharing their experiences with someone who shares similar characteristics (Rooney, 2005). What is most important is that the researcher is aware of his/her own biases and that the insider relationship is honest and transparent (Rooney, 2005). Therefore, as this study seeks to broaden our understanding of the wide range of same-sex couples' philanthropy and the way these couples engage in philanthropy in their lives, I approached participants with openness about my sexual orientation in order to enhance participants' willingness to participate and minimize the social distance between us. However, beyond disclosing that I was a married lesbian who was interested in this topic, I withheld additional information about our personal philanthropy and household financial management in order to allow participants to share their experiences without comparison or judgment.

Data Collection: The Semi-Structured Joint Interview

Following a qualitative approach, I conducted semi-structured joint interviews with same-sex couples to understand their charitable giving, household decision-making, and motivations to engage in philanthropy. Interviews are commonly used in qualitative research, as they allow participants to tell their stories in their own words and highlight how participants experience and understand their world (Kvale, 2007). This approach is particularly important when trying to understand minority perspectives. Unlike an individual interview, a joint interview is where one researcher interviews two people together, often in the context of marital relationships or people living together as couples (Arksey, 1996). Few qualitative methodologists consider the joint interview in any significant detail and typically categorize interview methods as either individual or group interviews, the latter where participants usually are not known to one another (Arksey, 1996; Bjornholt & Farstad, 2014). Relatedly, there is an unspoken assumption that the individual interview is closest to the voice of the interviewee and is thus preferred; however, the joint interview provided an ideal setting in which to understand same-sex couples' charitable giving.

Bjornholt and Farstad (2014) outline several advantages of the joint interview among a partnered couple. First, instead of having the researcher potentially piece together confidential or sensitive information through individual interviews, by interviewing couples together, they write, "the participants have more control over the common story of which they are a part" (Bjornholt & Farstad, 2014, p. 6). Like focus groups, joint interviews provide a common reflective space where couples can produce rich data through their interaction, helping one another divulge and explain information (Bjornholt & Farstad, 2014; Wilkinson, 2003). Therefore, interviewing both members of a couple together helps elicit participants' ideas, opinions, and understandings by triggering memories, stimulating debate, and facilitating disclosure (Wilkinson, 2003). A couples' interview also offers the researcher the opportunity to observe intra-couple dynamics, including interaction, communication, sense-making, and even observational data, adding valuable additional information (Bjornholt & Farstad, 2014). As Bjornholt and Farstad (2014) write about the couples who participated in their research, “their turn-taking and communication with each other meant that the picture that emerged of them as a couple was more nuanced” (p. 9). Finally, while some literature on the joint interview assumes couples will strive to tell a favorable story akin to a social desirability bias, Bjornholt and Farstad (2014) repeatedly found that disagreements and contentious discussions became evident among couples, even with the researcher present. Allowing these conflicts to be debated openly also results in richer data.

As with all interviews, limitations do exist, and researchers need to be mindful of the ethical issues inherent in the method. While the joint interview can provide rich data, troublesome issues may be revealed if couples bring up antagonisms or conflicts of interest (Arksey, 1996). Logistically, some researchers find joint interviews easier to schedule (Bjornholt & Farstad, 2014), whereas others report greater difficulty in eliciting involvement (Arksey, 1996). Joint interviews also need to be managed so that one person does not dominate the other during the interview (Arksey, 1996). While joint interviews, like all interviews, are not generalizable due to the small sample size, this study recognizes the overall advantages of the joint interview as a method to understand philanthropic behaviors within households.

For this study, 19 in-depth, semi-structured joint interviews were conducted at a location of the participants’ choice. Interviews ranged in length from 38 to 92 minutes, with most interviews lasting 60 to 75 minutes. Each interview focused on the participants’ experiences with philanthropy and the meanings they ascribed to those experiences using a semi-structured interview format (Kvale, 2007). As described above, I initially used my “insider” identity to build rapport with couples but then remained open to understanding the range of same-sex couples’ philanthropic behavior (Esterberg, 2002). The interview protocol was developed based on two prior qualitative studies of charitable giving and included replicable questions, as well as new questions specific to this study (Burgoyne et al., 2005; Einolf & Brown, forthcoming). The protocol (see Appendix A) contained open-ended questions related to the participants’ experiences of giving to organizations and individuals, motivations to give, charitable decision-making, management of household financial resources, and any changes in giving over time. Participants were asked to compose a list of their prior year’s charitable contributions in advance of the interview to serve as a basis for interview questions and a memory prompt.

Interviews were digitally audio-recorded and subsequently transcribed verbatim. To ensure the privacy of the participants and confidentiality of donation information, interview transcripts were de-identified, using pseudonyms for participants and more general names for charitable organizations (e.g. university or homeless shelter instead of the specific nonprofit’s name). In the findings, quotations may be slightly edited for clarity and readability but retain the participant’s intent and meaning. Finally, couples were not paid to participate in the study. However at the conclusion of the interview, participants were offered the opportunity to have a $25 donation be directed to the charity of their choice. This donation allowed each couple to make a philanthropic decision in front of the researcher and was considered as part of the data collection.

Sample and Study Participants

Participants for this study were identified and recruited through a combination of purposeful, quota, and snowball sampling (Creswell, 2013; Patton, 2002). In spring 2014, a pilot study was conducted with four same-sex couples in the greater Indianapolis area. At the time of the interviews, Indiana prohibited same-sex marriage. In order to explore differences in philanthropic giving with respect to gender, the pilot study included two gay male couples and two lesbian couples. These pilot study interviews informed the final research design and are included in this study. An additional 15 interviews were conducted between May and August 2015, which included eight same-sex male couples and seven same-sex female couples. Between the pilot study and the 2015 interviews, same-sex marriage became legal in Indiana, and in June 2015, the United States Supreme Court declared that same-sex marriage was a constitutional right, making same-sex marriage legal across the country.

All potential study participants completed a series of screening questions in advance of the interview (see pre-screening interview protocol in Appendix A). The criteria to participate in the study included the following:

- Be aged 21 or older;
- Self-identify as lesbian, gay, bisexual, transgender (LGBT), and/or currently be part of a same-sex relationship;
- Have been in their current same-sex relationship for at least one year;
- Reside at the same address with their same-sex partner;
- Live in the state of Indiana;
- Have participated philanthropically in the past year;

- Be willing to discuss their charitable giving practices together with their partner and with the researcher.

As there is little to no current research in this area, no further restrictions were placed on participants' other characteristics in an attempt to recruit a diverse and heterogeneous sample. Efforts were made to recruit couples with and without children, couples with different lengths of relationships, couples who were legally married and those who were partnered but not married, couples with different household incomes, couples who identified as religious, and couples with a variety of races and/or ethnicities. Even within a small sample, this diversity allowed for the researcher to explore a range of complex interests and identities that may guide philanthropic behavior. Because the majority of U.S. households participate in philanthropy, no minimum giving amounts were used. Rather, couples were recruited with the knowledge that the interview would explore their philanthropic behavior, whether that involved making only a few charitable gifts each year or being major philanthropic supporters.

Same-sex couples were predominantly recruited through snowball, or chain referral, sampling using key informants, LGBT listservs, and through the participants themselves (Esterberg, 2002; Patton, 2002). Key informants included several nonprofit fundraising professionals who worked with same-sex donors in their organizations. These informants were asked to identify couples who had a rich experience in relation to the research questions of interest (i.e. philanthropic giving, giving as a couple, giving based on identity and values) (Merriam, 2002a; Patton, 2002). Informants were provided with general information on the nature of the study and the researcher's contact information to share with potential participants. Interested couples then self-selected into the study by contacting the researcher. Second, the researcher used targeted sampling and shared information about the study on several LGBT listservs in the study region, including with two large employers' LGBT networks. Finally, additional participants were recruited through snowball sampling of participants themselves, who connected me with other same-sex couples they knew, particularly as I attempted to recruit an equal number of male and female couples. In total, 38 unique individuals are included in this study, representing 19 distinct couples.

The primary goal in sampling was to reach participants who were information-rich cases, in other words, "sampling for meaning" among individuals who have both a minority sexual orientation and experience with philanthropy (Luborsky & Rubinstein, 1995). Second, according to Small (2009), applying case study logic to a sequential interview-based study means that each case, or interview, provides an increasingly accurate understanding of the research question. As the interviews progressed, particularly after 15 were completed, themes began to repeat indicating a level of saturation (Baker & Edwards, 2012; Small, 2009). Couples also began to re-refer participants in the study who had already been interviewed.

Study participants were diverse in a number of ways, and yet also represent a highly educated and employed sample. Table 1 summarizes the participants' individual background demographics, and Table 2 summarizes the demographics at the household level. Appendix D provides a complete list of the participants with individual and couple demographic characteristics. Participants were split nearly equally among male and female couples. The majority of participants (61%) identified as gay, which included some women. Two participants identified as both lesbian and bisexual, one woman identified as bisexual, and one woman who was married to a woman identified herself as “sexual” and then used the term lesbian. While a majority of participants did not have children, five couples were currently raising children together, and five individuals had adult children from previous relationships. Participants ranged in age from 29 to 66 with an average age of 47.5 years old. The majority of participants were employed (92%), which means that many households had two incomes. The sample was highly educated, with all but one person holding a college degree; further, 42% of participants had master’s degrees, and 24% had doctorate or professional degrees. More than one-third (39%) of respondents reported being religiously affiliated. Nine individuals had been previously married or in long-term same-sex partnerships prior to their current relationship; six participants had been previously married to different-sex partners, and three participants had been in a long-term relationship with a same-sex partner. Participants were not asked to identify their racial or ethnic identity, but the vast majority of participants were white. Two participants identified as being from countries in South America during their interview.

Table 1: Demographics of Individual Study Participants

Demographics	%	N	Demographics	%	N
Gender			**Employment**		
Male	53%	20	Full time	82%	31
Female	47%	18	Part time	10%	4
Sexual orientation			Retired/Disabled/Not working	8%	3
Gay	61%	23	**Highest Education Level Completed**		
Lesbian	37%	14	High School	3%	1
Bisexual	8%	3	Bachelor's Degree	32%	12
Has children			Master's Degree	42%	16
None	61%	23	Doctorate/M.D./J.D.	24%	9
Aged 0-18	26%	10	**Religious**		
Aged 19 or older	13%	5	Yes	39%	15
Age (Range 29-66; Mean 47.5)			No	61%	23
25-34	18%	7	**Previously Married?**		
35-44	21%	8	Yes	24%	9
45-54	29%	11	No	76%	29
55+	32%	12			

At the household level, the majority of couples (63%) had legally married at the time of the interview. Additionally, several couples reported being engaged or were considering marriage in the future. Participant couples had been in their relationships from a minimum of five and a half years to as long as 28 years, with 47% being together for between five and nine years. The average length of couples' current relationship was 13 years. Most couples reported that they began living together between six and 12 months of beginning dating. As most individuals in the sample were employed and had high educational status, many households reported a high combined household income. Only three households reported making less than $100,000 in the past year. The majority of couples (53%) earned between $100,000 and $249,999, and six couples earned more than $250,000 in the past year. Many individuals were in their late 40s to early 60s, likely representing their peak earning years. Some of the similarity within the sample may be due to the snowball sampling method in which participants referred other couples who were like themselves.

Table 2: Household Demographics

Demographic (Household)	%	N
Legally Married		
Yes	63%	12
No	37%	7
Relationship Length (Range 5.5-28 years; Mean 13)		
5-9 years	47%	9
10-19 years	26%	5
20 years+	26%	5
Has children		
Yes	26%	5
No	74%	14
Household income		
$0-99,999	16%	3
$100,000-$249,999	53%	10
$250,000-$499,999	26%	5
$500,000 or more	5%	1

Data Analysis

This study used an inductive analysis with grounded theory techniques to make sense of the data (Charmaz, 2003; 2014). Grounded theory techniques are ideal for this study, as they seek to both describe the experiences of same-sex couples' philanthropic engagement and discover the social processes at work in that engagement. Grounded theory methods are an inductive strategy to collect, synthesize, analyze, and conceptualize qualitative data to construct theory (Charmaz, 2003; 2014).

Data analysis began with the first interview, as collecting data offers opportunities to follow leads that emerge and probe for new understandings; analysis is thus iterative and ongoing (Charmaz, 2014). Therefore, new lines of inquiry can be added in later interviews as analysis develops. For example, the topic of making a legacy or planned gift was not included on the interview protocol but was added as the interviews progressed. Second, per grounded theory, I also tested my emerging findings as I conducted additional interviews and collected new data (Charmaz, 2014). In this way, data is compared across cases and allows for the refinement of theoretical concepts.

Each interview was transcribed verbatim and checked for accuracy. Once transcribed, I approached the analysis by asking the question, "What is happening here?" (Glaser, 1978 as cited in Charmaz, 2014). Following grounded theory techniques, I began coding interviews line-by-line, labeling small excerpts of data with a short name that summarized and accounted for each piece of data (Charmaz, 2003; 2014). After coding four interviews using this process, I began more focused coding, using the most frequent and significant codes in analyzing the remaining 15 transcripts (Charmaz, 2014). I developed analytic codes and categories directly from the data, rather than applying preconceived categories or codes. In this way, I stayed close to the data and was able to compare codes to data throughout the analysis. As qualitative research develops significant amounts of data, I used NVivo 10, a qualitative computer data analysis program, to help manage the interview data.

As coding progressed, I began writing memos based on the focused codes. This process allowed me to analyze the data and codes and begin to develop emerging categories. By reflecting on the data through writing, I was able to draw connections and comparisons between individual interviews or cases (Charmaz, 2003; 2014). I also wrote a memo on each individual couple, which allowed for further comparison across cases at a more abstract level. In presenting a richly-detailed account, I tried to remain loyal to participants' own words and descriptions whenever possible (Kvale, 2007). The written memos allowed me to integrate the words and experiences of the participants into the themes I present in the following chapters. These conceptual themes include philanthropic participation, household financial management and charitable decision-making, the role of identity, and motivations for giving.

Ethical and Trustworthiness Considerations

Ethical issues are part of any qualitative research project involving researchers and participants and should be considered from the beginning of an interview study (Creswell, 2013; Kvale, 2007). As a feminist researcher, I am also concerned about the power issues within research and the disparity of power between me as the researcher and the participants (Christians, 2000). I used several techniques to ensure the centrality and confidentiality of the participants. First, I conceptualized this study with the objective that this research will serve a larger purpose to legitimize the philanthropic contributions of LGBT people and empower the LGB participants. Second, per university policy, the study procedures and the interview protocol were submitted and approved by the Indiana University Institutional Review Board. Third, at the time of the initial contact and at the interview, participants were informed of the nature of the study and asked to provide their consent. Participants were encouraged to select an interview location that was safe, private, and convenient. The vast majority of interviews were conducted in participants' homes. Finally, data collected in the study were secured on password-protected computers, and the identity of the participants remained confidential through the use of pseudonyms for the participants and general names for the nonprofit organizations.

As the aim of qualitative research is to generate high-quality findings that reflect a goal of "understanding" (Creswell, 2013, p. 243), I used a variety of techniques to promote trustworthiness and establish credibility. This study employed the following strategies: researcher reflexivity, line-by-line coding, detailed field notes, an audit trail, peer review, audio recording, verbatim transcription, and inclusion of rich, thick description (Merriam, 2002b). As an insider, researcher reflexivity was critical to acknowledge my own personal experience with charitable giving and fundraising in order to avoid imposing my own subjective experience on the data and overlooking the experiences of the participants. Similarly, the process of line-by-line coding helped to reduce potential researcher bias, as all data are considered in the analysis (Charmaz, 2014). To enhance validation, I kept ongoing field notes during data collection and analysis to document how decisions were made (Esterberg, 2002).

I employed peer review at several different points of the study, including during the research design and data analysis to minimize potential researcher bias (Merriam, 2002b). Two peer reviewers provided an external check on the research process by reading the interview transcripts and subsequent memos and interpretations and asking questions about the methods and meanings generated. At times, these two reviewers also acted as "devil's advocates," pushing back on interpretations and asking for further data or clarification (Creswell, 2013). To enhance generalizability to other contexts, I include rich, thick description of participants' own words with the attention to similarities and differences across the participants in the findings (Merriam, 2002b). Finally, by using audio recording, verbatim transcription, and open-ended interview questions, I am able to present the participants' words as they told them and was able to remain open to new findings that were told by the participants' themselves.

Limitations

Qualitative interview studies rely on the researcher's ability to develop rapport with the participants in order to collect rich data (Esterberg, 2002). As a married lesbian, I shared key social characteristics with the study participants. During the screening process, I shared with participants how I became interested in this research, in order to begin building rapport for the joint interview. Additionally, with a professional background in philanthropic fundraising, I am experienced in discussing philanthropic giving with individuals. Thus, I was attentive to rapport and comfort levels in discussing specific gift amounts and household finances, even though money continues to be a taboo subject to discuss in American society. I encouraged participants to be as forthcoming about their charitable giving as possible to promote understanding about philanthropic practices, and maintaining participants' confidentially was of utmost importance. Still, gathering accurate and insightful data about money and household finances remains challenging in American culture, even when considering money in the positive context of how it may be used for the benefit of others, as philanthropy is often understood.

Second, as this study focused on the experiences of same-sex couples in Indiana and used a qualitative approach, these findings are not generalizable to the entire population of LGB couples. Unlike quantitative or survey studies, qualitative research does not seek to generalize to the larger population but instead finds value in the particular, leading to new insights and understandings (Merriam, 2002b). Still, findings from this study can provide analytical generalizability where the findings can help to refine existing theory, which can then be used to test other cases (Yin, 2002). Restricting this study to one state also is a limitation, however it held the geographical setting constant at a time when state-specific laws were quickly changing; as such, the geographical setting is also a strength.

Finally, while I endeavored to recruit a diverse group of participants, using snowball sampling for a portion of the recruitment resulted in some homogeneity within the sample. While participants were fairly evenly split by gender, diverse in age and relationship length, and represented both parents of children and couples without children, almost all were college-educated, had above-average incomes levels, and high philanthropic participation. As mentioned in the sample description above, the sample did not include much racial or ethnic diversity aside from two participants who had moved to the United States from South America. This means that certain experiences may remain unexplored and unrepresented in this study's findings, although the phenomenon under study, the philanthropic engagement of same-sex couples, was extensive among the study population.

Remaining Chapters

The study findings are presented in the following three chapters. Finally, Chapter Seven includes the discussion, conclusions, and recommendations.

CHAPTER FOUR
PHILANTHROPIC GIVING AND VOLUNTEERING

Like many Americans, gay, lesbian, and bisexual individuals participate in philanthropy in a variety of ways, from donating to one's church or joining a local public radio station to giving gently-used clothing and toys to local organizations or supporting theater and dance. Much of the current household charitable giving research, conducted through large-scale surveys, asks participants to report exactly how much money they donated to a variety of charitable purposes, including religion, education, health, human services, arts and culture, and so on. Some of these studies also ask respondents about their volunteerism, or gifts of time, but not all studies ask these questions together. Occasionally, these studies ask respondents to report their "in-kind" giving, or gifts of material goods, which can be included as part of one's annual charitable contributions reported to the Internal Revenue Service (IRS). When researchers want to understand individuals' philanthropy and the meaning behind it, having a full description of where and what people actually give is a good place to start. A detailed, nuanced description of giving may also reveal new patterns when studying a specific population, such as LGBT individuals and same-sex couples. Drawing from the detailed information in the joint couple interviews, this chapter is designed to answer the question: "How does the philanthropy of same-sex couples both reflect and differ from general giving patterns at large?"

Beyond knowing exactly what kind of philanthropy gay and lesbian couples participate in, there are deeper questions of how and why they participate that uncover their philanthropic values. Values, beliefs, and psychological benefits are much less explored in the charitable giving literature, although they hold promise for understanding the process of how charitable giving takes place (Bekkers & Wiepking, 2011). Throughout this interview study, participants were asked questions designed to help them reflect on their decisions to give: For example, I asked, “What kinds of things do you consider when making a gift to charity?” and “What has been the most meaningful gift you have made?” These questions encouraged participants to recall what prompted them to give and to link their personal philosophies and values to their gifts. A prominent potential value, hypothesized from the existing literature, was participants’ identifying as lesbian, gay, or bisexual. To address this, the joint interview asked participants to think specifically about how their sexual orientation, as well as any other aspect of their identity, influenced their philanthropic giving. These results are presented in Chapter Six.

This chapter offers an overall description of the study participants’ philanthropic participation, detailed by the types of organizations same-sex couples’ supported, the distribution of their gifts, and the proportion of their giving to LGBT-related organizations. In addition to gifts of money, this chapter also considers volunteering, in-kind giving, support for individuals, and planned giving. Participants’ motivations for giving and the role of identity in philanthropy are covered in Chapter Six. This chapter begins with an overview of how the same-sex couples in this study participated in philanthropy. While the sample is not generalizable, I do highlight significant differences between the study participants and the general population, which could be further explored in a subsequent survey study with a larger sample.

Same-Sex Couples' Philanthropic Participation

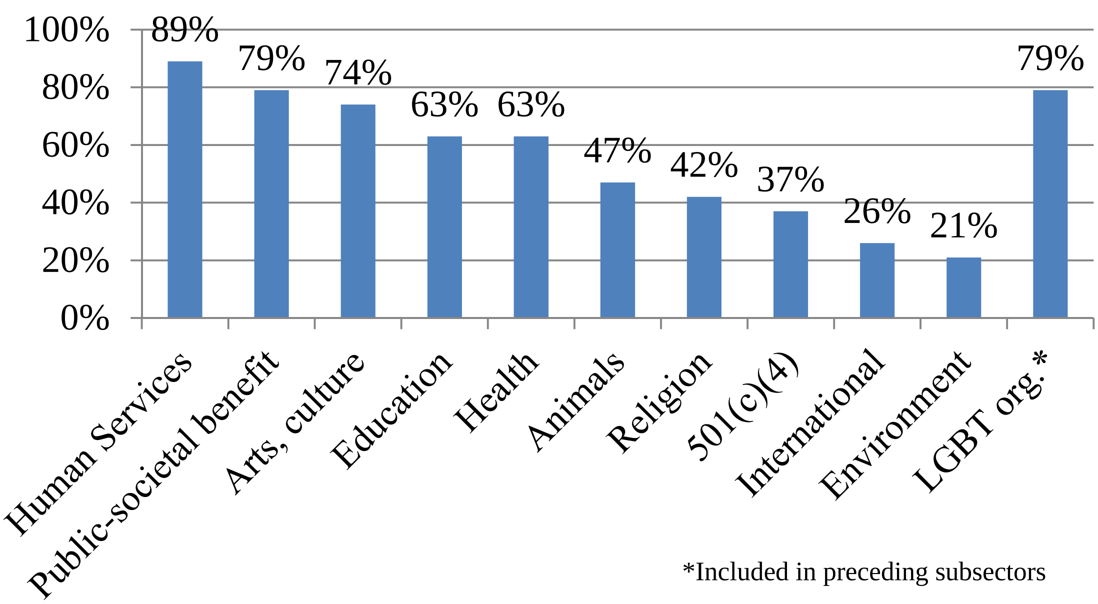
Same-sex couples give to a wide range of philanthropic causes, both through formal organizations and through informal giving, such as directly to people or through web-based "crowdfunding" fundraising. As the literature review in Chapter Two showed, we continue to lack a truly comprehensive study of LGBT individuals' philanthropic giving from a nationally representative sample. Further, most research has surveyed LGBT donors through partnerships with LGBT nonprofit organizations, resulting in an overrepresentation of a more "out" or openly-identified LGBT population, as well as a higher portion of donors and volunteers to LGBT causes. Existing studies also have focused on LGBT donors in large cities and have disproportionately focused on donors on the West Coast, especially in the San Francisco Bay Area (Horizons Foundation, 2008; Rose, 1998). Finally, a significant amount of LGBT giving research has focused exclusively on giving to LGBT organizations, which is a subset of LGBT individuals' total giving (Horizons Foundation, 2008). While this approach is important to understanding the growth and development of the LGBT philanthropic sector, it neglects the full picture of LGBT donors and the myriad causes they support. In response, this study avoided using LGBT organizations to identify donors, took place in the Midwestern United States, and aimed to include participants' total philanthropic participation—from formal organizations to informal giving, and giving to any 501(c)(3) nonprofit, not just those with an LGBT-related mission.

Each interview began with participants describing a recent gift they had made, either as an individual or a couple, and they repeated that process until they had discussed each gift that they recalled making during the previous year. Participants were asked in advance to construct a list of their past year's giving and bring that to the interview, which a majority completed. This served as both a memory prompt and a way for the participants to frame their giving in front of the researcher. While most participants focused their lists on tax-deductible gifts of money and in-kind goods to nonprofit organizations, interview questions also asked about volunteer time, as well as gifts to individuals.

To understand the population of causes participants supported, each interview was coded for the set of nonprofit organizations the couple had supported in the past year. In total, the 19 couples interviewed described supporting 202 philanthropic organizations, many of which overlapped given the geographic focus. Couples gave gifts, on average, to 11 different organizations. The number of organizations each couple supported varied by the couples' genders. Female couples gave to an average of 12.5 organizations, while male couples gave to 9 organizations. From this list, the researcher identified the organizations' National Taxonomy of Exempt Entities (NTEE) codes and categorized the gifts within one of 10 charitable subsectors. The researcher then added a secondary category of "LGBT organization" to highlight that many gifts to LGBT causes could appear in different subsectors, for example an AIDS-service organization would be placed in the health subsector, while a gift to the Human Rights Campaign, an LGBT advocacy organization, would be classified as giving to public-societal benefit organizations.

