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The Art of Giving John Williams and Chuck Lundeen Fine-Tune the Practice of Philanthropy

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The Art of Giving JOHN WILLIAMS AND CHUCK LUNDEEN FINE-TUNE THE PRACTICE OF PHILANTHROPY

Spend a little time with John Williams and Chuck Lundeen, and the words "impactful" and "legacy" are bound to crop up.

"You get to our age, and you start thinking about legacy," says John, as he and Chuck relax with a visitor in their spacious apartment at Carriage Hill. A retired lawyer, John was working with Thomson Reuters in the 1980's and volunteering at the Rochester Gay Men's Chorus when he met Chuck, a teacher in Canandaigua at the time, and who sang in the chorus (and tap danced with the Rochettes).

Now, 31 years later – and eight years after they married at the Downtown United Presbyterian Church – the couple is in the midst of their annual planning season to ensure that their "legacy" is "impactful." It boils down to planning their annual financial support for Rochester's arts and culture community, together with their annual commitment to a scholarship program at Nazareth College. The scholarship, which they founded in 2016 and is named for them, provides financial support to Nazareth students who identify themselves as members of the college's LBGTQ community.

John and Chuck's methodical approach to philanthropy was cited in 2017 by the Rochester Area Community Foundation, when the Foundation held its annual awards dinner honoring local philanthropists. "When it comes to their philanthropy, this Pittsford couple firmly believes it's about being intentional and proactive. Together, they work out their giving plan a year in advance."

That expression "a year in advance" is music to the ears of anyone in the fundraising business. It underscores the values of long-term planning

and methodical prioritizing that are key to any nonprofit organization's strategic planning processes.

And the expression points to the careful, methodical process through which Chuck and John plan and distribute their annual charitable donations. They have a governing philosophy that in turn provides a focus: They both want to support local grassroots arts organizations, as well as organizations aligned with the interests of Rochester's LGBTQ communities. As this issue of Pittsford Neighbors is being distributed throughout the Pittsford community, both John and Chuck are looking "a year in advance," planning future financial support for organizations aligned with their priorities.

"It gives us peace of mind, really," John says. "When you have this over-riding philosophy, it's easier to say to someone their organization does – or doesn't – fit in with your plans. It makes our life simpler in the long run. We have the plan. Now it's just a matter of tweaking it."

Both the Rochester Philharmonic Orchestra and GEVA Theater Center are beneficiaries of John and Chuck's annual philanthropy, as well as the Eastman Museum. But those are big organizations, with big donors, and John and Chuck pride themselves on a philanthropy that doesn't just involve seven-figure bequests. They spend a significant portion of their planning in choosing smaller organizations tied to the arts and supporting for individuals who identify as members of the LGBTQ community. Those organizations include WXXI and the Little Theater; also ImageOut, Rochester's annual LGBTQ film festival; and the LGBT Giving Circle, of which John and Chuck are founding members. The latter organization further leverages their support, identifying not-forprofit organizations "that serve, are inclusive of, or are allied with the LGBTQ community and have programs that foster collaboration."

And then there's the scholarship at Nazareth College.

The college oversees dozens – scores – of endowed scholarships funded by alumni and other benefactors. There are scholarships for students demonstrating financial need, scholarships for students studying art, scholarships for students studying business, or nursing, or communications studies. But four years ago, when a Nazareth development officer first sat down with John and Chuck, the college had no scholarship for students who identified themselves as lesbian, gay, bisexual, transgender, or queer – or "questioning," John notes.

"This was a void in their scholarship programs," he says "They wanted to address it."

The result was a minimum five-year commitment consisting of annual payments into a student scholarship fund dedicated to LGBTQ students. (The college, John says, uses the "Q" acronym to signify "Questioning.") As a college representative explained the funding process, by the time John and Chuck made their fifth annual payment, the scholarship would be self-funding through its own interest-bearing investments. In addition, other donors could contribute to the fund.

The upshot is that Nazareth College's Williams-Lundeen Scholarship for LGBTQ Students has already begun disbursing funds to undergraduates in need. In the words of Nazareth College itself: "The Williams-Lundeen Scholarship for LGBTQ Students will be awarded annually to a student(s) who self-identifies as gay, lesbian, bisexual, transgender, or questioning. All awardees must self-identify as members of the LGBTQ community and be a full-time student in good academic standing."

"What we've been told by students receiving the scholarship," John says, "is that it's enough money to free them from the necessity of working a second job on top of their academic studies."

When John and Chuck aren't busy planning philanthropic campaigns, they enjoy the huge range of arts and culture Rochester provides. Chuck no longer sings bass with the Rochester Gay Men's Chorus – or dances tap with the Rochettes – but he remains active in the city's music community. A former English and French teacher at the Canandaigua Middle School, he has volunteered with Literacy Volunteers and trained volunteer teachers with the organization. A recipient in 2008 of a liver transplant, he also serves on the board of the Transplant Awareness Organization. And he has taught classes in opera appreciation for the Rochester chapter of OASIS, a national educational organization offering adult courses in the arts, humanities, health, technology and volunteer service.

Both men are passionate about music. While John serves on the boards of the Geva Theater Center and as co=chair the LGBT Giving Circle, he is also a gifted pianist who loves playing traditional pops and Broadway musical songs; he performs regularly at clubs, private homes and senior living organizations around the Rochester area. ("I could have a gig every day," he says. "I can't do it, though – it would wear me out.")

Volunteering their time and talents in the community, with philanthropy being only the financial component of their generosity, is something they began as children. "It's something we've always done, each in his own way," says Chuck. "I grew up with the March of Dimes and The American Heart Association. We both started giving as children to our local churches."

"The motto is 'Give where you live,'" says John. "It's a question of being community connected. And that's just in our DNA."





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