



GAMMA MU FOUNDATION

Business
Plan
2019–2024

Established in 1988 by members of the Gamma Mu Social Fraternity, the contributors, members, and volunteers of the Gamma Mu Foundation are a network of people working together to make a positive difference in LGBT communities.

The Gamma Mu Foundation pools the personal charitable contributions of its members and provides charitable grants and scholarships to support people in rural and underserved LGBT communities to combat isolation and discrimination, build social connection and support, treat and prevent HIV, and advance educational and professional opportunity.

The Gamma Mu Foundation is unique as a national network with a 30-year history of pooling charitable contributions for the benefit of rural and underserved LGBT communities. Since our founding, Gamma Mu Foundation has mobilized over \$3 million for grants and scholarships and we have the capacity to mobilize and contribute that level and more in the years ahead.

The following is a summary of a five-year business plan describing the future directions of the Foundation. This plan defines a shared vision for the Foundation's trajectory and long-term future and a framework for specific annual operational plans and measures for monitoring, evaluation and learning.





Strategy & Goals

Who We Are and What We Do

Established in 1988 by members of the Gamma Mu Social Fraternity, the contributors, members, and volunteers of the Gamma Mu Foundation are a network of people working together to make a positive difference in LGBT communities.

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Our Planned Actions and Goals During 2019-2024 Include:

<p>Each year, the Foundation will communicate about its work to the members of the Gamma Mu Social Fraternity and to other potential participants and allies.</p> <p>1000+ people will be reached each year through public communications from the Foundation.</p> <p>500 people will be reached with direct communications from the Foundation.</p>	<p>Each year, the Foundation will convene 250 participants, leaders and funders to work together to advance the Foundation's mission.</p> <p>250 people will regularly participate in the events and work of the Foundation.</p> <p>30 people will be active as core sustaining Board members, volunteers and contributors to the Foundation.</p>	<p>Each year, the Foundation will contribute significant funding through grants and scholarships to make a positive difference in the lives of LGBT communities.</p> <p>1000+ people will benefit from grants each year awarded from the Foundation.</p> <p>20+ people each year will be provided with Foundation scholarships.</p>
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To Achieve These Goals, The Gamma Mu Foundation Will:

<p>COLLABORATE</p> <p>with the Social Fraternity and its national events, local events, and local clubs to engage people in supporting charitable scholarships and grants to benefit gay men and others in rural and underserved LGBT communities.</p>	<p>STRATEGICALLY ENGAGE</p> <p>potential allies, contributors and participants from outside the Social Fraternity.</p>	<p>INVEST</p> <p>in engaging, organizing and supporting the 250 people who are regular participants and core sustaining leaders, volunteers and contributors of the Foundation.</p>
<p>MANAGE</p> <p>financial investments to ensure steady growth in the Foundation's portfolio and resources for grant making.</p>	<p>BUILD & MAINTAIN</p> <p>strong grant making strategies and processes.</p>	<p>BUILD & MAINTAIN</p> <p>information technology and tools for collaborative work and communications.</p>



The Gamma Mu Foundation's goals

Goal 1: We will communicate about our work.

Each year, the Gamma Mu Foundation will communicate about its work to the members of the Gamma Mu Social Fraternity and to other potential participants and allies, to provide updates about the Foundation's work and invite people to support the Foundation's mission.

- The Foundation will communicate about its work, providing information about the Foundation to over 1000 people each year through the Foundation's website and by communications through social media and public media.
- The Foundation will reach at least 500 people each year, including at least 400 members of the Gamma Mu Social Fraternity, through mailings, e-mail, and other direct communication, including in-person interaction at Foundation-related events during national fly-in weekends.

This work will be led by a Foundation **Communications Committee**, which will lead and oversee communications through public-facing website and media and through mailings, e-mail and social media postings directed to members of the Social Fraternity and of the Foundation.