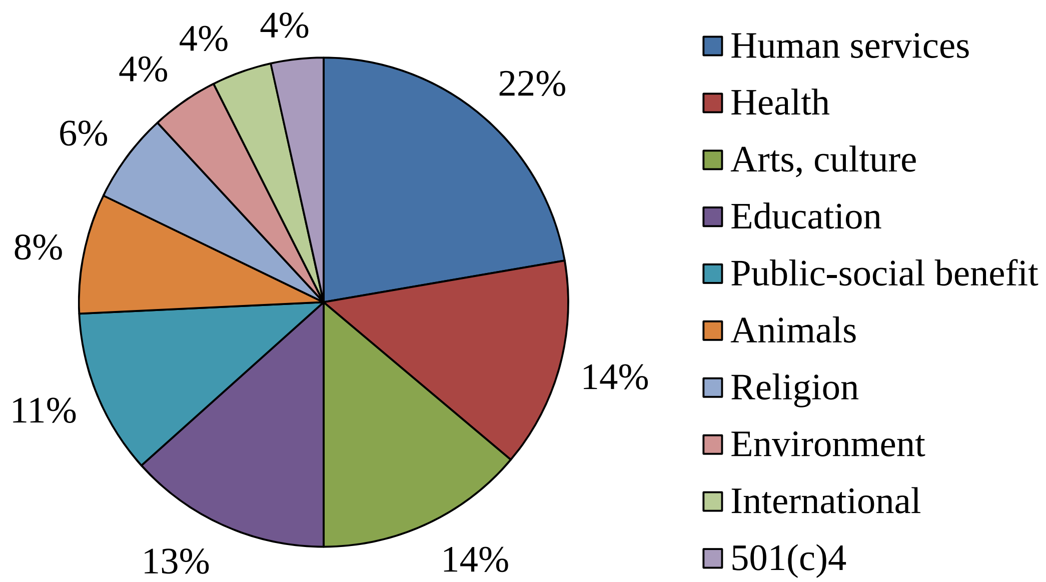
In the first level of analysis, I show the percentage of couples who made at least one monetary gift to an organization in each charitable subsector (Figure 1). One finding of note is that 89% of couples reported giving to a human services organization, which was the subsector with the highest level of participation. Public-societal benefit and arts and culture followed closely with 79% and 74% of couples making at least one gift to an organization in that subsector, respectively. I chose to divide the animals and environment subsector into two categories, as many couples reported supporting animal welfare organizations (47%), far more than is reported in the general population. In line with prior research on LGBT giving, religion received lower support than among the general donor population, with fewer than half of the couples supporting a religious organization (42%) in the past year (Horizons Foundation, 2008). This is not surprising since only 39% of the participants considered themselves religiously affiliated compared to nearly 77% of the general U.S. population (Pew Research Center, 2015).

Figure 1: Percentage of Couples Supporting Each Charitable Subsector



A second step in the analysis was to examine the distribution of giving by subsector (Figure 2). Where Figure 1, above, showed any giving to a subsector by a couple, even if only one gift was made, the distribution of giving reveals subsectors that were more heavily supported. Among the 202 gifts reported, 22% were to human services organizations, 14% to health, 14% to arts and culture, 13% to education, 11% to public-societal benefit, 8% to animals, 6% to religion, 4% to the environment, 4% to international causes, and 4% to 501(c)(4) organizations. Together, these two figures underscore the sustained support to human services, health, arts and culture, and public-societal benefit, as well as the limited support to religious organizations. Again, while this study is not generalizable, patterns of giving among the study participants seem to be consistent with earlier studies of LGBT donors; there is high support for advocacy and civil rights (public-societal benefit), high support for arts and culture and health-related causes, and less support for religious organizations (Horizons Foundation, 2008). According to the Giving USA Foundation (2015), nationally, congregations and religious organizations receive nearly one-third (32%) of all charitable contributions, followed by educational organizations (15.2%), and then human service organizations (11.7%), showing a different pattern from the giving of same-sex couples in this study. Nationally, only 7.5% of gifts are directed to public-societal benefit and 4.1% to arts and culture (Giving USA Foundation, 2015).

Figure 2: Distribution of Giving by Charitable Subsector (Number of Gifts)



Giving to LGBT Organizations

Finally, while not traditionally tracked as a distinct subsector of nonprofit organizations, 79% of same-sex couples reported making a gift to an LGBT-affiliated organization in the past year (Figure 1). Among the 202 gift that participants reported giving, 30 gifts or 15% were directed to an LGBT-affiliated organization. These included large national legal and advocacy organizations like the Human Rights Campaign and Lambda Legal, a state-wide 501(c)(4) that advocated for marriage equality, a local LGBT youth organization, a local AIDS-services organization, and a newly established transgender organization. Compared to the Horizons Foundation (2008) study, interview participants in this study had a higher tendency to support a local or national LGBT organization; however, like previous research, the majority of participants' giving was directed to non-LGBT organizations. Previous studies have found anywhere from 50% to more than 75% of LGBT individuals' formal philanthropy is directed to non-LGBT organizations (Badgett and Cunningham, 1998; Rose, 1998).

Among this sample, that percentage could be even higher; although this study did not account for the proportional dollar value of gifts, 85% of the 202 gifts that study participants made were to organizations that did not have an LGBT-related mission.

The Value of Donor Gifts

Participants reported a wide range of dollar amounts in their giving, from high-level, annual leadership gifts of $10,000 to $25,000, to annual sustaining gifts of $1,000 to $2,500, to regular annual support of anywhere from $25 to $150. While couples' total giving amounts were not analyzed as closely, participant couples gave anywhere from a couple hundred dollars a year to as much as $50,000 annually. Only a few donors reported having made large, multi-year commitments to an organization's capital campaign as part of their philanthropy.

Given the wide scope of donors' charitable contributions, I asked what participants considered a large and small gift. Small gift amounts coalesced around the range of $10 to $500, with lower overall donors reporting $10 to $25 as a small gift and larger annual donors ranging from less than $100 to $500. Large gifts on the other hand, had a much greater range. Most participants reported a large gift as being a minimum of either $500 or $1,000. For individuals with lower annual giving and less financial capacity, this figure was lower; usually $100. However, for individuals who had been accustomed to making large annual gifts, a large gift could be as much as $2,500 to $25,000. Some donors also identified a middle range of giving, typically gifts in amounts between $100 and $1,000. Heather responded to this question with some of her decision-making process: "[A large gift would be] $500 or more. For me, that would be a large amount of money. I would have to budget or save to come up with that at once. Or take it out of my savings." "And then a small gift?" I asked. "Fifty to $100 because that's an amount you don't have to think twice about. You can probably spend it somewhere else…it's a dinner out, but I don't have to actively plan for that amount of money." Donors' philanthropic commitments often reflected this characterization quite well. For example, donors usually began their interview talking about their largest gift in the past year and only briefly mentioned smaller gifts, many of which were given at the request of friends and family for their fundraising campaigns, walks, and other events to organizations the donor knew less well.

In addition to making monetary gifts to 501(c)(3) nonprofit organizations, same-sex couples participated in a wide-range of other kinds of philanthropy, including in-kind giving, volunteering, making gifts to individuals (including both family members and friends as well as strangers), and considering long-range or planned giving that would take place through their estate. These different expressions of philanthropy were mentioned by the participants themselves upon reflecting on the open-ended interview questions. Couples also reported two kinds of monetary giving impacted by their employer: working for a nonprofit organization that they also supported as a donor, or having their for-profit employer match their charitable gifts to increase the amount of support they were able to direct to nonprofit organizations. These types of philanthropic participation will each be discussed in turn, using participants' own words.

Giving Away Goods

In addition to monetary gifts, giving away food, clothes, household goods, and furniture was a common practice among the couples interviewed. At least 13 of the 19 couples discussed making donations of material items during the past year, often accounting for a value of several hundred to even a thousand dollars or more, although only some couples took time to track the value of these in-kind gifts. As Kathy explained, “I’m big on, if I have stuff that I’m going to be done with, then I try to give it to somebody or an organization that can benefit, whether it’s our clothes, an old piece of exercise equipment, TVs, anything like that.” Participants usually directed these gifts to Goodwill, veterans’ organizations like AMVETS, homeless and domestic violence shelters, local libraries, and food pantries. For Brenna and Jackie, the desire to give away items was motivated by wanting to see things be used again. “I think we both feel pretty strongly—and this is something we’ll do more together, although [Brenna] really takes the lead on that—is realizing that we have a lot of stuff but wanting to make sure it doesn’t end up in an incinerator or a landfill, making sure that stuff that can be repurposed is repurposed.” Sometimes organizations were chosen for their convenience of donation drop-offs and some even picked up items from donors’ homes; however other giving was more strategic. Donna and Carol chose their organizations carefully: “There’s a mindfulness about what’s it going to—and not just getting rid of crap, but making sure that the organizations that we give to at any given level are going to be good, well-run, and serve—and have clarity of mission.” This motivation of organizational effectiveness will be explored in more detail in Chapter Six.

Three instances of in-kind giving stood out as examples beyond giving away items that were no longer needed. Ryan and Victor donated clothes and other items to a women’s jail and an orphanage in Peru, the country where Victor was born and raised. At least once a year, they send a 40-pound bag of clothes to a jail where women are able to have their young children live with them, and when they travel back to Peru to visit family, they bring an extra suitcase of items to give to the orphanage. Steven and Chris, who had the lowest household income of all couples included in the study, found a tremendous amount of meaning in their in-kind giving. As they tended to shop at Goodwill for things they needed, Steven started purchasing sports equipment, such as basketballs and soccer balls, to give to the local Boys & Girls Club as well as books and toys to donate to their son's nonprofit preschool. Steven said,

> Those kids were ecstatic to get basketballs, and they were not the newest basketballs, and I had even forgotten to pump them up, even though I had planned to. But those were—one kid goes, "Oh, man, you know we needed these." And he wasn't even talking to me, but […] that to me is a lot more meaningful than [giving money to] an organization.

Finally, Robert and Henry made regular, significant gifts of artwork from their personal collection to arts organizations Henry had worked for during his career. Henry identified this as something particularly meaningful for him as well, saying, "Mine would be giving art to a place that I think really would appreciate it or does appreciate it. [My most meaningful gift] is the objects more than the money."

Giving Directly to Individuals

According to Independent Sector (2001), informal giving is defined as "contributions given to individuals such as relatives who did not live with the respondent and to friends, neighbors, or strangers" (p. 36). While infrequently studied as compared to formal giving, in 2000, nearly 52% of households made informal contributions with 40.8% of households giving to relatives, while just 26.2% gave to friends, neighbors, or strangers; 15.4% of respondents gave to both categories (Independent Sector, 2001). Independent Sector (2001) also found that households that made informal contributions had a slightly higher household income compared to the income of all households. Their finding on household income is in contrast to what this study found; knowing which finding better reflects actual giving patterns is difficult to assess, as informal giving questions are infrequently asked. Research on giving among minority populations, including African American, Asian American and Hispanic people, reveal that informal giving, particularly to family members, is a large and significant part of these communities' philanthropy (Wang, 2011).

More than half the couples in the study (12 of 19) reported that they sometimes make gifts directly to individuals, bypassing a nonprofit organization. These gifts could include assisting panhandlers; giving significant gifts to friends, family, or neighbors; or supporting individual fundraising causes, such as defraying someone's medical bills or supporting a favorite musician through crowdfunding websites like GoFundMe. While this was not a large part of most couples' philanthropy, many of the couples who gave in this way said it was something they did a few times per year. Even though this kind of giving is not tax-deductible, it is certainly included in the broader definition of philanthropy and was identified as such by the participants themselves.

Both Patrick and Brenna discussed supporting panhandlers or people they encountered going to and from work who they perceived as homeless. Patrick's giving ranged from spare change, to a couple of dollars, to granola bars that were in his bag. He says,

> I work in a downtown area, so there are often times I find myself trying to help out the downtown homeless population. […] If I ever have extra change or money on me, I want to be able to give that to folks that I pass on the street. […] And what they do with it is, obviously, what they're gonna do with it. But I try to do that when I'm walking downtown and seeing folks who need some kind of assistance.

Brenna, who drives by a homeless camp regularly, engages in a similar practice: "When I go home on 10th Street, there are people begging. They live under the bridge

[…] so I've taken them things before, some money and food and drinks. I just set them there by the bridge, and they pick them up. You can't ignore those people." Chris and Steven also participated in this kind of giving with Chris saying, "I tend to prefer to just give to people. I mean, I'm more likely to give to a panhandler than I am to write a check to an organization. I guess I see more of an immediate need." While this kind of philanthropy often goes unaccounted for in traditional studies, it is clearly motivated by seeing a need, recognizing people's humanity, and feeling as if personal gifts will be of assistance.

Another type of giving to individuals was through fundraising websites like GoFundMe, where individuals, families or other small groups can collect donations to defray medical expenses, support someone through a personal disaster, or even fund a creative enterprise, such as a musician who wanted to self-finance an album. This was a somewhat frequent practice for Jessie, who gave $10 to $50 at a time to causes suggested to her by friends and family, including building a wheelchair ramp for someone's uncle and supporting a student taught by one of her friends. One interesting observation about the participants who gave to panhandlers and funded personal campaigns was that it appeared predominantly among couples who were lower-level donors to formal organizations or had lower household incomes, which was in contrast to Independent Sector's research. More research would be needed to understand if this was a generalizable trend that is changing and whether this practice is more or less frequent among people who identify as LGBT as compared to the general population.

Finally, several couples reported giving significant support to family members and friends. This could include supporting nieces' and nephews' school fundraisers or contributing to their college funds or helping adult children and close friends through difficult periods of their lives. Ryan and Victor had recently helped their nephew pay for his 8th grade trip to Washington, D.C. John and Tony, who did not have children, paid for their nieces' and nephews' college textbooks, which amounted to supporting two or three family members each year. John, who also worked in a higher education institution, occasionally personally helped students in his program afford necessary things like GRE exam fees, a conference attendance, or a computer repair. John says, "I call it removing the barriers that can really help with someone's lifetime projection with regard to education. […] The students always [say], thank you so much, thank you. All I ask them is, 'You pay it forward when you get the chance.' That's the only thing I want from them." Most of these gifts were a few hundred dollars at a time, and the donors expressed they felt that giving the money to the person was for a larger, long-term benefit.

Similarly, several participants reported giving personal gifts to friends and family who were experiencing financial hardship. Ryan and Victor had made "loans" to some of Ryan's siblings, up to $5,000 at a time, which they never asked them to pay back. William currently sends his adult daughter a $1,000 check each month because her husband has been out of work. He said, "I've always been kind of a doting father, and it's been important to me. My daughter is in straits right now where she needs some help, they need some help. I'm happy to do that." One of the most important gifts Beth and Melissa made was to help their friend and fellow church member, Ashley, who was unemployed, fix her furnace. They were frustrated that their church had not stepped in to help her, so they decided to redirect their regular church contribution and repair her furnace with a gift of $1,500, which they took out of their savings account. Reflecting on that gift, Beth said the following:

> I mean at the core of it, right, people matter. So I think it's why we got so frustrated with the congregational church and decided, "Well, we're just going to fix Ashley's furnace." And that felt so much more important than doing some sort of scheduled tithe. It's something like that to see people's needs and be able to contribute something that really is meaningful to them whether that's in stuff for their kids or just kind of the necessity of heat or food.

Including participants' gifts of more informal philanthropy, whether to people they were related to, were acquainted with, or who they simply passed on the street, provides a much more well-rounded picture of couples' giving and the overall generosity among study participants.

Giving of One's Time

Almost two-thirds of the study participants reported volunteering in some capacity during the past year. Twelve study participants served as nonprofit board members in leadership roles. As Tony said about his giving, "I think there are three tenets—time, treasure, and talent. And […] the amount of time that we give to organizations and that to me is significant too. We try to do all three, maybe at lower levels, but maybe we're middle of the road for everything." While the conception of time, talent, and treasure is most associated with board service, which is also discussed later, as it often relates to one's motivations for giving, here I detail participants' sustained and occasional volunteer involvement with nonprofit organizations as another form of their philanthropy. Eleven participants had engaged in sustained volunteerism over the past year outside of board service, either volunteering consecutively on a project over a period of several months or serving a weekly or monthly commitment. Some of these participants also added occasional, one-off volunteer projects to their more regular commitments. Another five participants engaged in occasional volunteerism, participating in one or more short-term or single-day projects in the past year, some on their own and others through their employers. In total, approximately 63% of the sample had engaged in some form of volunteer activity in the past year compared to 25.3% of U.S. adults nationally in 2014 (McKeever, 2015).

Much like aspects of the in-kind giving described above, some participants found tremendous personal meaning and value in contributing their time. Evelyn, who pursued photography as a hobby, enjoyed donating her services at one or two fundraising events per year, including an annual stair climb for the American Lung Association. She said, "I'd take my equipment, and it felt really good to use equipment that, for the most part, I have been using for my own pleasure and hobby, to use that and have that appreciated and feel like I was giving something there to that organization, and those people, that made the event special to them because a lot of them were running in honor, in memory of someone." Similarly, Jessie served on a local sustainability committee and said, "The [task force] has been meaningful because it's something I'm passionate about. I feel that we can make a difference. It gets me going." Giving of one's time was a way to contribute in a personal and hands-on way to the causes participants' cared about most.

Paul and Jerry, two of the study participants in their late 50s had significant volunteer histories both as board members and more general volunteers. Paul, who is HIV-positive, volunteered in the food pantry of a local AIDS-services organization one day each week and packaged groceries, even though he was now blind. He had originally set up the food pantry when he served on the organization's board and continued to enjoy being a part of the organization. Historically, he had also volunteered to speak to families and individuals who were recently affected by HIV and support them through their diagnosis. In recognition of his efforts, his husband told me, Paul had even been named Volunteer of the Year. "It was a very nice recognition," Paul said modestly. In contrast, Paul's husband, Jerry, was a runner who had been volunteering for several years with an organization that encourages homeless individuals to pursue running. He ran with the group two or three days per week and had helped new runners complete long races at the same time they were finding jobs and securing housing. "I love it!" Jerry said. "It's the best volunteer thing I have ever done in my life. You can just see how it's improving people's lives, and I like the people. It's just really rewarding." He shared the story of one client who he decided to run a half marathon with.

> I said, "I'll pace you for this mini." He ended up running at seven minutes faster than he ever dreamed, and to this day—that was probably two years ago—he goes that was the best race he ever had, and it was kind of for me, too, even though I didn't go anywhere near my best pace.

Ricardo had a similarly impactful volunteer experience that he recalled from more than 20 years ago when he served as a "buddy" to an HIV-positive individual, taking him to appointments and providing friendship. "I moved here in [19]94, and I did that about three years actually. The unfortunate thing of that is that people were actually dying of AIDS a lot more than they are today. The first one they assigned to me died in two months, so you talk about—wow."

Several participants were involved in volunteer activities through their employers or used their professional expertise in volunteer roles. Tina had volunteered for six-months to lead a process improvement project at the local humane society, since she had received specialized Six Sigma training on process improvement through her employer; her wife, Cheryl, had volunteered as a new attorney for a legal aid organization for more than a year providing pro-bono legal work until she was hired on part time. Another attorney, Heather, took on one to two guardian ad litem cases per year, where she represented abused children, a commitment of 80 to 100 hours of time per case, much of which she tried to complete outside of her normal working hours. Robert supported his husband's role as an arts executive and volunteered a number of hours on event and committee work related to the institution. And Steven, a social worker, volunteered as youth mentor at the local LGBT youth center.

Two instances of less formal volunteering also stood out. While Donna's wife, Carol, was retired and engaged in formal volunteering, Donna, a fundraiser, considered herself an informal mentor to young professionals and people who were raising money for other causes.

> I have tended to not do so much in a scheduled volunteer way. To me, it's very life-affirming to mentor and have conversations with people that have questions. I frequently find myself talking with–as soon as people know you're a fundraiser, either it kills the conversation completely and people run from you, or they're like, "Oh, I'm on a small board with this organization. What do you know about it?"

In perhaps a newer form of volunteerism, Jackie viewed her social media presence as a form of philanthropy, particularly as she advocated for racial justice and economic equality, even though she debated if she should call it giving as compared to more formal volunteer work. However, it was a way for her to "contribute" while feeling financially constrained. As Jackie stated,

> It's barely even giving time, but I think a lot of people now think about their social networks as a way to share information, to prompt others to give either time or finances. And so I've done more promoting on that front than real giving or time. It can be anything as easy as just sharing various stories or links either on Facebook, Twitter, other networks. I feel like a lot of people now think that's how they're giving their—they're giving their time by promoting a cause through their networks.

As participants' experiences show, volunteerism can come in many forms and may or may not be related to the organizations and causes people also support financially.

Planned and Future Giving

Asking about couples' planned or long-term giving was not part of the original interview protocol; however both participants and the researcher brought it up in many conversations, and it became a frequent follow-up question as the study interviews progressed. As participants' average age was 47.5 years old, many couples had not yet taken the steps to make estate-type gifts; however, couples frequently indicated that they were thinking about planned giving as something they wanted to do in the future. The following quotes represent how couples were thinking about their future estate giving:

> I've thought about it, but it's something we have not discussed at great length because we're still in the sense that, yes, we would like to continue giving to the organizations that we feel strongly about. (Ricardo)

> I would definitely make a donation. I hope to have some money then. I have not written any of that into a will, nor do I actually have one because I don't have any money, but I would definitely not just like to pass it along to my niece and nephew, but do better and have money do some good. (Brenna)

> At some point, my guess is we'll have planned giving conversations with our institutions, because they matter, and what we think about theological education is changing. And the institutions that provide that kind of an education can't sustain themselves. So thinking about what planned giving will do for them, and which institutions are doing something really unique and worth investing in, is something, I think, as we get older, that will come up. (Melissa)

While many couples discussed future intentions around estate giving, six couples (31.6%) shared that they had already executed wills or made beneficiary designations in their retirement plans that included gifts to nonprofit organizations. This is much higher than national averages of charitable estate giving, which vary from 2% to 4% among non-donors and non-volunteers to as many as 17% of individuals who both donate and volunteer as reported in one academic study (James, 2013). Jerry and Paul, who were long-time members of a Lutheran church, were one couple to have made charitable gifts in their current wills. Jerry said, "The bulk of [my estate] will be going to the church because we have no kids, and my nieces and nephews are going to be fine." Another participant, Carl, had designated five $10,000 gifts in his will to different organizations. Peter, who was only 37 but worked as a nonprofit fundraiser, had designated his insurance plan to "lots of charities." His partner, Jeff, reinforced their commitment saying, "When we both expire, I'm sure we'll take care of nieces and nephews a little bit, but I suspect at least half of our assets will go to philanthropy. *At least half*" (his emphasis). Overall, the study sample generally exhibited higher than average philanthropic behavior, and planned and future giving was no exception.

Some couples, in discussing their intentions to make planned gifts in the future, highlighted the tremendous opportunity they felt nonprofit organizations have to secure gifts from same-sex couples, especially those without children. John said, "I think we're still in the discussion stages with our financial advisor. I think for any charitable organization and they're dealing with gay couples, if they don't talk about planned giving, they're crazy, because most of us don't have children, and to me that's huge potential, huge potential." Similarly, Henry and Robert discussed reaching out to the LGBT community as an untapped resource for philanthropy, including for the organization Henry led.

> We had slight internal conversations […] about how do we actually really harness the power of this generation of gay and lesbian couples, like myself. I do have a daughter, but nevertheless, there's a lot of couples who just statistically look like just prime donor candidates for bequests and often have decent incomes and could leave the money to an

> organization if they so wanted to. And yet I think we've been quite shy about trying to figure out a strategy.

He continued by saying the opportunity for fundraisers to conduct sustained outreach to the LGBT community may be limited, as same-sex marriage is now legal—meaning fewer couples will need to proactively develop estate plans to ensure protections for a surviving partner—and more couples might have children who can inherit their estates.

> Because my guess is, statistically, as we can all get married and adopt kids or have kids, we're all just going to become so statistically average, and our money's going to go to colleges and our money's going to go healthcare and all that kind of stuff. So there's this generation of people who are really happy that they can now get married, but at age 55 they're not going to go have kids.

Henry's thoughts about the impact that legal same-sex marriage may have on LGBT couples' estate planning will be interesting to study over time.

Increasing One's Contributions through Employer Matching Gifts

Four participants worked for employers who matched their employees' charitable gifts to qualified nonprofit organizations. For some employees, this was a strategy to maximize their philanthropy, and they diligently tracked their giving in order to take advantage of the match, which ranged from overall contribution limits of $10,000 to $50,000 per employee, depending on the employer. One participant shared that she kept an annual list of her giving on an Excel spreadsheet, which included a column that read, "Did I match it or not," in order to track and maximize her employer match. For one gift in particular, Karen contributed $7,500 to a substance abuse recovery organization and was able to have her employer match it dollar-for-dollar for a total gift of $15,000. She said, "When [that gift] landed on their doorstep, it felt it was going to make a difference in the face of a disease that no one in my family could make a difference. Being able to donate in a way that my money doubled and was an organization that was going to have an impact—that was the biggest, most important of my donations."

Supporting One's Own Nonprofit Employer

While some participants worked for large, for-profit employers who encouraged their employees' giving through matching their charitable gifts, a significant portion (44.7%) of the study participants were employed in the nonprofit sector. The nonprofit workforce is growing in the United States, with recent estimates indicating that nearly 10.3% of the working population is employed by a nonprofit organization (Bureau of Labor Statistics, 2014). This includes educational institutions, hospitals, social service organizations, arts and culture nonprofits, and many others. In this study, 17 of the 38 participants were employed by nonprofit organizations, significantly higher than the national average.

While not necessarily a limitation to this study, this characteristic may have resulted in participants' having a heightened awareness about philanthropy as employees in the sector who often had some first-hand exposure to the impact donors' gifts had on their organizations. As Martha, a social worker, says:

> I feel really strong about where I work and the services that they provide, so I will probably always, even when I don't work there, donate to them because I think they do a good job. And I guess I figure if people would give, maybe we'll get a raise. (Laughter). I feel that way. It may come back and be good benefit for us.

Similarly, Victor and Ryan described how they made the decision to support the hospital where Victor was a physician.

> Victor: So every year we give $1,000 to the [hospital] foundation, and we've been doing that for the last eight years. We get to choose where that money goes, and that goes to the critical care unit for patients who need extra help.

> Ryan: That was just briefly brought up to you when you found out at work that that was something that was very common among his co-workers. It was kind of a two-minute conversation.

Finally, Ruth, who had worked in several nonprofits and now worked for a public university, shared how her awareness of the need for philanthropy was heightened through both her educational experience and internships.

> Probably the most significant change for me came when I went through and got my Masters in Professional Accountancy and started taking classes in nonprofit management […] and just became aware of how much some organizations depend on fundraising. That it raised a level of awareness that I didn't have before, and that's made me a more—I don't just throw away a solicitation letter when it comes; I think, well I'll look at this. I'll continue to give to these particular organizations because they need the money.

Another portion of the nonprofit employees in this study worked specifically in fund development or were in their organizations' leadership with job responsibilities that included fundraising. For these participants, there was added knowledge about philanthropy as something they participated in on a daily basis, as well as an either implied or explicit expectation that they would support the organization they worked for. As one couple, Jeff and Peter, who both worked in the nonprofit sector, explained:

> Jeff: I've worked [at the arts organization] for 11 years, and it's just a way of life for us. We support them financially as well.
>
> Peter: I think it's important to support the institution that I'm raising money for […] and I contribute around $500 a year. And I'll—we'll be making a capital—we're in the middle of a capital campaign, and I'll be making a campaign contribution at some point, but we don't know what that is yet.

Other nonprofit executives expressed similar views about supporting their organizations and explained that they needed to exemplify the giving they expected of their board members and lead donors.

> Being a development officer, there's the opportunity, and I feel responsibility, to give at the level that's being requested of whatever the significant donors, generally board members for the kinds of organizations I've worked for, so that I can make requests for gifts at a specific level, as an employee giving at that level. […] I don't think it's right to ask people when you're not giving and when you're not giving at a substantial level. (Donna)

Henry, an arts executive, shared that the organization he is working for receives the couple's largest philanthropic gift each year, and that this amount has grown significantly at his current institution.

> Since we've been together, we've always tried to be generous to the institution that I'm working for as well as other institutions we're interested in, including ones that Robert's on the board of. But by far, in our whole history of being together, our gifts to [my current organization] have been our largest. […] So one of the things I noticed when I arrived was that we had very few donors giving $25,000 or above to the [organization] annually, including some of our most powerful board members. And so we decided as a couple that we would give at the $25,000 level to begin with. Both because we wanted to do that but also as a way, in my specific case, to be somewhat symbolic to the board, which is, "I'm willing to give at the level; would some of you step up and give at that level?" and to some degree that's actually been successful that that number of people has been growing.

Conclusion

Philanthropic behavior can be expressed in numerous ways, from formal, monetary giving to nonprofit organizations to volunteering in one's community. While few studies attempt to capture the full range of individuals' giving, this study examined same-sex couples' giving from a variety of perspectives in order to understand both the range of philanthropic behaviors among LGB individuals and to explore potential patterns that were either similar to or different from the general American population. As the findings show, the gay and lesbian couples in this study were highly philanthropic, especially when compared to overall national averages of giving and volunteering. Participants were more likely to support human services, health, the arts, and public-societal benefit organizations, and a majority of couples made at least one gift in the past year to an organization with an LGBT mission. Participants' philanthropy was diverse and multi-faceted and often took multiple forms. Most participants annually gave away goods in addition to money, made gifts directly to individuals and also volunteered their time, including serving on nonprofit boards. Despite the sample's average age of 47.5 years old, six couples had already made charitable estate gifts. Several participants also increased their giving through their employers' matching gift programs, and many were employed in the nonprofit sector and often supported their employer organizations.

While some of these findings may have been due to the large number of participants employed by the nonprofit sector, self-selection into this study may have also played a role. Although a qualitative study such as this is not generalizable, and definitive conclusions cannot be drawn about how same-sex couples may in fact practice philanthropy differently from their different-sex counterparts, all participants in the study had rich experiences with philanthropy, which yielded detailed information about their motivations and values. These findings are detailed in Chapter Six under the themes of identity and motivations for giving.

CHAPTER FIVE
HOUSEHOLD FINANCIAL ARRANGEMENTS AND CHARITABLE DECISION-MAKING

Like any partnered couples, same-sex couples who are married or in committed relationships and who share the same residence must negotiate how to manage their household finances, including deciding whether or not to merge their finances. To date, little charitable giving research has asked married and partnered households—either same-sex or different-sex—about how they manage their money; yet money management may be an important factor in understanding how a household makes charitable gift decisions. Most charitable giving research has implicitly assumed that all coupled households are heterosexual; giving research also has not asked couples how household money is managed, thus making the assumption that households make charitable gifts from one shared account. Instead of operating under these assumptions, researching both household financial arrangements as well as charitable decision-making illuminates where giving comes from and the role each individual within the household can play in determining where and how gifts are made.

This chapter examines how same-sex couples manage their household finances and make charitable giving decisions. The chapter begins with a discussion of household financial management and the similarities and differences between the same-sex couples in the study and financial management among the general population of U.S. coupled households. Next, the findings on financial management are linked with how same-sex couples make charitable gift decisions, including how they talk about giving with each other. Then, the chapter examines how couples choose to be recognized for their philanthropy and how recognition may relate not only to being a donor, but also to being part of a minority identity community. The chapter concludes with the results of the giving decision each couple made at the conclusion of their interview.

Household Financial Management

As described in Chapter Two, research on systems of domestic money management has focused on households operating as a single economic unit (with the sub-categories of the whole-wage, housekeeping allowance, or joint-pooling systems) or as two separate economic units (independent management), with the vast majority of households operating as one of the single unit types (Pahl, 1995). However, existing research has also found that same-sex couples tend to use different financial management systems than different-sex couples and practice individual financial control (Burns et al., 2008). A third system of money management, the partial pooling system, which blends joint-pooling and independent management systems, has also appeared in the literature in recent years (Burgoyne, Clarke, Reibstein, & Edmunds, 2006; Burgoyne et al., 2007; Pahl, 1995). In this system, each member of the couple can contribute either an equal amount or a proportional amount of their income into a joint account, while retaining individual control of the rest of their funds. While studies show that at least half of different-sex couples still jointly pool their money, these patterns are in flux as younger and newly married different-sex couples are choosing to retain more individual control over some or all of their incomes (Burgoyne et al., 2006). In contrast, several studies have shown that independent management and partial pooling systems are much more prevalent among same-sex couples, both historically and more recently (Blumstein & Schwartz, 1985; Burns et al., 2008).

The current study of 19 same-sex couples confirms these prior research findings among a purposeful sample of same-sex couples in the Midwestern United States who also participate in charitable giving. In this study, nine couples were classified as practicing independent control over finances, five practiced partial pooling, and five couples had jointly combined all finances and income into a shared account. One caveat to these results is that nearly all participants in the study earned some income, being employed full or part-time or receiving retirement or disability benefits; only two individuals reported earning no income in the prior calendar year. Broadly speaking, the same-sex couples who had jointly combined their finances tended to have larger disparities between each person's individual income (either in actual dollars or symbolic effect) or had a primary income earner. This included a stay-at-home dad and his physician husband, a couple where one person had returned to graduate school while the other worked full-time, a recent retiree and her spouse, and two individuals who self-identified as underemployed relative to their levels of education. Interestingly, as couples described their financial management systems in the interviews, it often seemed that they had made their decision to combine finances together before experiencing the life changes that supported joint arrangements, such as retiring or having children.

In Table 3 on the following page, I present examples of interview data to briefly characterize each of the three types of financial management structures. At times, understanding a household's financial structure took several follow-up questions, as participants' views about money ownership and their actual practice of money management sometimes varied. This is explained in more detail below.

Table 3: Financial Management Practices among Study Participants

Financial Structure	**Number of Couples**	**Excerpt**
Joint management	5	We have one bank account. One joint account. Any significant decision, like if it's above a couple hundred dollars, we're talking to each other about it. There are really not a lot of things we don't talk about. […] It doesn't matter what source it came from because I'm working full-time, and Carol is retired. There's not a lot of, "This is mine, this is yours," "What's my allowance?" or "How'd you go do that?" It's just very equitable. (Donna)
Partial pooling	5	We have a home account and then two separate individual accounts. (Paul) Everything is automatic deposit and has been for all this time, so we both put the exact same amount in this joint [account], and then our others just have what's left over, which is way more than what goes in the joint. (Jerry)
Independent management	9	He has his own checking account. I have my own checking account, although his name is on mine. He contributes towards household monthly expenses, and then I pay most of them. He has a few that he takes on like cable and whatnot, but I think because most of the money is in my account that it then just kind of falls to me to say, "Well, here's what are we going do this month." (Kevin)

In evaluating how same-sex couples in this study manage their money, it is also important to highlight what was absent in financial practices: among this sample, no couple practiced a whole-wage system, where one person hands over income for the other person to manage, or an allowance system where one person has to ask the other for money. In other words, couples practiced financial arrangements that largely increased financial equity (as in the joint-management couples with larger income disparities who pooled all their resources together), preserved independence in managing one's own money and making financial decisions, or contributed in either an equal or proportional way to the "common money"[3] or joint account in partial pooling structures.

Couples also reflected a range of intentionality to their money management systems, but few, if any couples, had altered their systems over time, including couples who had recently legally married and were now filing joint federal and state income tax returns. In terms of intentionality, while some couples expressed making clear financial planning decisions at the outset of their relationships, others seemed to fall into patterns early on in their relationships that had not changed drastically over time, even though they had now been together five, 10 or even 20 years, and experienced major life changes, such as having children, changing jobs, or experiencing significant health challenges.

While it was fairly easy to classify most couples' financial management practices, the ways in which couples conceptualized money ownership in their relationships sometimes differed from the actual logistics of how money was managed. This was most apparent among the nine couples who practiced independent management but often viewed money in common and/or jointly-held ways. The next section highlights how couples who practiced individual management talked about money in their households and ideas about sharing financial resources.

Even with independent management, money is shared

Interestingly, the financial structure couples practiced did not always align with how couples viewed money ownership. Among couples who practiced independent management, where finances were held in individual accounts, several couples expressed

---

[3] This was a term used by Kathy.

that they viewed their individual money as “shared” or “jointly held,” a contrasting idea to the day-to-day reality. Mark and Ricardo, who had been together for 22 years and maintained independent financial accounts where they were each responsible for a portion of the joint expenses, said:

> Mark: We have separate bills that we pay, but we figure it’s all coming out of the same collected pot at the end. Is that fair, honey?
>
> Ricardo: I think it is, yeah. I think it’s because before we did that for so many years. When I first moved here, you bought the house, so you were paying the expenses of the house. Then I decided I’ll just pick up the daily this and that. So really, we never sat down and said, “Okay, let’s go 50-50” or anything of the sort. We never have actually done that.

Mark and Ricardo were an example of a couple who started using an independent management system in the beginning of their relationship and had not altered it over time, but, as their relationship grew and lengthened, their ideas about whose money was whose had changed and become more fluid. In many ways, they viewed their financial resources as co-mingled, even though this was not a system they actually practiced. This was also true of another couple, John and Tony, who maintained individual financial accounts but had added each other’s names to their accounts early in their relationship, in a way, making all the money jointly accessible. At first, John described their financial management as joint, then explained they had multiple individual accounts. Yet, at the same time they viewed their money as jointly-held, they each took independent responsibility for paying a portion of the household expenses and proactively respected each other’s privacy to their individual bank accounts.

> John: All of our assets, everything from day one have always been joint, always joint. Although we may view each other as separate accounts, but it’s always been joint. […] Every account has both names on it but I would say that he has his account, I have my account.

> Tony: I think we all have joint accounts, but we view them as—I mean we have ATM cards on every account, but I wouldn't ever think of just going over and taking money out of [John's] account.

Several lesbian couples also practiced independent management but viewed money as a shared resource, including Jackie and Brenna. Jackie offered an explanation for their system of independent management within a long-term, committed partnership as a decision that emerged from their inability to legally marry and thus was dictated less by personal preference than by societal constraint.

> In part, for me, borne out of the fact that for so long we couldn't get married, marriage just wasn't a thing, so there really wasn't a decision to keep things separate. It was just, this is what I'm bringing and this is what you're bringing and we've got our stuff. Even though we merged into one household pretty early on, we've always just maintained it separately, but knowing that there are multiple ways to support each other, I think.

Another couple, Jerry and Paul, a gay couple in their late 50s, recounted advice they had received early in their relationship to keep their money separate in case they were to split up, though they did maintain a household account as well as individual accounts. The absence of legal same-sex marriage until 2014 in Indiana and 2015 nationally is certainly one factor that likely shaped many couples' financial practices, whether they explicitly discussed that or not during their interviews. However, it was interesting that, among couples who had married in the past several years, most had not taken steps to change their financial practices from before marriage was legal, something that might be expected based on Jackie's comment above. Jerry and Paul, who had also recently married, were one of the only couples who considered combining their independent accounts into a single joint account. However, this was largely a result not of becoming legally married, but of Paul's health and progressive loss of vision, which necessitated Jerry writing his checks and keeping track of his account. However, up until the point of Jerry becoming Paul's financial power of attorney, throughout their 28-year relationship, they had each managed their own checking accounts and made separate donations. What stopped them from combining the accounts? They explain:

> Jerry: Probably one of these days, I'll just have a joint account. We really have talked about it. I'm just lazy to not do it because not only is it separate accounts, but we each have savings accounts that go with these, and it's all direct deposit. I have to contact the social security [office]. I have to contact the disability [agency], I have to contact my job.
>
> Paul: And then determine, okay, do we both have X number or percentage of our deposit goes into our savings? Does that stay the same or do we have it combined? At this point, we're lazy.

As Paul and Jerry explain, sometimes it was easier to leave finances as they were than to take the steps to bring money management into alignment with the way a couple viewed their monetary resources. The next section addresses how financial management relates to making charitable giving decisions.

Making Charitable Giving Decisions

One of the contributions of this research is to understand how household financial management may impact a couple's charitable giving. To date, few charitable giving studies have investigated the relevance of household financial structure on giving among either same-sex or different-sex partners. Instead, most research has treated all giving as the household's unitary decision, assuming it reflected both individuals' preferences. As the current study shows, many same-sex couples practice more kinds of independent financial management, which leads to more possibilities for giving. Specifically, when couples choose to practice independent management, the household has at least two financial accounts; in the partial pooling system, the household may have at least three financial accounts. Therefore, there are more accounts from which charitable giving can occur, and couples can make both independent and joint charitable giving decisions. This section examines individual giving as a result of independent management or partial pooling, and then joint giving by joint and partial poolers.

In an independent management system, giving can be initiated and supported by either member of the couple. For example, Mark and Ricardo practiced independent management, and most of their giving was separate and individually funded.

> Interviewer: Do you think of your giving as separate or together as a couple?
>
> Mark: Mostly separate. We have some overlapping interests. And Lambda [Legal], we both contributed to that, but I think Ricardo has organized that. I talk to him about my giving, but it's not really–we're really making separate decisions.
>
> Ricardo: Yes, separate.
>
> Interviewer: With the exception maybe of Lambda.
>
> Mark: Yeah, some of the organizations that we've–I mean, a few of them, yeah.
>
> Interviewer: So, for example, on the Lambda gift, would you put both your names on it?
>
> Ricardo: Yes.
>
> Mark: And I put both our names on the Damien Center and all the United Way stuff. I put his name on it, too, even though it comes out of my paycheck. I just put his name on there.

As Mark described their separate giving, he explained that the majority of his charitable support took place through his workplace's United Way campaign and was deducted via his paycheck. Often, LGB donors in the study who gave to the United Way via their employers did not actively involve their partner in that giving decision and made that decision independently, even when they were giving $1,000, $2,500 or as much as $10,000 a year. In the excerpt above, Mark also described the practice of including Ricardo's name as a donor on his United Way gift even though Ricardo had not financially contributed toward this charitable gift and Mark funded it in full. Multiple participants explained that even though one person might have "paid" for the gift or had it deducted from their paycheck, it was not uncommon to put both individuals' names on it as donors. This finding will be explored later in this chapter and also in Chapter Six.

Among couples who practice partial pooling, there are at least three accounts from which giving can occur: the joint account and each person's independent account. Martha and Kathy described how their giving decisions and conversations varied depending on whether they planned to make a gift from their joint or individual accounts. As Kathy said:

> It still kind of depends on the buckets. (Laughter) […] I don't know that the size [of the gift] would determine us talking about it really. […] I don't know that I could put an amount on it as much as, if she said she was going to give something. I don't know that I would go, 'Well that's a lot.' Cause I would just think that's your money, and that's what you feel compelled to do.

Several couples who practiced this management system explained that most of their charitable giving occurred through their individual accounts, but that when they purchased tickets to galas, fundraising events, or ticket subscriptions to arts programming that they attended together, they paid those from their joint accounts. In this instance, charitable giving was more akin to an "entertainment expense" that both individuals benefitted from, even though they still considered it philanthropy. It was not uncommon for these kinds of donations to be viewed differently from gifts where no tangible benefit was received. As Carl explained what expenses they paid from their joint account, he said, "It's all household expenses. It's the mortgage, it's the groceries, it's going out to dinner, it's all the socializing we do, it's all the tickets we buy for events. Everything like that is funded out of the joint account." While most of what he referred to were household expenses, he included their fundraising gala tickets and other events into their joint entertainment budget.

In both financial management structures where couples had access to independent money, it was common for one member of the couple to have a stronger connection to a particular nonprofit organization they were supporting. In these instances, gifts were often made from the account of the person who had the primary organizational involvement, whether that was as a board member, volunteer, employee, or as a current or former recipient of services. For example, Carl, who worked for a nonprofit arts organization, explained:

> We do maintain separate finances. We talk about decisions, but we do them independently for the most part with the exception of [where I work]. We do plan that one together. Even though it's a household pledge, William writes a check from his account, personal account for his part, and I do my part through payroll deduction. And they know how we're splitting that.

The idea of charitable giving flowing from a particular person in the household was also present among couples who practiced joint management. For example, Tina explained that the reason their household supported Planned Parenthood was because of her partner Cheryl's passion for the organization and its work, not her own.

> I would characterize that our giving is individual of which it comes out of a partnered account. So, said differently, Cheryl gives to Planned Parenthood. I don't have any problem with her giving to that. But if it were just me and not her, that would not be an organization that I would give to. But we do, from a financial standpoint, collectively give to that organization. I'd say our giving is very individualized.

Similarly, Victor described how he started supporting the charitable foundation of the hospital he worked at with an annual gift of $1,000 without much consultation with his spouse, Ryan. Ryan said, "That was just kind of briefly brought up to you when you found out at work that that was something that was very common among his co-workers.

It was kind of a two-minute conversation." Among joint-management couples, sometimes the individual with the stronger affiliation was the one who actually signed the check. As Robert explained, "I write the checks for [the Humane Society]. It's more than [my] interest; it's also a little bit public perception. I'm on the board; it needs to be coming from me. So it's very different."

Perhaps unsurprisingly, couples who practiced joint management described more causes that they supported together, although some gifts continued to be initiated by one person or the other. Joint gifts often included support for a religious institution, such as a church both individuals were members of, memorial gifts, and other organizations where they had shared involvement. Anne and Jessie, who had a joint account, made joint gifts to the art museum and public radio station, but Anne made a more "personal" gift to the organization where she served as a board member, even though the money came from the same account. Melissa and Beth also supported public radio as well as each other's alma maters from their joint, and only, account. In contrast, Jerry and Paul, who practiced partial pooling, only a had few gifts come from their joint account: gifts in memory of friends and family who died, as well as some dinners they attended, compared to the majority of their giving, which came from their individual accounts.

Again, giving jointly and/or independently did not always neatly follow the financial management system a couple used. Ruth and Evelyn, who practiced independent management, had one exception to supporting separate organizations: they made a joint gift to support their church each week. Evelyn explained how they handled making a joint gift with separate accounts.

> My income is a little lower, and so we don't necessarily split it 50-50. […] It's one of those funny things. She'll write the check, but then I'll

> pick up the tab at dinner the next time. (Laughter) Or some equivalent, or pay some other, you know, pay extra on a bill or something. So it's sort of just one person writes the check rather than putting two checks in.

Regardless of how money is managed, at some point, couples are likely to talk about their financial practices including giving decisions with one another. The next section discusses how couples "talked" about their giving and the prevalence of agreement of values over supporting charitable causes, even if the individual organizations they chose to support may have differed.

Agreement about Giving

Prior research has found that giving decisions often reflect how other financial decisions are made in the household, though on a more incidental level (Burgoyne et al., 2005). Regardless of the system of financial management used, in this study, most couples expressed little conflict over making giving decisions, often noting that they had similar values around charitable support and were often in agreement regarding philanthropy. Couples varied in how much they discussed their giving with each other, often with more significant donations—anywhere from $500 to $25,000 depending on the couple—having more extended conversations. Yet even when these larger gift conversations occurred, most couples described them as quite brief.

Martha and Kathy, who had been together for six years and practiced partial pooling, explained that they usually agreed about most financial decisions, including charitable giving. Typically, they had only a brief conversation about making a gift, and it was more for informative than persuasive purposes. As Kathy said:

> We are in pretty much agreement on most decisions. Some things might come out of our common money, and some things might come out of our individual money for no other reason than one of us decides. But it seems like, I don't know that either of us, other than maybe United Way through

> work or something like that, it seems like most of our decisions, we talk about it, not like for approval, but more just to say, "what do you think?"

Similarly, Michael and Kevin were almost always in agreement over giving, even though Kevin paid the majority of the couple's bills and often took the lead in making charitable gifts. They characterized their agreement in terms of the lack of small, petty disagreements, which tended to happen around other topics, but not philanthropic giving.

> Interviewer: Do you ever disagree about who you give to?
>
> Michael: Charitable giving? No, not really that I can think about.
>
> Kevin: Not significantly. I mean, once, I'll grouse, "Oh, I don't want to give $1,350 to the zoo."
>
> Michael: Yeah, yeah.
>
> Kevin: But it's quickly, I mean, we like to bicker, but we don't usually bicker about charitable stuff.
>
> Michael: I mean if I ever comment on it at all, it might be Wheeler Mission, only because I'm not always convinced they use their funds the most effective way.

In addition to agreement, one couple, Jerry and Paul also introduced the idea of trust into their decision making, which had only been amplified after Jerry became Paul's power of attorney after Paul lost his sight. Jerry said, "We agree on everything almost. We actually do. We never had to talk [about it] before, but I write his checks." Paul later responded, "There's an element of trust there, too. I trust him, he trusts me, whatever. If it's an issue, then we'll talk about it. Otherwise, we just go with it." Many of the couples interviewed seemed very comfortable addressing conflict with one another and had reached a point in their relationships where disagreements over finances were minimal.

John and Tony also discussed how they personally knew one another's interests and values and took their support one step farther by respecting and supporting each other's desires to make contributions to different organizations they were affiliated with, including particular designations for programs or special campaigns. For example, John and Tony each contributed to their separate alma maters at significant levels and were both aware of and supportive of each other's decisions, regardless of where the money was coming from.

> John: We know each other's passions, and we respect each other's decisions. So if all of a sudden he said, "Hey, I'd give the full $10,000 for [the University] for this" -- fine.
>
> Tony: Or like when he said, "I want to do this for my professor at [the college]" -- fine.
>
> John: We know each other. I'd be very surprised if he came home and said, "Listen, I gave $2,000 to the zoo."

In contrast to the couples who agreed on nearly all their giving were William and Carl, who had both come out as gay after being married to women and raising children. While they supported several arts organizations as a couple, Carl identified as pro-life, Republican, and Catholic. Although William had converted to Catholicism after meeting Carl and supported the church financially, they each supported separate political and charitable organizations from their own funds that reflected their deeply held views. However, they shared that they had come to a point of respecting each other's values and beliefs and no longer argued about it.

> William: We accept one another's perspective. I mean, I don't go to pro-life events.
>
> Carl: Exactly, right. I went to a pro-life dinner about two months ago, and I didn't invite him because I knew he–
>
> William: And it was not at all uncomfortable.
>
> Carl: I knew he'd be uncomfortable, but it's not like he's upset that I'm going.

> William: Not at all, not at all.
>
> Carl: Not at all. So he understands that's an important part of my past–
>
> William: Well, there was a time that we would–I know we're digressing here. There was a time that we would argue. I mean, not violent. We would argue about capital punishment and abortion. Now, we have a common ground, and I think each of our perspectives has moderated a bit, but there's that core there that we respect one another.
>
> Carl: Yes, I agree. Yes, we respect the difference of opinion and that is not worth arguing about.

As their interview showed, William and Carl had come to an agreement over how to manage their giving, even when they would have not have independently supported each other's preferred organizations.

A second point of conflict over giving was raised by Chris and Steven, not over gifts of money, but around Steven's commitments of volunteer time as they raised a young child while Chris worked full-time and Steven pursued a Ph.D. in social work. Even though they did not have a lot of disposable income for charitable giving, Chris perceived Steven as overly generous with his time, something they were able to joke about as innate to Steven's identity as a social worker. Chris explained:

> There hasn't been any disagreement [about giving], I think primarily because they are fairly low amounts. […] I guess you could say there are some disagreements about the time he spends giving. He has a very, very busy schedule with school. […] And so sometimes there are disagreements about the choice to volunteer for this or that. I work full-time. [Our son] is in daycare most of the day really. There are a couple of hours a day where we get to spend time as a family.

Chris's comment illuminates the issue of balancing charitable commitments among a busy schedule and as a young family.

Kim and Karen, who also practiced individual management, felt that their charitable giving, which was also separate, did not actually feel separate; instead they supported each other's giving, and Karen regularly talked about it with Kim as she considered making various gifts throughout the year. They stated that, while they may have made different choices over which organizations to support, financial disagreements didn't happen around philanthropy, like they might have had with other discretionary spending.

> Kim: Even though it is separate, it doesn't feel separate to me. We've had good reason to do what we've done up to this point, but I don't think that we're so divergent – different – that it will change.

> Karen: If there are disagreements on where we're spending our money or different choices – whether it's around clothing or something else – our differences aren't around philanthropy. You might think that I'm spending too much for a pair of shoes or something.

Anne and Jessie also explained how they mostly agreed on their giving and felt that it was fun to support organizations together as a couple, particularly the ones they were able to enjoy together.

> Anne: I mean the things that we both agree that are, that we're excited about. We definitely feel is more fun in a way. Like I remember, I was super excited when we first got this little thing from the [museum] or whatever. It had both our names on it. It's like, "Hey, we're doing this together as a couple." But I can't say that we've necessarily disagreed on things, although there are probably things that we haven't talked about.

> Jessie: I would think – yeah, I mean we kind of respect each other's decisions. I think in what we appreciate – know that it's not, it might be spontaneous, but it's not frivolous. And it's going to a good cause, and I know that she would be okay with that.

Jessie's final comment illustrates the idea that giving to charitable organizations was a positive and beneficial activity on its own and that even if her partner, Anne, had different interests from her own, that they would support each other in making a gift to "a good cause" regardless of whether the other person would make the gift herself. Ricardo echoed this idea, saying, "We are pretty much into charitable organizations that are doing something good for the social welfare, not only for gay causes, but for health, for children. That has been at least always my focus when I started giving money a long, long time ago. It was children, health, legal, gay issues, of course." This shared support for philanthropy may also influence the next decision on how donors in same-sex couples chose to be recognized for their gifts.

Separate Giving, Shared Recognition

While same-sex couples made charitable giving decisions both separately and together, most couples stressed their shared agreement on larger values around giving and supporting their community philanthropically. At multiple points during the interviews, couples stated that philanthropic giving was not a point of conflict. While this could be attributed to social desirability bias, couples' actions around giving supported this assertion. One example of putting shared values around giving into practice was the use of joint recognition. Regardless of whether the gift was from joint or individual resources, many couples put both of their names on a gift for donor recognition purposes. Engaging in this practice promoted the idea that the gift was made together, came from the couple (instead of the individual), and had the support of both members in the household. Ruth and Evelyn discussed this as a casual practice that sometimes took place when they attended fundraising events individually:

> Evelyn: We come home and announce, "I just gave so-and-so some money" or if we, or at the end of the year when we're getting ready to do taxes, "Oh, yeah, I gave…"
>
> Ruth: We'll yeah, we'll both do that occasionally where we'll say, you know, I put in $25 to blah, blah, blah, and I put your name on it too. "Oh sure, okay!" I mean, we generally, we know each other's values very well.

In addition to making a decision to be recognized together, some couples saw donor recognition as both as a statement of their shared support as well as an opportunity to heighten visibility of the LGBT community as donors to both LGBT-related and non-LGBT nonprofits. Jeff and Peter, who practiced independent management, shared this idea explicitly:

> Jeff: It's nice we have our own things, independent, and we have our things that we do together in terms of our charitable giving in all forms.
>
> Interviewer: But you tend to, again, be recognized for your gifts as a couple?
>
> Jeff: Yeah.
>
> Peter: Because we are – while we are equally important as individuals and recognizable I think in the community, we're just as recognizable as a couple. I think it's important for us to be seen as a couple for a lot of reasons. I mean not only because we give together, but also because we're a gay couple who's making an impact in the community.

In contrast to those who practiced joint recognition most or all of the time, some participants described thinking about their giving in separate categories—giving as part of a couple, versus giving as an individual. Anne identified giving related to her profession as different from the museum and nature experiences she enjoyed with her partner, Jessie. Unlike some gifts where they had both names on them, Anne, who was on the board of a health-related organization, did not recall adding her partner's name to that gift: "I don't know if I ever gave it any thought, but it, maybe it's that I'm not entirely out to all my patients. I just really don't talk about my personal life with my patients. But I don't think I ever really gave it any conscious thought."

As this section illustrates, not only did same-sex couples have a range of financial management practices and gave both together and separately, but their identity as part of minority community was embedded as part of their giving decisions. While individuals varied in the role their sexual orientation played in their giving, in both conscious and unconscious ways, being part of the LGBT community shaped philanthropic practices.

Interview-Based Gift Decisions

At the conclusion of the interview, each couple was offered the opportunity to have a $25 gift made to the nonprofit of their choice in recognition of their time. This presented an opportunity for the researcher to witness the couple make a giving decision, even though it was not using their own money. Most couples made their giving decisions quickly at the end of the interview, rarely naming, let alone discussing, multiple organizations. Usually one member of the couple offered the name of an organization, and the other person readily agreed. Sometimes the individual who decided chose their favorite organization or suggested their partner's. Tina decided to defer the decision to her partner, Cheryl. When I asked if Tina was okay with the organization Cheryl chose, she reminded me of their decision-making process, that any gift under $100 was okay to make without consultation from the other person. Jeff and Peter were the exception and the only couple to have a dialogue around the decision. Jeff suggested that they each start with three ideas and narrow it down from there. They also agreed upfront to eliminate the nonprofit organizations each person worked for. After coming up with their three choices, they had each identified two of the same organizations and had a brief conversation about which organization they should support, ultimately favoring the organization for which they determined the $25 would make a bigger difference. While a few couples used the gift as an opportunity to give to an organization they had not supported in the previous year, the majority of couples gave to an organization they were already supporting as donors.

In terms of where the couples directed their "thank you" gifts, 10 of the 19 gifts were directed to human service organizations, including the local LGBT youth organization, AIDS service organizations, the local food bank, and a children's organization. Three couples directed their gifts to animal welfare organizations; two to educational institutions; and one each to a public-societal benefit organization, health organization, arts organization, and environmental organization. Eight of the 19 gifts supported an organization with an LGBT or AIDS-related mission.

Conclusion

Like their different-sex counterparts, same-sex couples in this study use a variety of financial management systems, although they may be more likely to choose systems that reserve individual control over some or all of one's finances rather than joint pooling. As a result, same-sex couples may have more choices in how to make charitable gifts. Overall, there was strong support for charitable organizations among the study population. While same-sex couples give both individually and as households, this often reflects the type of gift they are making or the affiliations each member of the couple has with a particular organization. Still, even when individuals within a couple wanted to support different organizations, partners respected one another's decisions. As the findings related to recognition show, couples tended to include their partners in donor recognition even when a gift was made from independently-managed resources. These findings are considered further in Chapter Six, which examines the role of identity in philanthropy in greater detail.

CHAPTER SIX
THE ROLE OF IDENTITY AND MOTIVATIONS FOR GIVING

An individual's philanthropy emerges from a complex interaction involving individual motivations, personal experiences, and an awareness of needs, and seeing a gift or voluntary action as a way to respond to those needs. Within that process, the self plays a crucial role. How does who we are influence to whom we give? While research has investigated individuals' propensity toward altruism, belief in the nonprofit sector, and other motivations related to giving, less research has considered the role of an individual's identity in one's philanthropy (Andreoni & Vesterlund, 2001; Bekkers & Wiepking, 2011; Marx, 2000). Individual identity is complex and layered; in addition to gender identity, race/ethnicity, age, sexual orientation, marital status, and other characteristics, individuals can also identify themselves as parents, by their profession or work, by their faith, or by their personal hobbies and passions. These multiple identifiers can also interact in ways that relate to larger societal patterns of power and advantage, resulting in exclusion or subordination, often referred to as intersectionality (Davis, 2008). As this study focused on the philanthropic practices of gay and lesbian couples, sexual orientation was a key identity category of interest, but the researcher also asked participants to discuss other identities that mattered to them and played a role in their philanthropy.

This chapter discusses the role of sexual orientation identity in gay, lesbian and bisexual donors' philanthropy, detailing the ways a marginalized and minority community approaches and participates in philanthropy. I found that regardless of the prominence of the role one's sexual orientation plays in his or her life, identity shapes personal giving in two ways: either as a positive force for supporting causes that align with the donor's identity or as a negative force, providing a litmus test of which organizations donors will not support due to perceived or actual discrimination. Next, based on other identifying categories participants used, I consider how those aspects of the participants' identity shaped their giving. Finally, I examine several of the most common motivations LGB participants reported for making their gifts, whether or not those motivations related directly to their self-identification, as well as four barriers that act as deterrents for giving. While many of the motivations and barriers are common across individual donors—heterosexual and LGB—this study provides a qualitative understanding of how donors interpret and explain their own philanthropic support.

Identity and Philanthropy: The Role of Sexual Orientation

A person's sexual orientation is only one of many characteristics of who someone is, yet it plays at least a minor role in most same-sex couples' philanthropy, and a larger role for a smaller proportion of couples. As the overall patterns of giving showed, 79% of the participant couples made at least one gift to an LGBT organization in the past year, and several couples made multiple gifts or directed a majority of their philanthropic support to LGBT causes. Several theories support this giving behavior: social identification theory posits that the identification of the self with the needs of others can motivate giving (Shervish & Havens, 2002); similarly the mechanisms of values and beliefs are connected to both identity and larger societal experiences, such as discrimination or experiencing unequal rights (Bekkers & Wiepking, 2011).

In this study, the role of one's sexual orientation was connected to philanthropy in five distinct ways: first, the experience of coming out and facing discrimination or marginalization first-hand can activate a value of community building or uplift among

LGB populations and can even extend to supporting equality and justice for other marginalized groups; second, the experience of discrimination can also influence political values or beliefs, which may encourage one to use philanthropy to advocate for changes to public policy or law; third, as sexual orientation can often be a hidden identity category, some donors use their philanthropy to make a statement of LGB presence in the mainstream via donor recognition; and fourth, the unique experience of the HIV/AIDS crisis, particularly among gay men, provides both a historical and contemporary rationale for philanthropic giving among HIV-positive individuals as well as individuals who have lost close friends and family to AIDS. While these four themes are all factors that positively encourage philanthropic support to LGBT causes and align with donors' identities, I also detail a fifth theme based on identity, which activates a negative force: the decision to avoid giving to organizations that discriminate against the LGBT community, whether via organizations' actual policies or would-be donors' perceptions of discrimination. Each of these five themes is described in detail below.

Theme 1: Giving to Build and Uplift LGBT Communities

In describing giving to LGBT causes, many individuals reflected on their experiences of coming out as gay, lesbian, or bisexual and/or entering into their first same-sex relationship before becoming involved in LGBT-focused charitable organizations. Individuals described a common experience of first needing to take care of themselves amid a heteronormative and, in many instances, homophobic, society before helping others. As David, who was 51, recalled, "I come from a generation where being gay could mean your life. People were being killed when I was in my twenties for being gay, if you were in the wrong place, even if you weren't necessarily in the wrong place, just because. And you certainly could lose your job, you could lose your house, you could lose everything." Victor, a physician, who came out more recently, recalled, "So it took a few years, in my case, between the time I came out to the time I felt comfortable. But I think that since then, I have not [given] to charities, but I am very outspoken about things. I give a lot of talks about LGBT healthcare," and he had recently and successfully encouraged his employer to participate in the city's annual Pride parade. Often it was through these initial experiences that individuals began to connect with a segment of the larger LGBT community, both during college and afterward, which over time built their awareness of organizations that were focused on serving LGBT people.

Typically, it was only after participants grew in their own lives, including accepting who they were, beginning careers, and establishing same-sex relationships, that they were then interested and able to participate in philanthropy related to LGBT causes. Martha and Kathy, who came out in their 40s after meeting one another, recognized that giving to LGBT causes was not something they would have considered in their "previous existence" as "two white people in the suburbs," one of whom was married with three kids. As Martha said, "I think it's just more that it personally affects me now, so it's become a really important thing for me to support and to help further the cause." Martha also explained that, in her previous marriage to a man, he controlled most of the charitable giving, where now she felt able to make her own decisions.

Participants' donations to support and uplift LGBT people included giving to local organizations, such as the Indiana Youth Group, an LGBT youth organization, and the Damien Center, an HIV-services organization; national organizations such as the Human Rights Campaign (HRC) and Lambda Legal; as well as state-wide advocacy and political campaigns with a targeted focus on LGBT issues. Many participants had also volunteered for one of these organizations at some point in their lives, or for events and fundraisers that benefited these organizations, forming both organizational awareness and commitment (See Chapter Four). These donations often reflected the values mechanism of giving and the psychological benefits of giving, as participants expressed their desire to give back and support their community or to help make it easier for young LGBT people to navigate coming out today.

Participants frequently described their giving to LGBT organizations as giving to build a sense of community among gay and lesbian people. For David, giving both time and money was a way to become involved and contribute to his local gay community:

> I felt really politically involved in the gay community; it was a community thing, and I guess any kind of donating I did, whether it was to the HRC, to the Damien Center, and then to the [Indiana] Youth Group, it was always about the local gay community. What am I doing to help develop, or what little can I do to contribute to the gay community? To me, that was one of the most significant things: it was helping build community.

For gay and lesbian donors, there was a particular feeling that they were responsible for the well-being of other LGBT people and could give money or volunteer as a way to make a difference. As Tina described her current support for the Human Rights Campaign, she said, “I think it’s a cause that personally impacts me, and, having been gay for 25 years, I know what that journey looks like.”

At times, giving and volunteering for LGBT-related organizations or for benefit events was also part of a particular life-stage, often being single or still relatively young. David reflected on his past involvement, identifying a social aspect to it: “Especially when you’re single, you’re going out to the bars, you’re trying to meet people, make friends and so forth. Maybe that’s a bigger motivation for donating time and money too.”

Now that he was in a long-term relationship, he acknowledged that his giving and volunteering for LGBT organizations had dropped off. Robert and Henry shared that they provided more support to LGBT organizations early on in their relationship, and that it was also influenced by the culture of the gay male community in a different city.

> Robert: I would say certainly coming out, which for me happened really when we got together.
>
> Henry: Well, that's certainly when we got involved with HRC because we had friends who were couples or single people who were involved with HRC, and Dallas is an incredibly rich city that gives a lot of money to HRC. And we went to some of their social events there—
>
> Robert: And had a great time. So yup, let's sign us up.

As Henry and Robert discussed their giving to LGBT organizations, they also recognized that they were part of a generation of LGBT people that needed and appreciated having a "community of gayness" to be a part of. This was something they saw shifting in the present day, as LGBT acceptance was increasing and LGBT people were becoming more a part of the mainstream.

Many donors funded youth-related initiatives to support LGBT people, which represented what Garvey and Drezner (2013b) conceptualize as community uplift. Evelyn explained her gift to the Indiana Youth Group (IYG) as being shaped by her identity and commitment to support young LGBT people, particularly "the fact that we didn't have any sort of a support group like that as we were coming out." As Victor recalled his own experience of coming out, he linked it to the services IYG offers:

> I came out to my family after I moved [to the United States] when I felt safe. But if I would have come out or if I would have been outed by someone and I was still living with my parents, who knows if my dad would have kicked me out of the house. And then how many kids actually go through that, and they don't have anywhere to go, and they can go to the Indiana Youth Group. So it's trying to relate what would have happened in your youth, and now you can help prevent that.

Victor also connected his giving to the youth group as a way to give back after coming out and establishing a successful relationship. He said:

> Once you are in a good state of mind, once you surfaced through this horrible journey, then you feel the need to look back and say, "Wow, I'm here, and now it's time to help the others." So I think that the more you struggle, the more you feel that you should help others. That's how I feel about gay youth, for example.

Similarly, Jackie explained that her support of IYG was related to her own experience of coming out.

> I feel like, if I had an organization or a mentor or somebody like that when I was in high school, it might not have taken me so long to—I feel like it's taken me a while to catch up as a grownup. Again, if there had been an IYG for me growing up, that would have made a difference. I see this as an organization that really can make a difference in kids' lives in this area. And so I would say certainly my identity motivates my desire to do something for them.

Finally, Steven, a social worker who volunteered at IYG as a youth mentor, identified giving to LGBT organizations, including youth organizations, as a priority.

> If we're going to give somewhere like that, we've talked about we only have one sponsored [license] plate, and so we're like, "We can get another one," and I was like, if we do it's either going to be IYG or Damien Center or one of those just because those are where my interests or that's where my time is spent. That's where I see the need being more prevalent, just because I've worked with a lot of those youth, and I know those causes more.

Participants in the study who were younger than 40 expressed the motivation to build and uplift LGBT communities less frequently and were more likely to describe their sexual orientation as having little to no influence on their philanthropy. This included Heather and Tiffany, Beth and Melissa, and Jeff and Peter. As Melissa described, "I was 29 when I came out, and I was a grown adult with a career and a job and just kind of moseyed along." Two participants, Beth and Jackie, mentioned participating in their college gay-straight alliance, a club that was not available when some participants went to college. While they both identified themselves as part of a socially marginalized group as lesbians, both also embraced a larger narrative of social justice, which included anti-racism work, which they felt was more representative of their philanthropy than their sexual orientation. Incidentally, they were also both members of churches that were particularly progressive and supported social justice work. Their experiences reflected the theory of giving for social justice, which was documented by both Gallo (2001) and Kendall and Herring (2001) in their studies of lesbian giving. Donna, who was 48, also felt that being a lesbian had little impact on her giving. She reflected that not making LGBT organizations a priority in her giving was a result of her perception that the organizations catered more to gay men and underappreciated her and her wife as donors. She said, "I also figure there are more professional gay men that are writing big checks for those places. The treatment of going to HRC events, they lost it," meaning her philanthropic support. "We were leaders in our community and in the gay and straight community, very well-known people. I ended up singing and gave a talk for [an LGBT organization]. I gave $2,000 at the gala. I never received a thank you note *or* a follow-up solicitation." Still, understanding the generational changes around the motivation to support LGBT organizations will be important for researchers to focus on as current donors age and younger LGBT people consider where to focus their giving.

Theme 2: Giving to Shape Public Policy and Law

Another prominent subject was the fight for marriage equality, especially since the Indiana legislature had considered legislation in 2014 to advance a constitutional ban on same-sex marriage at the same time numerous other states were passing marriage equality. At least eight of the participant couples had donated money to the campaign against the legislation and/or had volunteered at phone banks and through letter-writing campaigns. This theme relates to the mechanisms of both values and efficacy—the ideas that donors envision an alternative future state and that, through contributing to nonprofit organizations, such change will occur (Bekkers & Wiepking, 2011). Heather, an attorney, had participated in pro bono work with her law firm's claim against the governor of Indiana to oppose the marriage ban. Participants also felt that there was a unique opportunity to advance marriage equality nationally, which would fundamentally affect their lives, at the same time the state legislature was trying to prohibit same-sex marriage from becoming legal. As Evelyn and Ruth describe:

> Evelyn: I'd say this year, I might be close to about a third [of my giving] for LGBT [causes]. But normally it would be not much more than I give to any other [cause].
>
> Ruth: But this year was critical. I mean, we knew once the Supreme Court made its decision this summer, that opened up a whole world of possibilities for us that didn't exist before.
>
> Evelyn: And some real hope.
>
> Ruth: Some real hope, exactly. And then when Indiana was going in the opposite direction, we said, "Well, if not now, when? I mean, we have got to get involved and do something about this."

Ann framed her giving to the marriage equality campaign as "a very specific topic that had a direct impact on us." Mark took a long-term view on the issue of gay marriage and said, "I think our particular interest in giving has kind of tracked as that issue has developed over time, as you see it become more of a reality." Several couples in the study had specifically waited until same-sex marriage was legal in their home state before getting married. As important as this policy decision was, it was also in flux, both in the years leading up to it and at the time of interviews. As Mark recalled:

> We did talk about maybe making a major contribution to one of the marriage equality organizations. But something changed from my perception about the legal issues that, suddenly, it looked like, "Well, we've hit a tipping point. I'm not as worried now about needing to contribute money to that cause because I think it's going to happen. The battle is over. It is now just going to fall into place."

Three days after their interview, the United States Supreme Court ruled in favor of same-sex marriage as a constitutional right.

The legalization of same-sex marriage was a crucial step forward for gay and lesbian couples in attaining equal rights, and many interviewees had participated philanthropically in supporting that effort. Yet other political and public policy issues that affected the LGBT community were going on simultaneously. At the time of their interview, Heather and Tiffany were both on the board of an emerging organization their friend started that promoted non-discriminatory service among local businesses, which had been established after a religious freedom rights law had been passed by the state legislature. Participants also named several issues that could potentially take the place of marriage equality in the future: transgender rights, a state or federal employment non-discrimination act, the need to include sexual orientation and gender identity as a protected class, and the need to remain vigilant as backlash against legal gains was ever present.

Theme 3: Using Philanthropy to Assert LGBT Identity in the Mainstream

Several couples approached their philanthropy as a way to assert their presence as leadership donors in non-LGBT affiliated institutions. For these donors, all of whom were male, giving as a same-sex couple was a way to show others that the organization was supported by a diverse group of donors, including same-sex couples. This rationale is supported by a reputational motivation or mechanism, which provides an intangible but important benefit of social recognition and approval (Bekkers & Wiepking, 2011). Tony and John had a pattern of donor recognition that supported this approach. Many years ago, they were the first same-sex couple to be acknowledged in John's university's donor magazine. More recently, they had made a gift to replace the Presidential Chain of Office, which is both explained and recognized in the university's commencement ceremony program each year. Tony said,

> The nice thing about that gift is that it talks about it in the program for graduation. And so, as a same-sex couple, it was important to us that it was given by "Tony and John" and that it's indicated in there and will be indicated in there until they change that chain of office. To me, it's important that we show students that, "Wow, there are alumni who are same-sex married couples."

To that John added, "That's very important to set an example. And also too, we believe that as many people should be out as possible, and the more we're out, if you will, even if it means being listed as a couple, that hopefully it will encourage other couples to do the same." A younger couple, Jeff and Peter, felt similarly about the visibility of the gifts they made together. Although they gave to only one LGBT-related organization, they felt their contributions to a wide-range of other causes were an important symbol as a same-sex couple. As Peter said, "Our being gay doesn't influence where we make our gifts. I think our being gay sends a message. Being a gay couple sends a message."

William and Carl, who had been in a relationship for seven years, similarly enjoyed being recognized as a same-sex couple who supported the arts community. Both had come out in their 50s and had been previously married to women with whom they had raised children and who were now adults. Now that William and Carl were in a successful same-sex relationship, acknowledging that relationship carried over into their philanthropy. William said:

> It's because we're happy, we're successful, and I feel that—I mean they're not accolades thrown at us, but I think that we are recognized as contributing to the community and as a gay couple. That's very, very gratifying to me. It enables me to contribute without question to the causes that I believe in. And I know that in my [prior] relationship for 40 years, I couldn't do that.

Carl went on to say that their giving not only signaled their commitment to the arts community, but it also provided a public affirmation of their relationship even though they were not yet legally married.

Similarly, it was important for Victor and Ryan to be recognized as a donor couple at Victor's institution of employment. When Ryan's name had been dropped from a gift acknowledgement letter and then was listed with a female salutation the year following, Victor called the foundation office to correct the error.

> So the first year came up just as my name. So I called them to say. "Hey this is from me and my partner. And his name is Ryan." Then the next year, he was addressed as Dr. and Mrs., and that pissed me off so much, I'm sorry, because it's—if you want our money, then just pay extra attention. And then something happened the third year that I remember that he was still not addressed the way I wanted, which is basic. I called them to say, "This is the last time I'm calling." And I spoke with the vice president of the foundation directly, and I said, "This is completely disrespectful." And since then, it was fixed.

Accurately recording and publicizing same-sex couples' philanthropy was both an important personal acknowledgement and a public statement. When recognition errors occurred, particularly in the realm of salutations or donors' names, they led to feelings of invisibility.

Aside from the male couples who stressed the public recognition, Evelyn discussed how she used her workplace giving through the United Way Campaign to make a personal statement as a lesbian by directing that gift to IYG. She said:

> There's a long list of organizations you can pick, and I've always had difficulty picking one. I was very pleased when IYG appeared there because, for two purposes. It's supporting an organization I like, and it kind of made a statement at work: who I am and that they have such a wide range of employees. So that was my thought in doing that.

While not every couple prioritized such public recognition for their giving, many couples did actively place both individuals' names on many of the gifts they were making to LGBT and non-LGBT-affiliated organizations alike.

Theme 4: The Experience of HIV/AIDS: Giving for Loss and Giving Back

Several male participants mentioned their giving to HIV/AIDS organizations as something they connected with their sexual orientation, a theme that was absent from the women in the study. Two of the male study participants were HIV-positive, and both supported local HIV/AIDS organizations philanthropically. Several participants described their giving and volunteering as something that occurred after the loss of one or more friends to the disease. In both instances, donors expressed rationales that were connected to both the psychological benefits they received from giving and the social identification they felt as they encountered friends and family affected by the disease (Bekkers & Wiepking, 2011; Schervish & Havens, 2002). Tony said:

> So this was before I met John—this is a long time ago. But my best friend died [of AIDS], and I got involved on a hotline, and then I was involved in some committee work. I was young and didn't have much money, but I gave what I could […] and I gave every year just because it was an important cause for me.

Michael was also active as a donor to HIV/AIDS, and he and his partner annually participated in the local AIDS walk, but he shared that he felt a shift in his giving over the past 10 years toward other causes. Looking back to apex of the AIDS epidemic in the 1980s and early 1990s, he said:

> I came out in 1981 at 18, and by ‘85 it was crazy. We found ourselves surrounded by countless people who were discovering they were HIV-positive and didn’t know what was going to happen… We found ourselves with a lot of quick, short friendships that also then ended quickly as well, as they got sicker. I think that, one year, we probably went to almost 30 funerals… So those kinds of experiences were pivotal and important, and I think they still speak to us now, but not with the same energy. I mean it just doesn’t feel to be the same driver even though, you know, because we can manage it now.

However, for the two participants who are HIV-positive, giving to HIV/AIDS organizations remains a central part of their philanthropy. Both of these men also identified their philanthropic support as “giving back” once they reached a more stable point in their lives. Paul had been involved in the local HIV/AIDS organization for more than 15 years, was a regular donor and volunteer, and had served on its board. He said, “I want to help people experiencing the infection of the virus to stay positive, because it’s easy to get depressed and down. So I try on a one-on-one basis, like with the food pantry, I try to keep people motivated and positive thinking.” Patrick, who was significantly younger at 34, also discussed his philanthropic support of the AIDS Fund, which was in addition to his job, which dealt with HIV prevention.

> [The Indiana AIDS Fund] is important to me because, personally, I am HIV positive, and I know that when I first found out, I was in grad school. I didn’t have anything, and I had a lot of folks helping me along the way, such as care coordinators here in the state of Indiana. And then when I finished grad school and got a full time job, it was important for me at that point to…give back and be able to help others when you were helped at a certain point of your life. For me, giving back to that community means a lot because it’s so personal. I got assistance at a time in my life when I was going through a really rough time.

Theme 5: Seeking Acceptance and Avoiding Discriminatory Organizations

One theme that appeared in response to a range of questions in at least 13 interviews was the idea that gay, lesbian, and bisexual donors sought out organizations they felt would accept them for who they are and consciously avoided giving and participating in organizations that openly discriminated against LGBT people or where there was a perception of discrimination. Participants often expressed quick judgments and strong feelings about organization they perceived as discriminatory. This was seen as a "barrier" to giving and was documented in a prior study of LGBT donors to higher education (Garvey & Drezner, 2013a).

First, several participants described wanting to feel welcomed into an organization where they could be their authentic selves. This could either encourage or discourage participation in an organization. As Ryan said more generally, "I think being gay, that's a big factor for us, is that we like to look to see where they stand on their past or their current view on gay rights. So that's always on [the] forefront of our minds when making that decision." For Ruth and Evelyn, a similar rationale supported their decision to become members of a Unitarian Universalist church:

> We went to the Unitarian Universalist churches because they are welcoming congregations. People have asked us to come to other churches, and we're going, "Well, I don't think so." You know that they didn't, we just didn't feel that we'd be really and truly welcome. (Evelyn)

Evelyn also described her thought process in making her United Way gift:

> I'd go down the list and have trouble finding something that I really wanted to give any money to. That I felt was something that reflected my values or that they reflected, you know, that they'd welcome me as a member. You look down there and you're going, "Well, they wouldn't want me or be real excited to have me show up."

Ruth supported Evelyn's sentiment, saying, "I mean, I just clearly have to believe that I would be welcome in that organization as I fully am. And if not, no." Similarly, Jessie said, "I would typically invest or donate time or money to organizations that share my beliefs or values. So for me specifically, I don't support organizations that are not supportive of gay rights or of equal opportunity."

Second, other participants explained how being gay determines which organizations they will not give to, and some individuals shared how they avoided or stopped giving to institutions they perceived as discriminatory in nature, regardless of whether the organizations' official policies supported that perception. Kevin explained, "Obviously anybody that we deemed to be not friendly to the community falls off the list immediately." Victor said, "We will never support anyone or we will never give money or any items to someone who does not support gay rights. That is a deal breaker." In response to a question about how being gay shaped his charitable giving, David explained, "It tells me who I won't give to for sure. Because if there's any organization that I think has any kind of negative either impact or outlook on the gay community, they're not gonna get a dime from me. I'm gay, I mean, I can't do that to myself."

Several organizations were repeatedly mentioned as discriminatory: the Salvation Army, Boy Scouts of America, and the United Way, which supported the Boy Scouts even when they had policies that banned gay scouts and gay scout leaders from the organization, policies that have slowly become more accepting over the past decade. David noted, "I will not donate to the United Way because of their association with the Boy Scouts of America. You know, there are no gay Boy Scouts leaders." John gave an identical example saying, "We will not give to United Way as long as United Way gives to Boy Scouts who discriminate there, and I know United Way gives to a lot of different organizations. Not a dime unless and until the Boy Scouts change their policy or United Way does not [support them]." Mark had also withheld his support from the United Way for several years, through which he had previously directed about $2,500 to several different organizations each year.

> [When] United Way refused to distance itself from the Boy Scouts' discriminatory practices, I stopped giving to them for maybe two or three year, and I did not go out to the organizations I had previously designated and say, "Here's some money to fill that gap." I just stopped relying on [the United Way], but then I went back to it.

On July 27, 2015, the National Executive Board of the Boy Scouts of America ratified a resolution to remove the national restriction on openly gay adult leaders and employees but continued to allow chartered organizations, including religious organization, to use religious beliefs as criteria for electing adult leaders and thus not allow openly gay leaders (Boy Scouts of America, 2015).

The Salvation Army was another organization frequently mentioned as discriminatory but often from a reputational perspective. Jerry said. "Well, we don't give to Salvation Army because—we haven't studied it, but we believe that they don't support gays, so we don't even give—I don't even give any money in the boxes." Patrick had a similar position toward giving to the Salvation Army.

> When I was first coming out […] I felt very strongly against giving to the Salvation Army because I had heard from friends that the Salvation Army discriminates against the gay and lesbian community. I think that some gay and lesbian communities throughout the country were putting fake dollar bills in the Salvation Army buckets that stated "Once the Salvation Army does not discriminate against the gay and lesbian community, this dollar bill will be real."

But Patrick's mindset had shifted over the past few years, and he was more open to contributing to the Salvation Army in the hope that it would benefit someone who needed help and could even change someone's personal views.

> Over time, I kind of evolved in my opinion on that, and I felt like, regardless of where the Salvation Army stands with their own personal beliefs, that if that donation does get to somebody who can benefit from that donation, then why squibble [sic] over the minutiae of the politics involved behind that organization? I may not agree with your organization and how they treat everybody, but if it can help folks, why not?

He returned to this topic later in the interview:

> Even though I still have those feelings towards organizations that may impede my own community, if I go up and have an interaction with that person, and they perceive me to be gay, maybe their ideals or attitudes towards my community may change. Maybe that's going to have an impact.

Patrick was clearly in the minority among participants. Another participant, Paul, concluded his thoughts about the Salvation Army by saying, "I feel they're selective with their help, and I don't feel you should be selective. You should either give to give or—I don't know. I guess I'm selective too. I don't give to an organization or any of them that I feel have dislike or hate for another group or another individual, especially gays and the GLBT."

Finally, several participants mentioned avoiding giving to other organizations, such as colleges and universities, and religious organizations, that maintained a lack of acceptance of LGBT people. Kevin explained how his coming out had led him to stop giving to his alma mater, an institution he perceived as not accepting LGBT individuals:

> I came out at 33, really late, so then I had to work through all my angst and frustration with the institutions and people that I felt like helped keep me boxed up, even though I had sought them out. [Laughter] So, it kind of got to the point where I felt like [my university] was not a very

> inclusive place, and I haven't wanted to support that. But I haven't tried to do anything to change it either.

Kim shared a similar perspective about her alma mater, incidentally, the same one as Kevin's, where she did donate, albeit minimally. "I would say they don't support me, so I probably haven't stretched to support them in their situation." Chris shared the story of receiving a solicitation from his husband, Steven's, alma mater, a Catholic institution.

> Before we were even married, the university started sending me letters as a friend of the university. I have no affiliation with them whatsoever, and it was a little like, "You're not giving them money because I really am quite perturbed by the fact that your university has a very, very strong stance against our type of relationship and yet will send me a letter than I'm one of their 'friends' seeking donations." I was not very receptive to that.

Chris also shared that he was less likely to give to any charities that are religiously affiliated because he had had negative experiences with religion that were based in his sexual orientation.

Although many couples talked easily about the organizations they would avoid giving to and their reasons why, some participants also struggled with the fact that these organizations do engage in productive work. Heather and Tiffany had supported a homeless shelter that would serve people even if they were LGBT but believed they could be converted to being heterosexual. Heather said, "We don't donate there anymore, unfortunately, because I think they do a lot of really good things. It's just—I don't have a lot of money to give, so when I give it, I want it to go somewhere that I know they're not discriminating against us too." The decision not to give was often a tension, rooted in one's own identity and based in an organization's real or perceived discrimination of a specific characteristic: sexual orientation. But this was certainly not the only factor that motivated participants' philanthropy, as explored further in the next section.

Identity and Philanthropy: Aspects of the Self

Few people define themselves by only one trait or characteristic, and other identities often played a significant role in interview participants' philanthropy. While the joint couple interviews did not allow for a full investigation of the many aspects of who people are, I asked participants an open-ended question to explore how their broader identities influenced their philanthropy. Because of the nature of the study, participants often discussed their sexual orientation as a part of that relationship, but others clearly placed sexual orientation in a larger context of the self or downplayed its role altogether. As Ruth said, "Most of my giving is to non-GLBT [causes]. And part of the reason for that is that I see myself, my identity, is much bigger than my sexual orientation. It's much wider. There are so many elements to my identity in addition to my sexual orientation that I find myself sharing my resources with many of those elements." Similarly, Kathy, who with her partner Martha gave to a range of organizations said,

> I'd like to think that us being gay is the least interesting thing about our lives. Because, to me, if that's what somebody [who] were to come in contact with me or with us would be their take away, I'd be extremely disappointed. Because to me that's the least substantial part of my life, other than I was brave enough to admit it and found somebody that I love and will love for the rest of my life.

The identity characteristics participants shared as influencing their philanthropy were wide and diverse. Some mentioned hobbies and interests, life stages such as becoming parents, religious or political beliefs, values such as environmentalism, or professional identities such as being a social worker. A selection of participants' responses is presented in Table 4.

Table 4: Aspects of the Self that Influenced Philanthropy

Name(s)	**Self-Described Identity**	**Example**
Ruth	Singer; golfer	I identify as a singer, and I identify as a golfer, so those are definitely organizations that I give to.
Ryan and Victor	New parents	Ryan: And then parenting, obviously, within the past few years is another issue that was never on our radar. Victor: I think children will have—anything related to children; children, gay youth and supporting education—I think that's what matters.
Jessie	Environmentalist, Secular humanist	I identify as a naturalist or environmentalist to a certain degree, and that strongly influences where my money goes. And as a secular humanist, I believe in my fellow man.
Carl	Catholic	I give to St. Mary's because I'm Catholic and I attend the church regularly, and faith is extremely important to me. I'm not as active in the ministries as I was when I was in [the suburbs], but it is absolutely a vital and important part of my life and I think our lives.
Steven	Social worker	I'm in the social work world. I've worked in community mental health for 10 years at this point. And if you work in community mental health, it's home based, and I've been in homes that were barely habitable. So I look at that and go, "Even when we're struggling, we are a lot better off than they were. We have something."

Again, these responses show the diversity of gay and lesbian couples' identities and, in part, explain why their giving is not just focused on LGBT organizations. Another participant, Brenna, described herself as a "bleeding heart" who supported animal welfare organizations, food banks, and individuals who were homeless. As Karen reflected on her giving, she said much of it was motivated by illness and loss, including losing her first partner shortly after they adopted two children—certainly a defining moment in her life. She said, "It is interesting to me that the life experiences haven't been around identity or orientation. They've been around illness or something else."

Two participants specifically referenced women's issues as an identity category that shaped their giving—one female participant and one male participant. Cheryl, who identified as gay had been a member of Planned Parenthood for a number of years and saw it as an important organization that she would continue to support. She said:

> Planned Parenthood, gender identity, seeing as I'm female, it's one of the reasons I support Planned Parenthood. Just because when you mix female and poor, then you get… how do I want to say it. You're limited in your options. You're controlled by a very white male Congress that decides whether or not you're going to have a child and yet the same thing is not held out for the fathers of the children. So I think for me, I think it's a gender thing because Planned Parenthood I see predominantly for females, for women. And so, I just, I think women's reproductive rights and that sort of thing, that's a hot button issue for me. And so that's probably one of the reasons I got involved with Planned Parenthood. It's more gender, not gay, just gender.

Mark, who also supported Planned Parenthood, as well as a domestic violence shelter for women, said he saw women's issues as incredibly important because of the way he saw women's issues and sexual orientation intersect, particularly in fighting for equal rights.

> I think identity plays a large role in the giving that I've done, whether it's based on sexual orientation or issues that I've experienced like women's rights and immigrants. Part of that comes from having divorced parents and being raised by a single mother. And so, I've often thought single women raising children is very hard. I was born in 1961, and I think of my politics as democratic left. When I was a kid, I remember the Equal Rights Amendment being talked about. Definitely in my own lifetime, in my own experiences, my mother, who was a school teacher, had to quit her job when she got pregnant with my little sister because they were going to fire her if they found out. And so, I do think it's an issue of overcoming social barriers and ideas about equality, and I think they are very related concepts. I think that sexual orientation has followed a lot along the lines of gender equality and race equality. We've really come in on the coattails of these movements. So yeah, absolutely, I think they're very much related especially for lesbians. Yeah, it affects me. It affects absolutely how I view the world.

Several white, lesbian donors made references to supporting social justice and racial justice causes. Carol said, "We're very plugged in to the social justice world, really not focusing on LGBT issues at all, but on civil rights, justice, and the natural world," and she and her wife saw themselves as people who were aware of and worked for issues that dealt with race and class. Similarly, Beth led a conversation about race and white privilege for her church and saw her sexual orientation, which was marginalized, as something that connected her to advocating for racial justice:

> [By] identifying with a sort of socially marginalized group, I think that we're both really passionate about, like we mentioned, anti-racism work, wanting to be engaged in really intentional conversations about race and class and ways that systems work against people that get in the way of their success.

Understanding how marginalized identity, such as one's sexual orientation, may relate to support of other minority groups or the larger concept of social justice deserves further study.

Motivations for Giving

Aspects of individual identity continue to be an underexplored motivation for giving; however, participants described numerous other motivations for their philanthropic support, many of which have appeared in the academic literature on giving behavior. As participants recounted their giving over the past year, I asked them to elaborate on why they started giving to an organization and what motivated them to continue. I also asked what makes them less likely to give to a particular cause or organization. Each of these responses was coded *in vivo*, and the codes were developed into broader categories or themes. Through the interviews, I identified an additional 10 motivations for giving, along with four specific barriers to philanthropic support. These motivations were classified according to the eight mechanisms of giving by Bekkers and

Wiepking (2011). Table 5 displays the *in vivo* motivations, mechanisms, and example quotes, and is arranged according to the number of participants who referenced the motivations as inspiring one or more of their gifts.

Table 5: Motivations for Giving

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
Personal connection to someone involved or affected	Awareness of need; solicitation	If a good friend of ours got involved in some organization and felt strongly behind it, we'd give if they ask us to give. (Cheryl) My sister has MS and has been confined to a wheelchair for 20 years now, in a nursing home for 10. She does a walk every year with her family. They're in Ohio. I don't attend, but I, or we, will be her biggest donor. (Kim) In some of the cases, I become involved with organizations that friends will ask me to be become involved with. I enjoy that. I enjoy that social interaction. (Peter) For me, it's the gifts that I make in honor or in memory of someone that are the most meaningful to me. Like for my aunt, she was a huge American Legion Auxiliary woman, and I got a letter... no, I was at a Rotary meeting and their legion president spoke about the Poppy Program and World War II and all that stuff, and I just felt moved by that to make a contribution in my aunt's honor, her memory. I think those are the ones that mean the most... from an emotional standpoint. (Peter)	31
Personal experience and/or passion	Awareness of need; values	The reason why we chose the Julian Center is because they—in a previous relationship, it was an abusive relationship that I had and someone from the Julian Center helped me because I	26

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
		didn't—I mean I was in my first year of moving to this country, and I didn't know where to go. Someone told me "I know this person at Julian Center. They can help you." So they helped me file a restraining order, and then that resolved the issues. That's why my passion for the Julian Center comes. (Victor) I've designated both of those [gifts] to the Humane Society. I think getting the dogs has really made me feel a responsibility to—they've given us great joy over many years, so I feel a responsibility to give back to that organization specifically. (Jackie) Education, at the end of the day, solves so many problems. My strong desire to give to education is because I really think that that is so important. It makes or breaks a person. (Peter)	
Belief in organization's leadership/ effectiveness	Efficacy	To me, if you have an executive director or leader that's really, really passionate about his or her organization, it can really make a big difference. (John) But the leaders of the organization, I thought were very well-spoken and represented the organization well. So I came away impressed to the point that I was like, "You know what, I'd do this again." I liked the organization. (Tina)	25
Tax benefits	Costs and benefits	For me, because I'm a numbers person, it always goes through my mind, always. I think, "Okay. I'm giving $1,000. That's only costing me $700 and $750." And it's because I'm a numbers person, I will also specifically time my deductions sometimes because of taxes so that if my—the [theater], for example, is on a fiscal year, I will time my $1,000 contributions to where one year end up being $2,000. The next year on my	24

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
		taxes, it will be zero so that I can bunch up my deductions. William may not even understand what I'm talking about. I don't give just because of the deduction, but I give more because of the tax deduction. (Carl)	
Organizational affiliation (board member, membership)	Awareness of need	Well, I know when I was both an officer in a chorus and on the board for that group, we were in serious financial trouble. And I was generous then. I was giving $500. I was giving what I would consider large gifts to try to keep the organization alive. And I did that partially because I saw a groundswell of effort from other members of the organization. People understood that this was very important and if we didn't do something now, we weren't going to be around in a year. And so that was really, you know, I felt both a responsibility as a chorus president and a board member but also a level of commitment that I really wanted this to go on longer. I liked what we were doing, and I wanted it to continue […]. So a commitment and responsibility. (Ruth) Probably my biggest gift is that I'm on the board of directors for a Parkinson's organization. And so, I feel like they expected all of the board of directors to give a good amount. So I gave about $1,000 a year to them. I mean, they said, if they apply for grants, they need to be able to show that the board is participating at a full amount. I don't know how I came up with the amount that I chose. (Anne)	20
Religiosity/ tithing	Values	For me, the motivation is faith-based distinctly […] I think that there are very clear tangible statements throughout the Bible encouraging Christians to be of service to the community and to their neighbors in pursuit of a beloved	15

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
		community, a better community. So for me, the racial justice matters because for me, it ties back to a biblical mandate, feeding the hungry matters because my faith tells me that that's important. (Melissa) We both were raised in communities of faith that stressed a tithe of 10%. And in our charitable giving, we strive to look at how can we at least give away 10% of our net income in a combination of arts, faith, and things that make sense, what we believe in. So it all starts with the fundamental reason why we give, is we've been given resources and it's our responsibility to share them back and do good work with that money. For me, it is a fundamental belief that everything, all things, come from the Divine Source–gifts, talents, skills, resources. Giving to the church is not philanthropy; it is not. Philanthropy is when we have money that is not going someplace else and we want to do good work in the world. Giving at church is a responsibility. It is not a charitable contribution. (Donna)	
Donor recognition and benefits	Costs and benefits; reputation	To [arts organization], we give about $800, almost $900. And we give at that level because it qualifies us for what's called the Isadora Society, which means you get a free drink before the show and at intermission, but it's just kind of fun to–we enjoyed socializing when we go to the events. So that aspect of it, we enjoy, and that's probably why we give at that level because it gives you a little bit of special treatment, and it feels good. (Carl) Chris: NPR is one we end up giving to. Steven: I really like NPR. Chris: He is an NPR junkie. I'm an occasional NPR lover. We tend to give	11

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
		during the pledge drives. Steven: Yes, we did. Last year I know we did the $120 [level] because we got tickets to Trans-Siberian Orchestra. This year I think I dropped it down. Well, they haven't had the main one where they give the tickets yet, but I think I gave something in the spring.	
Desire to give back	Altruism; psycho-logical benefits; values	To me, it's my belief in God and that God has given me and us a lot of gifts. We have a really good life, and that part of my faith is that we give back. That's what it's all about. (Jerry) Back to the Indiana AIDS Fund, when I make those donations, I remember back to a time where donations that other people gave helped me through a time that was difficult for me. (Patrick)	9
The joy of giving	Psycho-logical benefits	Well, I love the arts. I was raised by a single mom. I was raised very working class, but Mom always had a very high focus on the arts and culture. So for me, marrying somebody who's deeply embedded in the arts, this is just so much fun for me because I love it so much. We have gifts to everything from dance companies to youth orchestras. (Carol)	5
Alleviate guilt	Psycho-logical benefits	So, in a lot of those instances, it is about just managing your guilt. That, for me, that we're lucky, and we're fortunate, and so you throw a little money at it, and you feel a little less bad about [it]. Cause I think that's an ongoing thing, where I feel undeserving sometimes of what we have in life. And feeling undeserving and I can share some of what we have, that makes me feel a little less guilty. (Kevin)	3
Barriers			
Over solicitation	Solicitation	I look for reasons now not to give, to be honest with you, because I do have limited income, and I have, for example, stopped giving to some organizations	15

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
		because they do way too much solicitation. And I feel that they are spending too much money soliciting rather than mission oriented. So I have specifically dropped some that I used to give to for that reason. (Carl) I guess for me, what turned me off from donating further was the constant mailing of stuff afterwards, mailing little gimmicky things like stamps to put on your letters with your name, like return address labels. And just tons and tons of really expensive kind of mailings that just left me feeling, "Well, am I giving you donations to do something with them or am I giving donations so that you can continue to solicit donations?" Which, I understand that that's necessary in its own way but like it seemed the balance was a little too much. It was very excessive. (Chris)	
Negative perception of organization and/or leadership	Efficacy	I do not have much confidence in the executive director. So I think we would give more, but I'm not that confident in the leadership. The leadership of the organization and the confidence you have in the organization I think definitely affects our giving. (John) I use GuideStar every now and again. Not that we ever give to any of those major places, but I do like to look at that. It gives me a sense of the organization, I think. When I was looking for a place to work, when I switched community mental health centers, I just looked up because they're all nonprofits, so I could see what their CEOs are making, and it made a difference to me that the place I was working, their CEO was making like $270,000 or something, and the place I moved to, he was probably doing more work honestly. I don't know. It was like	12

Motivation	Theory/ Mechanism	Example(s)	Number of Participants
		$105,000. And to me that said a lot about the organization. (Steven)	
Lack of recognition/ errors	Solicitation	I typically give through the mail. I get a letter, a solicitation letter, and most of these ones I'm on the list now. And I write a check and send it back and wait for my thank you note. And actually, I have actually dropped organizations that don't thank [me]. (Ruth) We were leaders in our community and in the gay and straight community, very well-known people. I ended up singing and gave a talk for [the organization]. I gave $2,000 at the gala. I never received a thank you note or a follow-up solicitation. I was like, "Wow, I guess you don't want my money." (Donna)	8
Lack of awareness	Awareness of need	The other thing is like how much aware are you of organizations that truly need money and that's the thing. We don't know. We would like to know because–I mean can we–like right now can we give more money? Absolutely, we can. It's just that we don't know where. I think that's one of our limitations, and it's our own fault. (Victor) I feel like the kids that are getting picked on, the kids that get bullied for being gay, I would love to get involved with that, but I don't know enough, and I haven't had the time to look into what avenues might be there to support those children. (Heather)	4

Among the study participants, the most prominent motivation to give was a personal connection to someone involved or affected by the organization, closely followed by a donor's personal experience with an organization or passion for a cause. Both motivations reflected the ways participants learned about organizations and developed an awareness of their mission and need for support. This ranged from first-hand experience, being a participant in or beneficiary of an organization, being asked to give by family or friends, giving in honor or memory of someone, and serving on a nonprofit's board. While these motivations are clearly related to one another and can be difficult to separate at times, they all represent pathways through which potential donors learn about organizations and become involved. Participants frequently cited their personal experiences as beneficiaries of organizations' programs or services or gifts in honor or memory of someone as being some of the most meaningful gifts they had made, both annually and in their lifetimes. In contrast, participants frequently viewed the requests to support friends' organizations or giving expectations that came with board membership as a responsibility that was distinct from a more personally motivated gift.

Another common motivation for giving was belief in the organization's effectiveness, in other words, the efficacy of their gift in furthering the organization's mission. Participants often related this to the organization's leadership, as well as their overall effectiveness in being able to deliver on their mission. Conversely, a negative perception of organizational leadership and/or effectiveness was a barrier to giving for some participants. These reputational motivations or barriers were determined by both first-hand knowledge of leaders and organizations, as well as media reports, word-of-mouth from friends and family, and nonprofit information sources, such as websites like GuideStar.

Two motivations reflected the costs and benefits of giving, donor recognition and benefits, and tax deductibility, and while a number of participants mentioned them, most downplayed their significance in their giving. For tax benefits, participants in a range of income categories cited the ability to receive tax benefits as a nice incentive for giving, though many noted they would continue to give even without tax deductibility. Larger donors were usually more likely to track this benefit closely, and some participants did not take advantage of the tax benefits at all. Similarly, some donors valued the recognition and perks of being a donor at certain organizations. Often this was connected to receiving a thank you gift for giving or a social benefit for reaching a certain donor level. These benefits were mentioned by more than a quarter of the participants.

Despite the fact that LGBT individuals are less involved in giving to religious organizations than the general population, a number of the participants in this study were deeply motivated by their faith and religious beliefs as a motivation for supporting not only their church or religious organization, but also a wider group of nonprofit organizations. Multiple participants mentioned tithing as either something they had in mind when giving or as a specific goal in giving away 10% of their income. Giving back, either in gratitude for services received or as gratitude for the gifts of a good life and financial resources was another value that some participants expressed. Finally, a few participants specifically mentioned that they found joy in giving or that it alleviated guilt, two psychological benefits that are less well-studied.

In addition to their motivations, participants shared several examples of what made them stop giving or what turned them off from supporting an organization beyond the barrier of perceived or actual discrimination discussed earlier. Over-solicitation was the most frequent deterrent; while participants struggled to define at what point an organization was asking for gifts too excessively, they easily recounted stories of receiving too many letters in the mail, fancy mailings, or weekly (or more) emails asking them to give. Participants also expressed the feeling that these organizations spent too much money trying to get an additional gift, funds they felt would be better applied to the mission of the organization. A similar complaint was about organizations that failed to thank donors after making a gift. Regardless of gift level, participants wanted to know that their gift was received and appreciated, and a lack of response on the part of the organization was viewed negatively and often resulted in a donor stopping his/her support. Other critiques included organizational inefficiency, unnecessary spending and ineffective leadership. Finally, a few participants noted that they had the ability and desire to give more but lacked awareness of which organization could best use their gift. While few nonprofit organizations have savvy marketing efforts, this finding reveals that there are missed opportunities for organizations to connect with donors who would be interested in supporting them.

Conclusion

Personal identity is one motivation that influences and shapes donors' philanthropy. For same-sex couples, sexual orientation guided philanthropy in one of five ways: through building and supporting the LGBT community; advocating for public policy for equal rights, including marriage; being a recognized same-sex couple supporting mainstream organizations; giving back to HIV/AIDS organizations because of personal experiences, such as being HIV-positive or experiencing loss; and avoiding giving to organizations perceived as discriminatory. As Kathy said, however, "I'd like to think that us being gay is the least interesting thing about our lives." While sexual orientation prompted some individuals' philanthropy and was a key part of their giving, most couples continued to give the majority of their philanthropic support to other causes.

This pattern is influenced by other aspects of who participants are, as well as other motivations, such as personal experiences and passions, influences of friends and family, organizational leadership and effectiveness, and values such as tithing and a desire to give back. These multiple motivations suggest complex processes that support individual philanthropy. These findings are further discussed in Chapter Seven, in an inductive theory of charitable giving behavior as well as the study's implications.

CHAPTER SEVEN

SUMMARY, DISCUSSION, AND IMPLICATIONS

This study examined the philanthropic engagement of same-sex couples and the role of identity, motivations, and decision-making in influencing their giving. The research was guided by the question, how do members of same-sex households describe the meanings and experiences of their philanthropic participation? In short, this study sought to detail same-sex couples' involvement in philanthropy, without relying on a group of donors identified via their giving to LGBT organizations specifically, and to understand how their philanthropy might be similar to and different from that of different-sex couples and the population at large, in order to help refine existing theories. This chapter summarizes the study; discusses the findings relating to LGB philanthropy, motivations, identity, decision-making and gender; and puts forward a theoretical model for charitable decision-making among the study population.

Summary of Study

Using a qualitative and interpretative methodological approach with grounded theory methods, this study examined the philanthropic practices of 19 same-sex couples in Indiana. The study was divided by gender with 10 male couples and nine female couples participating as one way to create a diverse sample and to also understand how philanthropic engagement was shaped by gender. While a diverse representation of same-sex couples was a goal for this study, the participants represent a disproportionately highly educated and high income-earning sample.

Participant couples completed semi-structured joint interviews where they discussed their philanthropic giving, focusing on their giving in the past year, as well as their household financial management, charitable decision-making practices, motivations to give, and the role of identity in shaping or influencing their philanthropy. Participants were also asked to make a giving decision at the end of the interview. Interviews were transcribed verbatim and first coded line-by-line with more focused coding following, typical of grounded theory analysis. These focused codes became the categories and themes described in Chapters Four, Five, and Six. Using grounded theory procedures, these categories also are presented in a theoretical model of charitable giving following the discussion.

Discussion

The following discussion returns to the major themes of the literature review in Chapter Two and integrates the existing research with this study's findings. I begin with an overview of LGBT philanthropy and the giving practices of the same-sex couples in this study, as these results frame the remaining discussion. The next section addresses motivations for giving and is then followed by the role of identity. Then, household financial management and charitable giving are discussed. Finally, gender differences in charitable behavior are examined in light of the study findings.

Same-Sex Couples' Giving and LGBT Philanthropy

Few studies have considered LGBT individuals' philanthropy in any significant detail. Of the studies that do exist, several are quite dated, appearing nearly 20 years ago, while more contemporary research has focused on LGBT individuals' support specifically to LGBT organizations (e.g. Horizons Foundation, 2008) or have narrowly focused on giving to one charitable subsector, such as higher education (Garvey & Drezner, 2013b). Even though LGBT individuals may comprise the majority of donors to LGBT organizations, we cannot assume that this is where the majority of LGBT individuals' and couples' philanthropy is directed. Similarly, not all LGBT donors choose to support institutions of higher education.

This study demonstrates that the majority of participant same-sex couples' philanthropic support was not directed to LGBT organizations, but instead to a wide variety of mainstream nonprofit organizations across a range of charitable subsectors. In this study, while 79% of couples reported giving to at least one organization with an LGBT-affiliated mission (including services for HIV/AIDS), only 15% of the total number of gifts was directed to these organizations. On one hand, these results show that many same-sex couples do support LGBT organizations as part of their philanthropy; yet, this is not LGBT donors' only philanthropic interest. Instead, same-sex couples direct a majority of their gifts to other nonprofits, including a high percentage to human service, public-societal benefit, and arts and cultural organizations. These findings are significant for both LGBT-affiliated and mainstream nonprofit organizations. LGBT-affiliated nonprofits need to recognize that they are in competition with a wide variety of organizations for LGBT donors' philanthropic support. As many LGBT nonprofits are newer organizations, often with less capacity than their nonprofit peers, investments in their fundraising capacity is warranted in order to be able to attract new supporters and steward current donors (Horizons Foundation, 2008). As participants such as Victor and Ryan explained, they have the ability to give more charitable gifts and were interested in supporting a local LGBT youth organization, but they did not feel as though they knew enough about its work to make a donation. Similarly, participants such as Ricardo and Mark, who had considered making a large gift in support of the marriage equality movement, may need further outreach and cultivation to understand why a gift is needed now that same-sex marriage has become legal in all 50 states.

Second, these findings are important for all nonprofit organizations in that they may receive important and significant support from LGBT donors and can do more to recognize their current LGBT donors, as well as pursue opportunities for growing their donor base within the broader LGBT community. The wide variety of philanthropic support by the study participants shows that LGBT donors would consider giving to potentially any nonprofit organization, including religious organizations, under the conditions that they would be welcomed and affirmed. As the latter finding regarding the avoidance of giving to discriminatory organizations showed, the only organizations that same-sex couples repeatedly avoided were those they were perceived as discriminatory or that had explicit policies that were discriminatory in nature. While most of these policies dealt directly with sexual orientation, policies that discriminated against other populations were also viewed negatively, as some participants, including both men and women, expressed a sense of shared support between LGBT participants and other marginalized groups. For this reason, all nonprofit organizations that want to attract and cultivate LGBT donors would be well-served to examine their own organizational policies to make them as inclusive and non-discriminatory as possible. Beyond gifts of money, the study participants also exhibited high volunteerism and board service, which should be attractive to nonprofit organizations. Once participants became acquainted with an organization, either through personal experience, family or friends, or through their work, many participants became long-term supporters and provided both a regular source of annual giving support as well as volunteer time.

The Horizons Foundation (2008) also identified planned giving as an important strategy for LGBT organizations and as an opportunity for LGBT donors, particularly those without children. Even though the average age of study participants was 47.5 years old, younger than most adults who make charitable provisions, there was strong support for including charitable organizations in couples' estate plans. Six couples had already included nonprofit organizations in their estates, significantly higher than the average planned giving of all Americans, which averages about 1 in 20 households among adults older than 55 (James, 2013). Whether the propensity for planned giving among same-sex couples will change as more couples marry, and potentially have or raise children, remains to be seen. However, the current generations of married and partnered same-sex couples should be approached by the nonprofit organizations they currently support to discuss the possibility of making legacy gifts.

Motivations for Giving

As much of the philanthropic giving literature has focused on the motivations for individual charitable giving, this study offered two unique contributions: the opportunity to understand donors' motivations in their own words using qualitative methods, and the ability to examine motivations from a marginalized and underrepresented group, LGB individuals. Additionally, by classifying how often certain motivations were discussed among the different participants, this study offers an understanding of what donors identify as their most salient reasons for giving. A discussion of these motivations is presented here, and then I return to the motivations in the theoretical model of charitable decision-making.

Bekkers and Wiepking (2011) present a comprehensive review of much of the charitable giving literature from a variety of disciplines and identify eight mechanisms that drive charitable giving. In this study, I identified motivations and then classified them according to mechanism, noting where individual motivations might reflect more than one theory or mechanism for giving. The presence of multiple mechanisms of giving embedded in a particular motivation speaks to the complex and interrelated nature of giving and can also inform theory, a development of Bekkers and Wiepking's work. Bekkers and Wiepking present the mechanism of "awareness of need" first. As the donors in this study explained, having a personal connection to someone involved or affected by the organization, or having their own personal experience with the organization, was critical to participating philanthropically. Like the practitioner's fundraising adage goes, "Donors give to what they know." Knowing about organizations, whether through primary experiences or second-hand knowledge, seems to drive a large portion of charitable giving.

Closely related to personal knowledge and connections, however, is the belief that nonprofit organizations are effective and can deliver on their missions. Donors in the study expressed the mechanism of "efficacy" most often through their knowledge of the organization's leadership; the organization's presentation of itself through events, emails, and mailings; and its reputation at-large. Study participants did not discuss organizational effectiveness as connected to their identity as LGB individuals, suggesting that this motivation may be more closely aligned with giving motivations of the general population. While some donors were able to evaluate efficacy closely, as board members of an organization or as volunteers, sometimes just the idea of efficacy was enough to motivate a gift. Conversely, when donors lacked confidence in organizational leadership, felt or learned that the organization spent a disproportionate amount of money on executive compensation, or heard about mismanagement through media coverage, this was a strong deterrent for giving. Thus, organizational leadership and reputation are critical to building donor support and need to be managed proactively to encourage donors' trust in the organization.

While the costs and benefits to donating have been studied extensively as a motivation, particularly by economists, tax benefits and donor recognition and benefits mattered less to participants. Further, participants in the study were quick to contextualize that while they enjoyed benefits like a tax-deduction or donor recognition society, they would be likely to continue to give even if those benefits did not exist. Instead donors talked about these benefits as "something to take advantage of" or as "special treatment." Particular to tax benefits, some donors did not take advantage of tax benefits at all, while some sophisticated donors spoke of the role of tax deductions in timing certain gifts in order to maximize a deduction one year. Despite the number of times these topics were discussed, the costs and benefits of giving were clearly secondary motivations to mechanisms like values and efficacy.

Two motivations, faith-based motivations for giving and the idea of "giving back," served to highlight the values mechanism, a motivation for giving that the philanthropic literature has explored less often. In this way, qualitative research can serve to fill a gap in the literature on giving, as values characterize giving as a self-expressive act (Burgoyne, et al., 2005), which is difficult to capture through surveys and experiments. A key motivation for over one-third of participants was a faith-based value around religious beliefs, including tithing. This was interesting to explore, as research has shown LGBT donors are less likely to support religious organizations (Horizons Foundation, 2008). While 42% of study participants supported a religious organization in the past year, several more participants referenced the value of faith that they learned as children as continuing to influence their giving today—both to religious and secular organizations. At times, participants discussed giving as part of a religious mandate, but "giving back" was also explained as reciprocity for services received or experiences donors had and wanted to ensure were available for others. In addition to the mechanism of values, giving back was also connected to the mechanisms of altruism and psychological benefits. Motivations such as the desire to give back reveal the potential interaction among multiple mechanisms of giving.

In addition to the desire to give back, two other motivations represented psychological benefits, though these were mentioned less frequently in the interviews. Some participants specifically referenced joy, happiness, and pleasure in supporting nonprofit organizations. Others specifically gave to nonprofits, and particularly human services organizations and individuals in need, as way to manage or alleviate guilt, particularly around feeling as though they had more resources than they needed and thus had a responsibility to share those resources and help others.

Finally, Bekkers' and Wiepkings' (2011) mechanism of solicitation was more frequently mentioned as a barrier to giving than something that actively promoted it. While solicitation was viewed favorably if the request came from a family member or friend or as part of board service, many participants criticized organizations that solicited them too much or used what seemed like expensive methods and tactics to ask for another gift. While participants found it difficult to define what a good pattern of solicitation would be, constant emails and monthly or more mailings seemed to be more of a turn-off for support than an enabler. For donors who made gifts to an organization once, or at most twice, per year, nonprofits' frequent requests to donate were seen as annoying and a poor use of organizational resources. Similarly, and also of importance, donors were turned off by organizations that failed to thank them for their gifts or had made recognition errors in their names, particularly errors related to correct recognition of both members of the same-sex couple. These findings represent important knowledge for nonprofit organizations to reflect on their systems and processes of solicitation and recognition. Even one missed acknowledgement letter for a gift, or an erroneous Mr. instead of Ms., could be enough to encourage donors to look to other organizations to support.

Role of Identity in Philanthropy

A key contribution of this study was a better understanding of the role of identity, and specifically sexual orientation identity, in motivating philanthropy. While the literature on LGBT giving is thin, this study supports and expands on the existing research findings that community support and uplift, social justice, and social acceptance would all serve as motivations to give to nonprofit organizations (Flandez, 2013; Garvey & Drezner, 2013b; Gallo, 2001; Horizons Foundation, 2008; Kendell & Herring, 2001). The findings in Chapter Six explain five distinct ways participants' sexual orientation influenced their philanthropy. While the role of identity had previously been unexplored as it related to the eight mechanisms of giving, the findings demonstrate the confluence of multiple mechanisms in identity-related motivations.

First, like Garvey and Drezner (2013b) found in their study of LGBT alumni giving to higher education, one identity-related motivation is that of supporting a community one identifies with, often described as community uplift. A sense of uplift has been found among a number of other identity-specific groups' philanthropy (Cabrales, 2013; Gasman & Bowman, 2013; Tobin et al., 2003; Wagner, 2011). In this study, I found that one condition that promoted philanthropy specifically for LGBT causes was participants being at a point in their lives where they felt secure in their identities, including coming out, having professional success, and/or being in a long-term relationship. Some participants also discussed getting involved in LGBT philanthropy as a way to meet people and be social, while forming one's identity within their LGBT community. This motivation—which study participants outwardly stated in comparison to Garvey and Drezner's (2013b) study, where it was more implied—was related to mechanisms of both psychological benefits and values. Psychological benefits occurred when participants felt a sense of belonging; a commitment to help others, particularly LGBT youth; and a desire to address societal discrimination against LGBT people. As this motivation was clearly different from giving back, this closely represents the social identification theory of Shervish and Havens (1997). In this theory, it is via the identification with others that a donor is motivated to participate philanthropically. Because participants had experienced discrimination themselves, witnessed it first-hand, or could imagine it happening to themselves, they were able to identify with the clients and beneficiaries of LGBT organizations in a relational way that encouraged giving to LGBT-affiliated organizations.

Related to both the mechanism of values and social identification theory was giving to support political change for equal rights for LGBT people. While this also relates to a broader support for social justice (Gallo, 2001; Kendell & Herring, 2001), it was a specific rights-based justice as applied to the LGBT community. Given the time period during which this study took place, giving to support marriage equality was a prominent behavior among the study participants. Some participants described this form of giving as time-sensitive, in that it varied year-to-year depending on the political tenor. Others maintained regular support for rights-based organizations like Lambda Legal and the Human Rights Campaign, which pressed for equality through legal and political means. This was a particular kind of community support and uplift: charitable giving in support of political activism and equal rights for LGBT people.

Another motivation that also related to social identification theory, as well as the mechanisms of values, psychological benefits, and efficacy, was support for HIV/AIDS organizations. The AIDS crisis, which lasted from the 1980s into the 1990s, was a significant time period for many gay men in the study. These men recounted attending numerous funerals, losing best friends, and being volunteer “buddies” for men who were dying. For these participants, these experiences generated long-term commitment to HIV/AIDS organizations that continued to provide services to those affected by the disease, as well as support prevention efforts and programming. While donors like Michael felt that the urgency of the crisis had faded today, they said that regular, consistent support was still necessary. Similarly, the two participants who were HIV-positive felt that regular charitable support of these organizations was an essential part of their philanthropy. As both men had reached a point in their lives where they had learned to live with the disease, their philanthropy was a way to give back and support others, much as they had first been supported when they were diagnosed. This theme has not been explored in much of the LGBT giving literature, and it would be valuable to conduct a study that specifically focused on how the experiences of HIV/AIDS among gay and bisexual men, as well as lesbians who were involved in responding to the crisis, shaped and influenced their philanthropy. Like the community support motivation above, giving for loss and giving back as it relates to HIV/AIDS was another example of social identification theory in action.

Fourth, there were indications in the LGBT giving literature that same-sex couples might use their philanthropy to assert their LGBT identity and presence in mainstream society. This was a sophisticated way some donors used a reputational mechanism for giving, which donors typically use to attain social recognition and approval, into a further statement of LGBT acceptance and visibility beyond themselves. In this way, a segment of the study participants intentionally leveraged their philanthropy to bring recognition to not only their personal philanthropic contributions, but as visible same-sex couples who were supporting mainstream institutions. Incidentally, all the participants who discussed this approach were male, and this finding is one of the study's gender differences, which are detailed below.

Finally, LGBT donors recognized that their identity also influenced to whom they would not give: organizations that either were perceived as discriminatory or practiced discrimination against LGBT individuals. In this way, social identification theory applies less to the relationship between the potential donor and the recipient, and more between the potential donor and the group that is being excluded or discriminated against. Thus, the decision not to give is an act of solidarity, self-preservation, or protest. Participants expressed that they could not support an organization with a discriminatory policy or practice because, as David said, “I’m gay, I mean, I can’t do that to myself.” This sentiment could also be an example of the values mechanism of not wanting to support someone who wouldn’t support the donor, and of psychological benefits, in that in contributing to such organizations individuals were doing a disserve to themselves. I return to this discussion of identity in the theoretical implications.

Household Financial Management and Charitable Decision-Making

The household financial management arrangements of same-sex couples show marked differences from their different-sex counterparts in terms of access to individual money. First, the preference for joint pooling that continues to exist in different-sex couples was the least common financial arrangement among the same-sex couple study participants, supporting prior research (Burns et al., 2008). Instead, nine study couples practiced independent control over finances, and five practiced partial pooling of joint expenses, while retaining a portion of income for individual management. As a result, the same-sex couples in this study had more household financial accounts to manage and more individual control over their money.

These arrangements signal important differences in both power and conflict over money among couples. As the literature on different-sex couples focuses on economic clout within marriage, connecting such power to the person with higher education and income earnings, it is important to understand how this power dynamic changes when money is individually managed. Individual management results in more power sharing—both in completely independent situations, as well as partial pooling. In both arrangements, couples must determine how to share common expenses, either choosing which bills each person will pay, or combining a specified amount into the joint account to cover shared expenses. There are two further opportunities for equality here: couples can choose to pay equal portions of the expenses, or where earned incomes are markedly different, could contribute to shared expenses in a proportional way relative to each person's earnings.

Further, when same-sex couples did practice joint management, conflict over money management was quite low. In fact, some couples had chosen this approach as a form of equity in money management when one person either did not earn income or was underemployed; in this case a joint account signaled to the lower-income earner that the money was his or hers too, and not just that of the primary income earner. Further, access to that money was shared, and no couple engaged in a practice where one person controlled the money on behalf of the other.

The idea of "shared money" carried over to the couples who practiced independent management too. Couples like Mark and Ricardo, John and Tony, and Jackie and Brenna practiced independent management, but viewed money as jointly-held. This paradox was not something discussed in the literature, but can be explained by Kirchler's (1995) love principle, where a harmonious relationship governs partnership interaction and couples will seek to maximize or optimize the mutual good for one another instead of seeing decisions as a cost/benefit proposition. This finding also stands in contrast to the very practical decision some couples made to keep their finances separate in case they were to end their relationship prior to same-sex marriage becoming legal. Even when couples considered this "worst-case scenario" for their relationship, it resulted in a decision that would be equitable, fair, and responsible to one another, again, characteristics implied by the love model.

While beyond the scope of this study, it would be interesting to consider how the lack of prescribed gender roles influenced same-sex couples' financial management patterns. Where prior research found husbands often managing finances directly or doling out an allowance to the wife, neither of these practices was reported by couples in this study. Instead, regardless of the financial arrangements the same-sex couples practiced, the systems of managements seemed mutually agreed upon and had not changed significantly over time. When couples' spending began to exceed their monthly income, couples agreed to either add more money to the common pot, or to jointly spend a little less until the month had ended. In short, same-sex couples approached their financial management as something that was shared, agreed upon, and had little day-to-day conflict regardless of management approach.

Charitable Decision-Making. Although rarely discussed in either the household management or charitable literature, some authors have framed charitable giving as an example of a household spending decision (Burgoyne et al., 2005). As referenced earlier, the majority of quantitative survey research assumes that a household's charitable giving is a unitary household decision, reflecting both individuals' preferences. This includes key studies like the Independent Sector and the Philanthropy Panel Study. Thus, this study sought to understand how charitable decisions were made within same-sex households with the larger context of household financial arrangements in mind.

As this study showed, charitable giving can be initiated by either member of the couple and does not neatly represent either joint or individual decision-making. In the case of independent management, charitable giving decisions can be discussed together, particularly if interests are overlapping but can happen individually as well. At times, one individual in the same-sex couple will make the gift from an individual account but will add his/her partner's name to the gift for recognition purposes, often in the context of workplace giving, either supporting a nonprofit employer, or through a workplace United Way or other giving campaign. A second finding was that the individual who was closest to the organization (i.e. a volunteer, board member, former client) was most likely to initiate the gift.

A similar pattern appeared for couples who practiced partial pooling, although this management system presented a third account from which to make charitable gifts. Kathy said that sometimes she and Martha chose the account they gave from simply based on how much money was in each one. Other couples frequently made gifts from their joint accounts when the support was more akin to an entertainment expense, like tickets for a black-tie gala, subscriptions to theater or music performances, or even dinners where a portion of the proceeds was being donated to a nonprofit organization. Gifts given in honor or in memory of a friend or family member also typically came from joint accounts.

Among couples who only had joint accounts, bargaining was not a given. Even if one person had a stronger connection to a particular organization, the other partner was generally supportive of making the charitable gift. Ryan described giving to his husband's hospital as a "two-minute conversation." Tina had no issue with Cheryl making gifts from their account to Planned Parenthood, even though she would not have made those gifts herself. This was termed "agreement over giving," which reflected shared interests and values, even if that meant supporting different organizations, like one another's alma maters, or organizations each person's friends were involved in. Only one couple, William and Carl, expressed clear disagreement over supporting particular organizations, although they had come to an understanding of each other's values that they respected and thus were comfortable with one another making individual gifts to organizations that the other might not support.

Thus, this study demonstrates the complexity of answering the question, "How do couples make giving decisions?" Researchers need to consider whether the question is answered by the account money comes from, whether a conversation among the couple took place, and how the role of organizational affiliation may mean that one person in the couple takes a lead role in making the gift. Second, as the above discussion shows, the answer to this question can vary from gift to gift, meaning summary questions about charitable decision-making may obscure the actual practices that couples engage in. Few, if any, of the couples in this study consistently made charitable gifts as either joint or independent decisions.

Third, due to this complexity, it was difficult to determine whether the household decision-making arrangement had a sustained effect on the amount given to charity. In many of the couples interviewed, there tended to be one member of the couple who initiated more charitable giving. In this case, there was sometimes potential for negotiation of the gift amount. Because the nature of this study was focused more on meanings and experiences, the amount of giving was not tracked as closely. Still, it was clear that among some couples, one person could encourage the other to give more after discussing the rationale for making a larger gift.

Large versus small donations. Along similar lines, Burgoyne et al. (2005) found that larger donations were more likely to be decided jointly, while incidental donations were more individual decisions. This study asked participants to discuss both large and small donations and assign dollar values to those gifts. Depending on the couple, large gifts usually began at $500 or $1,000. These gifts were almost always discussed, at least minimally, but were not necessarily made from joint accounts. William and Carl, who both served on the board of the same organization, each made a $1,000 gift to the organization annually. But for other organizations where only one person served as a board member, that individual might make an equal or even larger gift without much discussion with the other person. One area that had more consistent joint decision making over giving was support to a church or religious organization. Even though some couples continued to make separate gifts to the same church, this was one type of organization several couples recounted as having a discussion about prior to making a gift.

In contrast, making a small gift, whether that was $10, $25, $100, or even $500 as defined by individual participants, was more likely to happen without much discussion. These gifts were typically thought of as small expenses that were analogous to a dinner out or a trip to Target, spending that very few couples tracked closely. Having access to personal money through independent accounts certainly made making small gifts easier, but couples who had only one joint account participated in giving small gifts too without much, if any, discussion.

Differences between Male and Female Same-Sex Couples

One of the questions generated by the literature on charitable giving was whether male and female same-sex couples would participate in philanthropy differently based on differences in gender. Research has shown that women are more likely to give than similarly situated men, that women often give more, and that women express different preferences in the types of organizations to which they give (Andreoni et al, 2003; Mesch, 2010). While these differences can potentially explain why conflict and bargaining exist among different-sex couples, these differences could be amplified among same-sex couples.

It is important to recognize that a qualitative study such as this is not ideally suited to answer this question, since the representation of 10 male couples and nine female couples is small. However, through the participants' philanthropic experiences, along with the meanings they attribute to them, there are five gender differences that stand out and could be tested in a larger, more representative sample.

1. *Number of organizations supported*. In analyzing where each couple made their gifts, in line with prior research, female same-sex couples were more apt to spread their giving out and give to more organizations than male couples (Andreoni et al, 2003; Mesch, 2010). While couples in the study gave on average to 11 different organizations, female couples supported an average of 12.5 organizations compared to male couples' average of nine organizations. Researchers explain that this could be attributed to men's desire to be more strategic in their giving, while women are more egalitarian, tending to spread their giving out (Brown, 2005). Certainly among individual couples, this explanation was true. However, this study also shows that some same-sex female

couples were strategic givers and used their philanthropy to wield influence and create change.

2. *Types of organizations supported*. Andreoni et al. (2003) also found that women are more likely than their male counterparts to support just about every charitable subsector . In this study, a few key subsector differences stood out. More female same-sex couples than male couples supported religion (5 vs. 3); education (8 vs. 4); animal welfare (6 vs. 3); and the environment (3 vs. 1). Giving was more similar among human services, health, public-societal benefit, and 501(c)(4) organizations. Male couples had a slight edge on giving to arts and culture organizations (8 vs. 6) overall, and within their giving to arts organizations, the male couples also tended to support a greater total number of arts organizations than women did. Again, these results should be interpreted with caution, but they provide some indication that gender differences in giving persist among same-sex couples.

3. *Support for HIV/AIDS organizations*. As the chapter on the role of identity revealed, gay men were much more likely to support HIV/AIDS service organizations as both donors and volunteers. No women in this study described a volunteer experience with an HIV/AIDS organization, nor were any of the women donors in the past year. As Gallo (2001) indicated in her research, one consequence of the AIDS crisis was to strengthen the capacity of AIDS service organizations along with those organizations run by gay men. It appears the awareness and support of HIV/AIDS organizations continues to be dominated by gay men, several of whom identified as HIV-positive and/or had extensive and personal first-hand experiences as a result of the AIDS crisis. It will be interesting to see if this support is generational in nature, as participants like Michael

indicated that the urgency of HIV/AIDS philanthropy has subsided in the past decade as the disease appears to be more "controlled." This finding could have particular implications for the viability of AIDS service organizations whose traditional donor base is aging, especially if younger, gay men do not become involved. It may also speak to the need for these organizations to diversify their philanthropic support to include a wider range of donors.

4. *Role of recognition*. Consistent with the finding that men are more motivated to give based on social recognition and the personal benefits of giving (Brunel & Nelson, 2000; Kottasz, 2004), more male couples in this study than female couples cited the role of public recognition both as a motivation for giving and as an expression of their sexual orientation identity as being part of the mainstream, as described above.

5. *Support for social justice*. While mentioned by only a few female couples, the notion of social justice as part of one's philanthropy stood out as going beyond support for the LGBT community and extending to other marginalized groups. Three couples, all comprised of white women, discussed philanthropic engagement that included racial justice and anti-racism work. Another participant, Jessie, talked about environmental justice. These examples of philanthropic participation speak to the intertwined nature of identity and discrimination, which motivated a progressive political agenda that expanded to people who were different from the women themselves.

Theoretical Implications

The eight mechanisms of charitable giving as well as social identification theory provided theoretical frameworks that illuminated this study, but neither theory provides for an understanding of the charitable giving and decision-making process, a multi-dimensional process that includes criteria such as financial ability, interests, linkages, motivations, identity, and decision-making. Using a constructivist approach to grounded theory, I present a theoretical process for charitable decision-making among same-sex couples from the donor's perspective (Figure 3). This process emerged from the study participants' meanings and experience in making charitable gifts, their motivations and barriers to giving, and the role of household financial management and decision-making.

As the figure shows, before a gift can even be considered, resources, whether money, time, or physical items, must be available. Among the three couples who made less than $100,000 annually, each had expressed feelings of financial constraint that had limited their giving at some point in time. Therefore, even among a high-income study sample, we are reminded that resources such as money and time can be limited. At the same time, values around giving, which appears below as a motivation, can also help prioritize resources so that philanthropic engagement can occur. While the resource question appears first in the model, I acknowledge that it can be influenced by the other factors that surround it.

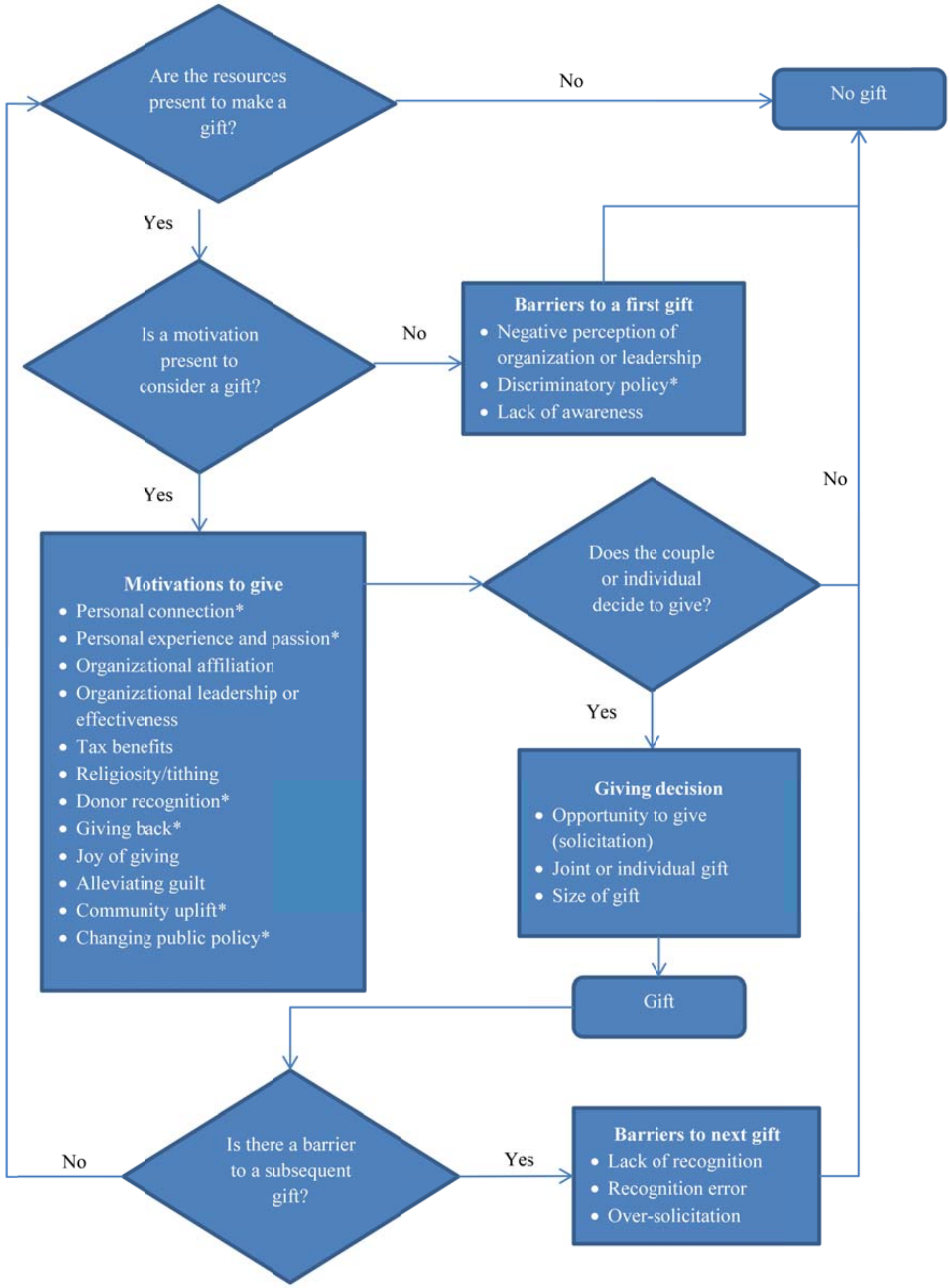
Second, the study participants then considered a motivation to induce philanthropy, in essence a criterion that inspired action. This ranged from tangible, personal contact with nonprofit organizations to psychological feelings of joy and guilt, to long-established beliefs in faith that not only motivated but required action. Two of these motivations appeared as unique themes among same-sex couples' giving that related directly to identity-specific philanthropy: community uplift and changing public policy. At times, other motivations may have been driven by one's sexual orientation, like giving back or donor recognition, though these motivations could have been shaped by other factors as well.

Even as motivational factors are influencing a couple's decision to give, there may be barriers to giving as well, de motivators, in fact. Participants' experiences represented three main categories: negative perceptions of the organization and/or its leadership, an organization with discriminatory policies or practices (perceived or real), or an overall lack of awareness of what organizations exist and/or do relative to a particular cause. The discriminatory policy or practice was identified as specifically related to sexual orientation identity, while the other two barriers were more general in nature.

Before making a giving decision, couples had to have the opportunity to make a gift, whether passively through a letter or e-mail, actively through a face-to-face solicitation, or even proactively on the part of the couple where they sought out the organization rather than being on the "receiving end" of a solicitation. Next, participants needed to consider whether the gift would be made individually or as a couple. While some participants did not recall ever thinking about including their partner on a particular gift, even this was part of the decision. For other couples, making a gift together was something that was discussed and planned for in advance. This is also the point in the decision-making process where the size of the gift would be determined. At times, larger gifts warranted more discussion, but this pattern was also uneven. Only when these criteria around the giving decision were satisfied would a gift be made.

Finally, after participants had become donors to an organization, there was a second round of decision-making that occurred and informed whether a future gift would be considered. Participants who did not feel adequately thanked for a gift, for example, if they never received an acknowledgment letter in the mail, often decided to stop giving to that organization. Two other criteria put a second gift in jeopardy: a recognition error, such as incorrectly addressed mail, especially when a same-sex couple received something addressed to Mr. and Mrs.; and, continued requests to give that donors deemed excessive. All three of these processes are driven by the recipient organizations, suggesting that nonprofits should not take these potential de motivators for granted. Participants recalled such experiences quickly and made future giving decisions based on them.

Figure 3: Same-Sex Couples' Process for Charitable Decision-Making



**Denotes motivations or barriers where sexual orientation identity figured in most prominently*

Implications for Future Research

The role of identity in philanthropic engagement is an important factor in understanding what issues a donor may identify with and how being part of a marginalized group may influence unique motivations for or barriers to giving. Understanding the role of household financial management and its impact on charitable giving revealed new information on where charitable gifts originate and how couples make giving decisions. Relatedly, by detailing the process of charitable giving and proposing how motivations, identity, and decision-making form a process for giving, we are able to think about the philanthropic experience in new ways. These initial understandings, which are tentative because they are grounded in the particular context of the meanings and experiences of a small number of same-sex couples, suggest a number of possibilities for future research on both LGBT giving and philanthropy at-large. These recommendations are detailed as follows:

1. Using the findings from this qualitative research study, develop a quantitative survey instrument to capture the giving experiences of a generalizable sample of LGBT donors, including both single individuals and couples. A large-scale, nationally representative survey of LGBT giving has not been attempted in nearly 20 years (e.g. Badgett and Cunningham, 1998), and much has changed over that time. Further, developing the survey to align with broader surveys such as the Philanthropy Panel Study will allow researchers to make meaningful comparisons between the general population and the giving practices of LGBT people. Not only can this current study inform the survey design, but it highlights potential lines of analysis, such as giving differences by subsector and gender differences between men and women who identify as LGBT.

2. Because this study's participants were all partnered couples, focusing a study on lesbian and bisexual women or gay and bisexual men as individuals could provide more detailed analysis around certain findings. For example, exploring gay and bisexual men's experiences with philanthropy and HIV/AIDS organizations could provide a more nuanced understanding of how the AIDS crisis informed and shaped men's subsequent philanthropy. Being able to understand how their philanthropy has changed over time, as well as how younger generations of gay and bisexual men view this area of work, could yield important findings for HIV/AIDS service organizations. Similarly, focusing a study on philanthropy and social justice, among either just lesbian and bisexual women, or all women, could provide a deeper examination of the intersectional aspects of identity and the way a personal experience of marginalization could cause a person to identify with other marginalized groups who have experienced discrimination, such as racial and ethnic minorities and people who are poor or homeless. Future research should also consider the philanthropic motivations of gay and bisexual men of color as well as transgender individuals to understand how their experiences and intersectional identities influence their connection to other marginalized groups. This research could offer a new development on Schervish and Haven's (2002) social identification theory based upon identity characteristics.

3. The findings on household financial management and charitable decision-making in the present study make a case for adding questions to our current surveys on charitable giving. Instead of assuming that couples equally share household resources, asking how households manage finances may provide new insights into how charitable decisions are made. In particular, it is important to understand whether members of

couples have the capacity to make individual gifts on their own (through individual accounts) versus being able to make gifts only from a joint account and thus having to, presumably, agree on giving. Additional research on types of financial management could also confirm what kinds of gifts are more likely to be made from joint versus individual resources.

4. To further understand the couples' dynamic and the interrelated process for giving, replicate this study's qualitative methodology with a sample of different-sex couples. Such a study would further highlight the role of marginalized identity and would provide important understanding for how same-sex couples manage charitable decision making in unique ways. Using a similar approach with different-sex couples, Einolf, Brown, and Darville (2016) show that married different-sex couples are more likely than same-sex couples to manage finances together and make charitable decisions both jointly and separately, with larger gifts more likely being joint decisions. Similar to this study's findings, they find that the majority of different-sex couples engaged in cooperative bargaining and exhibited agreement over giving. However, their research focuses only on the decision-making process and does not explore questions about identity and motivation, which would allow for other points of comparison.

Recommendations for Practice

In addition to presenting implications for future research, this study has a number of implications for nonprofit organizations and fundraisers who either already work with LGBT donors or who wish to increase donor support from the LGBT community, whether directed to either LGBT and non-LGBT causes.

1. *Recognize the multiple identities LGBT individuals hold.* Identifying as lesbian, gay, bisexual, or transgender may be an important aspect of someone's identity

and rarely can be ignored; however, we all hold multiple identities that are likely related to our philanthropic interests. At the same time that LGBT identity is important, it may be equally or even more important for a lesbian to support feminist causes, a gay Latino man to support the local Hispanic community, or a same-sex couple to support their alma maters.

2. *Include sexual orientation and gender identity in an organization's nondiscrimination policies.* As participants explained, even a perception of discrimination was enough to turn potential LGBT donors away from supporting an organization.

3. Engage in active outreach to the LGBT community and let the community know their involvement and participation is welcome. This could include having LGBT-specific programming, establishing affinity groups, celebrating Gay Pride month in June, or aligning an organization with movements for LGBT equality. It also means highlighting the efforts of LGBT donors and volunteers in newsletters and other publications, as this study showed that idea of building visibility for the LGBT community within non-LGBT organizations can be highly motivating.

4. Ensure that acknowledgement and recognition processes are appropriate for same-sex couples in addition to transgender individuals. As this study showed, recognition errors and a lack of recognition for a gift that was made were both reasons donors stopped giving or considered stopping their support for an organization. Importantly, recognition processes need to ensure that same-sex couples and transgender individuals are recognized according to their wishes, as leaving a partner off of a letter or referring to a donor by Mr. instead of Ms. can make it incredibly difficulty to salvage the relationship. It is particularly important to note such preferences in donor database systems, as development officers may change, and a reliance on manual edits can often lead to unintentional mistakes.

5. Make planned giving part of the conversation with LGBT donors. While six couples in this study had already made planned gifts in their wills or through their retirement accounts, several more couples expressed interest in estate giving. Organizations can take advantage of the opportunity that planned giving offers for both the donor and the recipient, and same-sex couples, particularly those without children, are ideal candidates to cultivate for such gifts.

Finally, there are two implications from this study for nonprofit organizations that work with donors of all types.

6. Understand how donors want to be communicated with and asked for their support. This is true for donors of all types. Organizations need to ask themselves, are we soliciting donors too frequently? Are we thanking them enough? The findings of this study are a good reinforcement of the best practice of asking donors how and how often they want to hear from the organizations they support.

7. Demonstrate results, effectiveness, and institutional stability. This research showed that LGBT donors are highly motivated by impact and organizational effectiveness, as is increasingly seen with donors of all types. Like all donors, LGBT donors want to know that organizations are well run and that gifts are used for the purpose for which they are intended. Maintaining high-quality stewardship practices will enhance donor loyalty and may be essential for securing planned gifts.

Closing Comments

This study highlights the philanthropic experiences of one group of people, same-sex couples in the Midwestern United States, to challenge the tacit assumption that all couples' charitable giving looks the same. While this study confirms a number of giving motivations that apply to donors of all types, it also highlights the unique experiences of same-sex couples and the identity-based motivations that shape some of their giving. As recounted by several participants in this study, their sexual orientation was only one aspect of who they are; however, for many donors, this aspect of their identities specifically motivated support for community uplift, for public policy and advocacy initiatives, and for HIV/AIDS organizations; it made some more interested in public donor recognition as same-sex couples supporting mainstream organizations; and it told potential donors what organizations they would not give to or support in other ways. Participants were highly involved in philanthropy and found great meaning in their participation, especially around board service, direct assistance to individuals in need, and for the organizations where they had personal experiences or passion for the mission.

The research presented here also challenges the notion that a majority of LGBT donors' support is directed to LGBT causes. While one couple did direct the majority of their philanthropy to LGBT causes, that was the exception rather than the rule. Instead, this study shows the complex, multi-faceted identities that shape same-sex couples' lives and their decisions, including the choices they make about the wide variety of causes they support. As Ruth said in describing why she supported a wide variety of organizations, including many non-LGBT causes, "My identity is much bigger than my sexual orientation. It's much wider. There are so many elements to my identity in addition to my sexual orientation that I find myself sharing my resources with many of those elements."

When identity, motivations, and charitable decision-making were examined together, a potential process emerged that explained how charitable giving decisions took place. This theory, grounded in the meanings participants' shared, provides new insight for researchers who want to understand the complexity underpinning the philanthropic process. It also provides practitioners, such as fundraisers, a new way to understand donor behavior and how they can work to create a culture of philanthropy that inclusive of all.

APPENDIX A: Interview Guide

Understanding Same-Sex Couples' Charitable Giving
Study by Elizabeth J. Dale, Indiana University Lilly Family School of Philanthropy, 2015

PRE-SCREENING INTERVIEW PROTOCOL

The interview process will begin when a potential participant contacts me about the study by telephone or email. After making a brief introduction, I will conduct a screening interview to establish that the potential participant meets the study's eligibility requirements. If eligible, I will schedule the interview.

1. Introduction
How did you learn about the study? As indicated in the recruitment materials, I am looking for same-sex couples who are willing to discuss their charitable giving. If you fit this description, I would like to talk to you about your experiences as a donor and how you make charitable decisions. Your participation would involve meeting with me for a one-on-one private interview where I would ask you and your partner about your charitable giving. I will be audio recording interviews for my own information, and no one else will hear them. I will use these recordings to type a transcript of the interview. Nothing that could identify you will be included in what I type. Everything you share with me will be kept very strictly private and confidential and I will not use your name on anything. Does this sound like something that you might be interested in participating in?

2. Prescreening Questions
Okay. I need to ask you a couple of questions to determine whether you are eligible to participate in this study. Do you have any questions for me before we proceed? All right.

Screening Interview Questions	**Participant must answer the following for eligibility**
1. Are you age 21 or over?	1. Yes
2. How do you identify your sexual orientation (i.e. gay, lesbian, bisexual, queer)?	2. A specific term that is not heterosexual or straight.
3. Are you presently in a same-sex relationship?	3. Yes
4. How long have you been in that relationship?	4. At least one year or more.
5. Do you and your significant other reside at the same address?	5. Yes

6. Are you willing to discuss your charitable giving together with your significant other and the researcher?	6. Yes

3. Schedule Interview

Wonderful! You are eligible for the study [If not eligible: Thank you for your interest in this study. Unfortunately, you are not eligible to participate at this time. I hope that you will consider participating in other studies in the future and appreciate your interest in this research.]. Can we schedule an interview? I could reserve a private room on the IUPUI campus, I could come to your home, or we could meet at your office or place of work. Where would be most convenient for you? When would be a good time for you? In advance of the interview, it might be helpful to compose a list of you and your significant other's charitable donations from the past year to provide a starting point for our discussion. Also, if it is all right with you, I will give you a reminder call (or send you a reminder e-mail) the day before the interview.

Understanding Same-Sex Couples' Charitable Giving
Study by Elizabeth J. Dale, Indiana University Lilly Family School of Philanthropy, 2015

Qualitative Interview Guide

Introduction: Thank you for taking the time to talk to me today. I really appreciate your willingness to help me out with this interview. Have you ever been interviewed before? Well, the main reason why I would like to interview you is to learn about your experiences with charitable giving. I am interested in your experiences giving to charity and learning how those decisions are made.

Findings from this study will be used to understand how different people make charitable decisions and may help nonprofit organizations.

Interviewee Role: I want you to feel that this is *your* interview. I am here to listen to what you have to say. I am very interested in your experiences and feelings, so please feel free to share anything that comes to mind. My job is to listen to you so that I can better understand these experiences.

Explain Audio Recording Procedures: As I explained when we talked on the phone, I will record our conversation so that I do not have to take notes and so I can get your complete answers. This also helps me guarantee that my report will accurately reflect your experiences. After the interview, I will listen to the recording and type up the interview. I will not include your name or any other unique information that identifies you or your family. When I have finished my project, the recorded copy of the interview will be erased. Is this all okay with you?

Assure Interviewee of Confidentiality: Please feel free to speak openly with me. Maintaining your privacy is the most important thing to me and anything you say during this interview will be kept private and confidential. I will not include your name or any other unique information that could identify you in my report. Also, if I ask you any questions that you do not want to answer, you can just say, "pass" and we will skip those questions.

Time Frame of Interview: The interview will last about an hour. If you need a break at any time, just let me know.

Obtain Informed Consent: Before we begin the interview, I would like to go over the study's information sheet, which describes the nature of the study, your role in the study, the steps taken to maintain your confidentiality, and the voluntary nature of the study. You can take this form with you (Wait for the participant to read the information). Do you have any questions about the study or the information you read? If not, do you give your permission to participate in the study by being interviewed? (If the participant agrees, then start the interview). Ok thank you for your help with the study. Do you have any more questions before we start?

Gain Verbal Consent and Start Interview: Ok, then I will begin recording the interview now.

Start recorder and record verbal consent prior to asking any interview questions: "We are now recording. Today is [date] 2015. My name is Elizabeth Dale. I am a graduate student at Indiana University Purdue University Indianapolis. I would like to ask your permission to record this interview which I will transcribe myself and to use the recording and the transcription for study and research purposes." If verbal consent is given and audio recorded, proceed with the interview.

Questions: Let's begin with some background questions so that I can get to know more about you before we talk about your experiences. I already asked you some of these questions when I spoke to you on the phone about your eligibility, but I need to ask them again to make sure that I record your answers for the study. I will use the answers to these questions for an overall description of who participated in the study.

I. Background Questions:
I'd like to start by talking a little about your relationship and your household.

How long have you been a couple?

How long have you lived together?

How would you define the status of your relationship? (For example, in a legal marriage, in a civil union, in a domestic partnership, or in a committed relationship.) If married, when did you get married?
Had either of you been married before?

Do you have any children? If yes, do they live with you now? How old are they?

In describing your sexual orientation, how would you identify yourselves?

Are you currently employed? If yes, how would you describe your occupation? Would you say you work full-time or part-time?

About how much did you earn in income last year (each person)? If you don't want to provide a specific amount, would you say it was less than $35,000, between $35,000 and $49,999; between $50,000 and $74,999; between $75,000 and $99,999; or $100,000 or more?

What is the highest level of education that you have completed?

Do you consider yourselves religiously affiliated? If so, what religion and/or denomination do you consider yourself? How frequently do you attend services?

And finally, what is your age?

II. Giving and volunteering
Okay, during the rest of the interview I want to focus on three things: your charitable giving, how you make giving decisions, and your experiences as donors. Charitable organizations include religious or non-profit organizations that help those in need or that serve and support the public interests. You might have prepared a list of your recent charitable giving in advance of our interview.

Let's start by talking about a recent gift you made.

- What did you give? How much?

- What prompted your donation?
- How did you decide how much to give?
- How are you giving? Through the mail, at events, online?
- Whose idea was it originally to give to that organization?
- What influenced your decision?
- [Repeat as needed for additional gifts.]

Would you say you have an overall philosophy or approach when it comes to giving?

Do you every give something other than money (i.e. in-kind gifts, volunteer time)?

Do you tend to support the same organizations year after year or different ones?

How, if at all, are you connected to the organization(s) you support other than by being a donor?

Can you describe how you make charitable decisions?
- What role does your partner's opinion play in deciding who to give to?
- Do you ever disagree? Can you elaborate?
- How do you handle disagreement?
- In what circumstances would you make giving decisions alone?
- Where does the money come from?
- How much of your giving is planned or budgeted in advance versus spontaneous?
- How does your charitable giving reflect other financial decisions in your household?
- What do you consider a large gift? A small gift?

Think about the largest gift you have ever made while together as a couple. How did you make that gift?

How do you handle your money as a couple?
- Do you have joint bank accounts, separate accounts, or some combination of the two?
- Joint credit cards?
- Who pays the bills? Who does the taxes each year?
- Do you work out a budget and try to stick with it?
- How do you make decisions about purchases?
- Which types of purchases does only one person make, and what decisions do you make together?

IV. Giving motivations

What kinds of things do you consider when you are making a gift to charity?
- How do you evaluate an organization?
- What prompts you to make a gift? (i.e. a mailing, e-mail, personal ask)

- Has any particular event or experience in your life shaped your charitable giving?
- Have any family members played any role in your charitable giving?
- Does tax-deductibility matter to you?

Does any aspect of your identity influence who you give to? (For example, your gender, ethnic background or race, sexual orientation, or anything else about who you are?)

I'd like to further explore how, if at all, your sexual orientation has influenced your philanthropic actions.

- Have there been any key moments related to being gay/lesbian that have shaped your giving or volunteering?
- When you first came out, did your giving or volunteering change in any way?
- What about when you became involved in a relationship?
- What causes related to the LGBT community have you felt most drawn to support?

How has your giving changed over time?

Tell me about your most meaningful gift to charity.

- How did that gift affect you personally?
- How has that gift affected you as a couple?

What makes you less likely to give to a particular cause or organization?

- Have you ever stopped giving to an organization?
- Can you describe the circumstances that led to you to stop giving?

V. Closing Question:
Is there anything else that I didn't think to ask that you would like to share about your experiences related to charitable giving?

Thank you:
Thank you! The information you have shared with me has been very helpful. If you have any additional questions or just want to talk about the interview experience, please feel free to give me a call or email me. [After recorder is off, ask participant to recommend additional participants, if needed. Finally, ask the participant which 501(c)3 nonprofit organization they would choose for a donation in appreciation of their time and whether they would like to be recognized or remain anonymous when the gift is made].

APPENDIX B: Study Information Sheet

INDIANA UNIVERSITY STUDY INFORMATION SHEET FOR
Understanding Same-Sex Couples' Charitable Giving (IRB STUDY #1402761476)

You are invited to participate in a research study on the experiences of same-sex couples' charitable giving practices. You were selected as a possible participant because you self-identify as gay, lesbian, bisexual, or queer, and are in a relationship with a same-sex partner for at least one year, and live with your partner at the same address. We ask that you read this form and ask any questions you may have before agreeing to be in the study.

The study is being conducted by Elizabeth J. Dale in the Indiana University Lilly Family School of Philanthropy at Indiana University Purdue University Indianapolis. Dr. Debra Mesch, a faculty member at the Indiana University Lilly Family School of Philanthropy is supervising the project.

This project is not funded.

STUDY PURPOSE
The purpose of this study is to better understand the charitable giving practices of same-sex couples and how those decisions are made within each household.

PROCEDURES FOR THE STUDY
If you agree to be in the study, you will participate in an interview designed to last approximately 45 to 90 minutes. The interview will be recorded on a digital recorder and then transcribed. The interviews will occur in a quiet and private location of your choice (such as a private room on the IUPUI campus, in your home, or at your office). You might have also prepared a list of your charitable donations in advance of the interview to serve as a starting point for our discussion.

CONFIDENTIALITY
Efforts will be made to keep your personal information confidential. We cannot guarantee absolute confidentiality. Your personal information may be disclosed if required by law. Your identity will be held in confidence in reports in which the study may be published. Elizabeth J. Dale and Dr. Debra Mesch will have access to the audio recordings of the interview and they will be stored on a password protected computer and deleted from the voice recorder once transcribed. All recordings will be deleted at the end of this research project.

Organizations that may inspect and/or copy your research records for quality assurance and data analysis include groups such as the study investigator and his/her research associates, the Indiana University Institutional Review Board or its designees, and (as allowed by law) state or federal agencies, specifically the Office for Human Research Protections (OHRP) who may need to access your research records.

PAYMENT
You will not receive payment for taking part in this study. In appreciation of your time, I will make a $25 donation to a nonprofit organization of your choice.

CONTACTS FOR QUESTIONS OR PROBLEMS
For questions about the study, contact the researcher Elizabeth J. Dale, or the project supervisor, Dr. Debra Mesch at (317) 274-8635. For questions about your rights as a research participant or to discuss problems, complaints or concerns about a research study, or to obtain information, or offer input, contact the IU Human Subjects Office at (317) 278-3458 or [for Indianapolis] or (812) 856-4242 [for Bloomington] or (800) 696-2949.

VOLUNTARY NATURE OF STUDY
Taking part in this study is voluntary. You may choose not to take part or may leave the study at any time. Leaving the study will not result in any penalty or loss of benefits to which you are entitled. Your decision whether or not to participate in this study will not affect your current or future relations with Indiana University-Purdue University Indianapolis.

APPENDIX C: Recruitment Emails

Sent to Help Recruit Participants:

Dear _______________,

My name is Elizabeth Dale and I am a graduate student at the Indiana University Lilly Family School of Philanthropy. I am working on a research project about same-sex couple's philanthropy (IRB Study #1402761476). I am interested in learning about couples' charitable giving experiences and how they make those decisions. Currently, there is very little research about LGBTQ individuals with respect to philanthropy and this project seeks to add to our understanding through the telling of individual couples' stories.

To participate, couples should be willing to meet with me one-on-one for an interview designed to last about an hour. Couples should have been together for at least one year and currently reside together. During our initial conversation, I will ask a few brief questions to confirm they are eligible to participate.

Do you know any couples who would meet these criteria and who might want to participate? If you do, please feel free to share this email, asking them to contact me by email at ejdale@iupui.edu.

I also am attaching a flyer with more information about the study that you could forward to anyone you think that might be interested.

Sincerely,
Elizabeth Dale

Sent to Possible Participants Who Contact Me About the Study:

Dear ________________,

Thank you for your interest in the study. My name is Elizabeth Dale and I am a graduate student at the Indiana University Lilly Family School of Philanthropy. I am working on a research project about same-sex couple's philanthropy (IRB Study #1402761476).

I would welcome the opportunity to meet with you and your significant other for a conversation about your experiences. Your participation would involve meeting with me for a one-on-one private interview designed to last about one hour where I would ask about your charitable giving. While couples do not need to be married, I am looking to interview couples who have lived together for at least one year. I would like to interview you and your partner/spouse together. All interviews will be kept strictly private and confidential and I will not use your name on anything. Interviews can be scheduled at your convenience between now and June 30, 2015. Prior to scheduling the interview, I will conduct a brief interview over the phone to confirm that you are eligible to participate.

If you are interested in participating or have additional questions about the study, please let me know. You can contact me by email at ejdale@iupui.edu.

Sincerely,
Elizabeth Dale

APPENDIX D: Participant Profiles

	Name	Age	Gender	Sexual Orientation	Employment Status	Religious?	Children?	Relationship Length (Years)	Legally Married?	Financial System
1	Kevin	51	M	Gay	FT	N	N	13	Y	Independent
	Michael	50	M	Gay	FT	N	N			
2	Patrick	34	M	Gay	FT	N	N	8	N	Independent
	David	51	M	Gay	FT	N	N			
3	Ruth	60	F	Lesbian	FT	Y	N	20	Y	Independent
	Evelyn	62	F	Lesbian	FT	Y	N			
4	Martha	53	F	Lesbian	FT	N	Y, 3*	6	N	Partial pooling
	Kathy	54	F	Lesbian	FT	N	N			
5	John	49	M	Gay	FT	N	N	22	Y	Independent
	Tony	55	M	Gay	FT	N	N			
6	Victor	41	M	Gay	FT	N	Y, 2	11	Y	Joint
	Ryan	46	M	Gay	None	N	Y, 2			
7	Anne	38	F	Lesbian/ Bisexual	FT	N	N	5.5	N	Partial pooling
	Jessie	35	F	Lesbian/ Bisexual	PT	N	N			
8	Jerry	58	M	Gay	FT	Y	N	28	Y	Partial pooling
	Paul	56	M	Gay	Disabled	Y	N			
9	Ricardo	54	M	Gay	FT	N	N	22	Y	Independent
	Mark	53	M	Gay	FT	N	N			
10	Jackie	41	F	Gay	FT	Y	N	15	Y	Independent
	Brenna	43	F	Lesbian	FT	Y	N			
11	Beth	32	F	Lesbian	FT	Y	Y, 1	7	Y	Joint
	Melissa	36	F	Lesbian	FT	Y	Y, 1			
12	Carl	59	M	Gay	FT	Y	Y, 2*	7	N	Partial pooling
	William	66	M	Gay	FT	Y	Y, 2*			
13	Jeff	32	M	Gay	FT	Y	N	7	N	Independent
	Peter	37	M	Gay	FT	N	N			
14	Tina	43	F	Gay	FT	N	N	16	N	Joint
	Cheryl	55	F	Gay	PT	N	N			
15	Karen	57	F	Bisexual	FT	Y	Y, 2	8	N	Independent
	Kim	57	F	Lesbian	FT	Y	Y, 2			
16	Heather	32	F	Lesbian	FT	N	Y, 1	7	Y	Independent
	Tiffany	34	F	Lesbian/ Sexual	FT	N	Y, 1			

	Name	Age	Gender	Sexual Orientation	Employment Status	Religious?	Children?	Relationship Length (Years)	Legally Married?	Financial System
17	Robert	51	M	Gay	PT	N	N	17	Y	Joint
	Henry	55	M	Gay	FT	N	Y, 1*			
18	Steven	34	M	Gay	PT	N	Y, 1	9	Y	Partial pooling
	Chris	29	M	Gay	FT	N	Y, 1			
19	Donna	48	F	Lesbian	FT	Y	N	20	Y	Joint
	Carol	64	F	Lesbian	Retired	Y	Y, 1*			

* Adult children not living at home.

REFERENCES

Andreoni, J., Brown, E., & Rischall, I. (2003). Charitable giving by married couples: Who decides and why does it matter? *The Journal of Human Resources*, *38*(1), 111-133.

Andreoni, J., & Vesterlund L. (2001). Which is the fair sex? Gender differences in altruism. *The Quarterly Journal of Economics, 116*(1), 293-312.

Arksey, H. (1996). Collecting data through joint interviews. *Social Research Update*, *15*. Retrieved from http://sru.soc.surrey.ac.uk/SRU15.html

Badgett, M. V. (2001). *Money, myths, and change: The economic lives of lesbians and gay men.* Chicago, IL: University of Chicago Press.

Badgett, M. V. Lee, & Cunningham, N. (1998). *Creating Communities: Giving and Volunteering by Gay, Lesbian, Bisexual, and Transgender People.* New York, NY and Amherst, MA: Working Group on Funding Lesbian and Gay Issues and Institute for Gay and Lesbian Strategic Studies.

Baker, S. E., & Edwards, R. (2012). How many qualitative interviews is enough? Expert voices and early career reflections on sampling and cases in qualitative research. National Centre for Research Methods Review Paper. Retrieved from http://eprints.ncrm.ac.uk/2273/4/how_many_interviews.pdf

Bekkers, R., & Wiepking, P. (2011). A literature review of empirical studies of philanthropy: Eight mechanisms that drive charitable giving. *Nonprofit and Voluntary Sector Quarterly*, *40*(5), 924-973.

Bjornholt, M., & Farstad, G. R. (2014). “Am I rambling?” On the advantages of interviewing couples together. *Qualitative Research, 14*(1), 3-19.

Blumstein, P., & Schwartz, P. (1985). *American couples: Money, work, sex*. New York, NY: William Morrow.

Boy Scouts of America. (2015, July 27). Boy Scouts of America amends adult leadership policy. *The Newsroom Blog*. Retrieved from http://scoutingnewsroom.org/blog/boy-scouts-of-america-amends-adult-leadership-policy/

Brown, E. (2005). Married Couples' Charitable Giving: Who and Why. In M.A. Taylor, & S. Shaw-Hardy (Eds.), *The Transformative Power of Women's Philanthropy*. New Directions for Philanthropic Fundraising (50). (pp.69-80). San Francisco, CA: Wiley Periodicals, Inc.

Brown, E., Mesch, D., Moore, Z., Kou, X., & Kim, S. (2010). Who decides revisited: Household decision making and charitable giving. Presentation at the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA), Alexandria, VA.

Brunel, F. F., & Nelson, M. R. (2000). Explaining gendered responses to "help-self" and "help-others" charity advertising appeals: The mediating role of world-views. *Journal of Advertising, 2*9(3), 15-29.

Bryant, W. K., Slaughter, H. J., Kang, H., & Tax, A. (2003). Participating in philanthropic activities: Donating money and time. *Journal of Consumer Policy, 26*(1), 43-73.

Bureau of Labor Statistics, U.S. Department of Labor. (2014). Nonprofits account for 11.4 million jobs, 10.3 percent of all private sector employment. *The Economics Daily*, Retrieved from http://www.bls.gov/opub/ted/2014/ted_20141021.htm

Burgoyne, C., Clarke, C., Reibstein, J., & Edmunds, A. (2006). All my worldly goods I share with you? Managing money and the transition to heterosexual marriage. *The Sociological Review, 54*, 619-637.

Burgoyne, C., Reibstein, J., Edmunds, A., & Dolman, V. (2007). Money management systems in early marriage: Factors influencing change and stability. *Journal of Economic Psychology*, *28*, 214-228.

Burgoyne, C., Young, B., & Walker, C. (2005). Deciding to give to charity: A focus group study in the context of the household economy. *Journal of Community and Applied Social Psychology, 15,* 383-405.

Burns, M., Burgoyne, C., & Clarke, V. (2008). Financial affairs? Money management in same-sex relationships. *The Journal of Socio-Economics*, *37*, 481-501.

Cabrales, J. A. (2013). An approach to engaging Latina/o alumni in giving initiatives: Madrina y Padrinos. In N. Drezner (Ed.), *Expanding the donor base in higher education: Engaging non-traditional donors* (pp. 26-39). New York: Routledge.

Center for American Progress. (2010). *Gay and transgender youth homelessness by the numbers*. Washington, D.C: Author.

Center on Philanthropy (2007). *Center on Philanthropy Panel Study. Overview of Overall Giving.* Retrieved from http://www.philanthropy.iupui.edu/files/research/2007_copps_key_findings.pdf

Charmaz, K. (2003). Grounded theory. In J. Smith (Ed.), *Qualitative Psychology: A Practical Guide to Research Methods* (pp. 81-110). Thousand Oaks, CA: Sage.

Charmaz, K. (2014). *Constructing grounded theory,* 2nd Edition. Thousand Oaks, CA: Sage.

Christians, C. G. (2000). Ethics and politics in qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp.133-155). Thousand Oaks, CA: Sage.

Creswell, J. W. (2013). *Qualitative inquiry and research design: Choosing among five approaches*, 3rd Edition. Thousand Oaks, CA: Sage.

Davis, K. (2008). Intersectionality as buzzword: A sociology of science perspective on what makes a feminist theory successful. *Feminist Theory, 9*(1), 67-85.

Denzin, N. K., & Lincoln Y.S. (2011). Introduction: The discipline and practice of qualitative research. *The Sage handbook of qualitative research* (4th ed.) (pp.1-19). Thousand Oaks, CA: Sage Publications.

Drezner, N. D. (2013). *Expanding the donor base in higher education: Engaging non-traditional donors*. New York: Routledge.

Edwards, M. (1982). Financial arrangements made by husbands and wives: Findings of a survey. *The Australian and New Zealand Journal of Sociology, 18*(3), 320-338.

Einolf, C. & Brown, E. (forthcoming). Household decision-making, family roles, and charitable giving. Proposal for the Science of Philanthropy Initiative.

Einolf, C. J., Brown, K.C., & Darville, H. K. (2016). How married couples make charitable giving decisions. Manuscript in preparation.

Esterberg, K. G. (2002). *Qualitative Methods in Social Research*. Boston, MA: McGraw Hill.

Flandez, R. (2013, May 19). As wedding bells ring, charities seek support from newly visible same-sex couples. *The Chronicle of Philanthropy*.

Gallo, M. M. (2001). Lesbian giving—and getting: Tending radical roots in an era of venture philanthropy. *Journal of Lesbian Studies, 5*, 63-70.

Garvey, J. C., & Drezner, N. D. (2013a). Advancement staff and alumni advocates: Cultivating LGBTQ alumni by promoting individual and community uplift. *Journal of Diversity in Higher Education, 6*(3), 199-218.

Garvey, J.C., & Drezner, N. D. (2013b). Alumni giving in the LGBTQ communities: Queering philanthropy. In N. Drezner (Ed.), *Expanding the donor base in higher education: Engaging non-traditional donors* (pp. 74-86). New York: Routledge.

Gasman, M., & Bowman, N. (2013). Engaging and soliciting African American alumni. In N. Drezner (Ed.), *Expanding the donor base in higher education: Engaging non-traditional donors* (pp. 15-25). New York: Routledge.

Gates, G. J. (2011). *How many people are lesbian, gay, bisexual, and transgender?* Los Angeles, CA: The Williams Institute, UCLA School of Law.

Gates, G. J. (2013). *Same-sex and different-sex couples in the American Community Survey: 2005-2011*. Los Angeles, CA: The Williams Institute, UCLA School of Law.

Giving USA 2015: The Annual Report on Philanthropy for the Year 2014 (2015). Chicago: Giving USA Foundation.

Guba, E. G., & Lincoln, Y. S. (1994). Competing paradigms in qualitative research. In N. K. Denzin & Y. S. Lincoln (Eds.), *Handbook of qualitative research* (pp.163-194). Thousand Oaks, CA: Sage.

Horizons Foundation. (2008). *Building a new tradition of LGBT philanthropy*. San Francisco, CA: Author.

Independent Sector (2001). *Giving and Volunteering in the United States: Findings from a national survey*. Washington, DC: Author. Retrieved from http://www.cpanda.org/pdfs/gv/GV01Report.pdf

James, III, R. N., (2013). *American charitable bequest demographics (1992-2012).* Retrieved from http://www.encouragegenerosity.com/ACBD.pdf

Kendell, K., & Herring, R. (2001). Funding the National Center for Lesbian Rights. *Journal of Lesbian Studies*, 5(3), 95-103.

Kirchler, E. (1995). Studying economic decisions within private households: A critical review and design for a "couple experiences diary," *Journal of Economic Psychology*, *16*(3), 393–419.

Kottasz, R. (2004). Differences in the donor behavior characteristics of young affluent males and females: Empirical evidence from Britain. *Voluntas: International Journal of Voluntary and Nonprofit Organizations*, *15*(2), 181-203.

Kvale, S. (2007). *Doing Interviews*. Thousand Oaks, CA: Sage.

Lather, P. (1991). *Getting smart: Feminist research and pedagogy with/in the postmodern*. New York: Routledge.

Lorde, A. (1984). Age, race, class, and sex: Women redefining difference. In A. Lorde, *Sister Outsider: Essays and Speeches* (pp.114-121). Berkley, CA: Crossing Press.

Luborsky, M. R., & Rubinstein, R. L. (1995). Sampling in qualitative research: Rationale, Issues, and Methods. *Research on Aging*, *17*(1), 89-113.

Lundberg, S., & Pollak, R. (1993). Separate spheres bargaining and the marriage market. *Journal of Political Economy*, *101*, 988-1010.

Marx, J. D. (2000). Women and human services giving. *Social Work, 45*(1), 27-38.

McElroy, M., & Horney, M. (1981). Nash-bargained household decisions: Toward a generalization of the theory of demand. *International Economic Review*, *22,* 333-349.

McKeever, B. S. (2015). *The nonprofit sector in brief 2015: Public charities, giving, and volunteering.* Washington D.C.: Urban Institute. Retrieved from http://www.urban.org/sites/default/files/alfresco/publication-pdfs/2000497-The-Nonprofit-Sector-in-Brief-2015-Public-Charities-Giving-and-Volunteering.pdf

Merriam, S. B. (2002a). Introduction to qualitative research. In S. B. Merriam & Associates (Eds.), *Qualitative Research in Practice* (pp. 1-17). San Francisco, CA: Jossey-Bass.

Merriam, S. B. (2002b). Assessing and evaluating qualitative research. In S. B. Merriam & Associates (Eds.), *Qualitative Research in Practice* (pp. 18-36). San Francisco, CA: Jossey-Bass.

Mesch, D. (2010). *Women give 2010: New research about women and giving.* Indianapolis, IN: Center on Philanthropy at Indiana University. Retrieved from https://philanthropy.iupui.edu/files/file/women_give_2010_report.pdf

Mesch, D. J. & Pactor, A. (2016). *Women and Philanthropy*. In J. Harrow, T. Jung & S. Phillips (Eds.). *The Routledge Companion to Philanthropy* (pp. 88-102). London, England, Routledge.

Mesch, Debra J., Rooney, P. M., Steinberg, K. S., & Denton, B. (2006). The effect of race, gender and marital status on giving and volunteering in Indiana. *Nonprofit and Voluntary Sector Quarterly*, 35(4), 565-587.

Movement Advancement Project (MAP). (2014). *Understanding Issues Facing LGBT Americans.* Denver, CO: Author. Retrieved from http://www.lgbtmap.org/file/understanding-issues-facing-lgbt-americans.pdf

Movement Advancement Project (MAP) & Services and Advocacy for Gay, Lesbian, Bisexual and Transgender Elders (SAGE). (2010). *Improving the lives of LGBT Older Adults*.

O'Connell, M., & Feliz, S. (2011). Same-sex couple household statistics from the 2012 census. SEHSD Working Paper Number 2011-26. Released September 27, 2011. Retrieved from https://www.census.gov/hhes/samesex/data/decennial.html

Oreffice, S. (2011). Sexual orientation and household decision making: Same-sex couples' balance of power and labor supply choices. *Labour Economics, 18*(2), 145-158.

Pahl, J. (1995). His money, her money: recent research on financial organization in marriage. *Journal of Economic Psychology, 16*, 361-376.

Patton, M. Q. (2002). *Qualitative research and evaluation methods*, 3rd Edition. Thousand Oakes, CA: Sage.

Payton, R. L. & Moody, M. P. (2008). *Understanding philanthropy: Its meaning and mission.* Bloomington, IN: Indiana University Press.

Pew Research Center. (2015, May 12). America's changing religious landscape. Washington DC: Author. Retrieved from http://www.pewforum.org/2015/05/12/americas-changing-religious-landscape/

Pew Research Center. (2015, June 26). *Same-sex marriage, state by state*. Washington, DC: Author. Retrieved from http://www.pewforum.org/2015/06/26/same-sex-marriage-state-by-state/

Romero, A. P., Rosky, C. J., Badgett, M.V. L., & Gates, G. J. (2008). *Census Snapshot: Indiana*. Los Angeles, CA: The Williams Institute, UCLA School of Law.

Rooney, P. (2005, May). Researching from the inside—does it compromise validity? – A discussion. Level 3, Issue 3. Retrieved from http://arrow.dit.ie/cgi/viewcontent.cgi?article=1004&context=ltcart

Rose, S. R. (1998). *A study of lesbian philanthropy: Charitable giving patterns*. (Unpublished master's thesis). University of San Francisco, San Francisco, CA.

Sabin, D., & Morris, J. F. (2001). Enhancing and inspiring lesbian philanthropy. *Journal of Lesbian Studies*, 5(3), 151-159.

Schervish, P. G., & Havens, J. J. (1997). Social participation and charitable giving: A multivariate analysis. *Voluntas, 8*, 3, 235-260.

Schervish, P.G., & Havens, J.J. (2002). The Boston area diary study and the moral citizenship of care. *Voluntas, 13*, 47-71.

Small, M. L. (2009). 'How many cases do I need?': On science and the logic of case selection in field-based research. *Ethnography*, *10*(1), 5-38.

Tobin, G. A., Solomon, J. R., & Karp, A. C. (2003). Mega-gifts in American philanthropy. *San Francisco: Institute for Jewish and Community Research*.

Wagner, L. (2011). Ethnicity and giving. In E. R. Tempel, T. L. Seiler, & E. E. Aldrich (Eds.). *Achieving Excellence in Fundraising* (pp. 183-198). San Francisco, CA: Jossey-Bass.

Wang, L. (2011). Understanding how philanthropy and nonprofit activities manifest in minority communities in the United Sates. In K. A. Agard (Ed.) *Leadership in nonprofit organizations: A reference handbook* (pp. 258-266). Thousand Oaks, CA: Sage.

Wiepking, P., & Bekkers, R. (2010). Does who decides really matter? Causes and consequences of personal financial management in the case of larger and structural charitable donations. *Voluntas, 21,* 240-263.

Wilkinson, S. (2003). Focus groups. In J. Smith (Ed.), *Qualitative Psychology: A Practical Guide to Research Methods* (pp. 184-204). Thousand Oaks, CA: Sage.

Yin, R. (2002). *Case study research*. Thousand Oaks, CA: Sage.

Yörük, B. K. (2010). Charitable giving by married couples revisited. *The Journal of Human Resources, 45*(2), 497-516.

CURRICULUM VITAE

Elizabeth Jane Dale

Education

Ph.D., Indiana University (2016)
Major: Philanthropic Studies
Minor: Women's Studies
- GPA 4.0
- Dissertation: Giving among same-sex couples: The role of identity, motivations, and charitable decision-making in philanthropic engagement
- Advisor: Dr. Debra Mesch

M.A., The Ohio State University (2006)
Major: Women's Studies
- GPA 4.0
- Full scholarship and graduate assistantship

B.A., *summa cum laude*, Ohio Wesleyan University, Delaware (2004)
Majors: Journalism; Women's and Gender Studies
- GPA 3.96
- University Honors
- Phi Beta Kappa
- Study Abroad – London, England through City University

Professional Experience

Assistant Professor, Nonprofit Leadership, Seattle University (2016 – present)
- Research interests: influence of individual identity on philanthropy; gender and philanthropy; advocacy, social change, and grassroots and community organizations; nonprofit studies curriculum and pedagogy

Courses Taught
- NPLR 5370: Boards and Volunteers, Winter 2016
- NPLR 5420: Strategic Marketing for Nonprofit Organizations, Spring 2016
- PUBA 2150: Introduction to the Nonprofit Sector, Fall 2016
- NPLR 5600: Fundraising Leadership, Fall 2016

Additional Teaching Experience

Indiana University—Purdue University Indianapolis (2012-2015)
- PHST 105: Giving and Volunteering in America, Instructor, 2013-2015 (online and traditional format)

- PHST 105: Giving and Volunteering in America, Teaching Assistant, 2012-2013 (hybrid and traditional format)

The Ohio State University (2004-2006)
- WOMS 110: Introduction to Women's Studies in the Social Sciences, Instructor, (2005-2006)
- WOMS 110: Introduction to Women's Studies in the Social Sciences, Teaching Assistant, (2005-2006)

Publications

Refereed Journal Articles

Osili, U., Mesch, D. J., Hayat, A., & Dale, E. J. (2016) The effects of gender, group composition and social trust on the volunteer behavior of Lions Clubs International Members. *Voluntary Sector Review 7*(1), 67-87.

Shaker, G. G., Nathan, S.K., and Dale, E. J. (2014). Sequential online course re-design: When "It just takes time" works no longer. *To Improve the Academy: A Journal of Educational Development*, *33*(2), 220-238.

Book Chapter

Dale, E. J. (2016). Inclusive Philanthropy: Giving in the LGBTQ community. In E. R. Tempel, T. L. Seiler, and D. F. Burlingame (Eds.), *Achieving Excellence in Fundraising*, 4th edition (pp. 127-129). Hoboken, NJ: John Wiley & Sons.

Book Review

Dale, E. J. (2014). Women and the Gift. [Book Review]. *Nonprofit and Voluntary Sector Quarterly*, *43*(6), 1129-1131.

Practitioner Report

Dale, E. J. (2006). Building pay equity from the wage floor up. YWCA Great Lakes Alliance Policy Brief. Columbus, OH.

Manuscript in progress

Dale, E. J. The story behind the gift: The gendered discourse of million-dollar donations. (To be submitted to *Nonprofit and Voluntary Sector Quarterly*)

Presentations and Media

Peer-Reviewed Presentations

Dale, E. J., (2015, November). Philanthropic Decision Making in Gay and Lesbian Households. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) annual meeting. Chicago, IL.

Mesch, D. J., Osili, U., Dale, E. J., & Ackerman, J. (2015, November). Do women give more? Findings from three unique data sets on charitable giving. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) annual meeting. Chicago, IL.

Mesch, D. J., Osili, U., Dale, E. J., & Ackerman, J. (2015, November). Does Charitable Cause Matter? Gender Differences in Motivation and Purpose of Charitable Giving. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) annual meeting. Chicago, IL.

Dale, E. J., Shaker, G. G., Groner A.*, & Schepers, B. E*. (2015, May). Using a multi-level peer-mentoring model to facilitate service-learning leadership among students. International Symposium on Service-Learning, Indianapolis, IN.

Osili, U., Mesch, D. J., Hayat, A., & Dale, E. J. (2014, November). The effects of gender, education, and social trust on the volunteer behavior of Lions Club International members. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) annual meeting. Denver, CO.

Dale, E. J. (2014, July). The story behind the gift: An exploratory study of gender, discourse, and million-dollar donations. International Society for Third-Sector Research (ISTR) conference. Muenster, Germany.

Dale, E. J. (2013, November). Women giving millions: Exploring the landscape and narratives of women's million-dollar gifts. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) annual meeting. Hartford, CT.

Shaker, G. G., Nathan, S. K., & Dale, E. J. (2013, November). Going electronic: Online instruction for college students studying philanthropy. Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) annual meeting. Hartford, CT.

Invited Presentations

Dale, E. J. (2014, March). *Benevolence, Self-Help and Moral Reform: Philanthropy and Power in Women's Voluntary Associations*, for Perspectives of Philanthropy, Franklin College.

Shaker, G.G., & Dale, E. J. (2013, April). *The Creative Online Integrative Learning Environment*, Plater Institute on the Future of Learning, Integrative Learning: Translating Theory into Practice, IUPUI.

Dale, E. J. (2012, November). *Gender and Sport*, for Women's Studies 105: Introduction to Women's Studies, IUPUI.

Dale, E. J. (2006, June). *Networking Skills and Practice*, Young Women's Leadership Institute, YWCA Great Lakes Alliance. Madison, Wisconsin.

New Media

Dale, E. J. (2016) Title forthcoming, documentary on American Philanthropy, (documentary film participant) CAPA TV (France)

Honors, Awards, and Fellowships

Women's Philanthropy Institute Doctoral Dissertation Fellow, 2015 ($5,000)

ARNOVA Doctoral Fellowship and Seminar Participant, 2015 ($750)

Center for Service and Learning, Dissemination Grant Award, 2015 ($315)

Graduate/Professional Student Educational Grant, IUPUI Graduate and Professional Student Organization, 2014 ($500)

ARNOVA Scholarship and Travel Grant, 2014 ($250)

Service Learning Assistant Grant, Center for Service and Learning, IUPUI, 2014-2015 ($9,750 awarded for multiple P105 courses)

International Society for Third-Sector Research (ISTR) Ph.D. Seminar, 2014 (in-kind)

Educational Enhancement Grant, IUPUI Graduate and Professional Student Organization, 2014 ($500)

Service Learning Assistant Grant, Center for Service and Learning, IUPUI, 2013-2014 ($1,500)

Course Development Grant for Online Format of Giving and Volunteering in America, IUPUI, 2013 ($1,000)

ARNOVA Diversity Scholars Award and Professional Development Workshop, 2013 ($250)

ARNOVA Scholarship and Travel Grant, 2013 ($250)