The number of people contacted will be tracked as a key performance indicator, but the primary emphasis will be on quality of communication and interaction with Foundation participants and allies, toward building a community of people contributing their time and financial contributions toward making a positive difference in the lives of LGBT communities.

The Foundation will work alongside the Social Fraternity leadership to set and achieve targets for reaching people of diverse skills, ages, and backgrounds in a range of locations (especially locations of current Social Fraternity members) to align with the growth and evolution of the Social Fraternity membership.



The Foundation will work alongside the Social Fraternity leadership to set and achieve targets for key forms of communication, including engagement of people at in-person events and meetings and through email, social media, telephone, and mailing of print communications.

Goal 2: In collaboration with the Social Fraternity, we will regularly convene the Foundation’s volunteer members, leaders and funders to work together to advance the Foundation’s mission.

- The Foundation will secure multi-year or structured donations from at least 50 people each year, including as Cliff Pettit fellows, Legacy contributors, named scholarship and grant sponsors, and other named or structured charitable donation opportunities as created and offered by the Foundation.
- The Foundation will engage at least 30 people as committed volunteers, including as Board members, committee members, and regional and local contacts and representatives.

This work will be led by a Foundation **Development Committee**, which will lead and oversee the engagement and cultivation of people as Foundation participants, leaders and contributors.

The Foundation will aim to invest in its events and interactions with volunteers and contributors to reinforce relationships among people who renew their commitments of time and resources to the Foundation, and to build a strong supportive community for shared action.



Goal 3: We will mobilize funding for grants and scholarships to make a positive difference in rural and underserved LGBT communities.

- Through an open annual process, the Foundation will receive and review over 100 scholarship applications and over 60 organizational grant proposals, to benefit at least 20 people with undergraduate and post-graduate scholarships and at least 1000 people through grants to organizations addressing HIV or meeting other needs faced by LGBT subpopulations such as youth, seniors, and victims of domestic violence.

This work will be led by Foundation **Grants and Scholarships Committees**, which will lead and oversee the processes of developing calls for proposals and application forms, launching and publicizing calls for proposals, ensuring review and scoring of proposals, conducting due diligence of potential awardees, awarding funding, and communicating to Foundation members and contributors about grant making results and awardees.

The Foundation will aim to develop a quality grant making process and related communications to reinforce relationships among Foundation members who are volunteering time and funding to this grant making effort, and to build a strong supportive community for shared action.

Specific activities and targets are defined in the strategies described later in this document. The Foundation Board will review its targets each year, to adjust and build its work based on performance data of the previous year.



The Gamma Mu Foundation's strategies to achieve its goals

1. Engaging members of the Gamma Mu Social Fraternity
 2. Engaging allies, contributors, and participants from outside the Gamma Mu Social Fraternity
 3. Connecting, involving, and supporting volunteers and contributors of the Foundation
 4. Managing financial revenue and investments to ensure steady growth in the Foundation's portfolio and funding for grant making.
 5. Building and maintaining strong grant making strategies and processes
 6. Building and maintaining the tools for collaborative work and communications.
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Strategy 1. Engaging members of the Gamma Mu Social Fraternity

The Gamma Mu Foundation will collaborate with the Social Fraternity and its national events, local events, and local clubs to engage Fraternity members in supporting charitable grants and scholarships to benefit people in rural and underserved LGBT communities.

The Gamma Mu Foundation was established in 1988, originating from the Gamma Mu Social Fraternity, through the organizing and contributions from that social network. Thirty years later, in 2018, the deep links remain. Nearly all of the Gamma Mu Foundation's contributors, members, and volunteers are members of the Gamma Mu Social Fraternity, and approximately 80 percent of the Gamma Mu Social Fraternity's members are contributors and members of the Foundation.



The relationship between the Foundation and Social Fraternity is mutually reinforcing. Many members of the Social Fraternity view their participation in the charitable work of the Foundation as a positive part of their participation in the social network. The alignment of the Foundation's work with Social Fraternity events and communications provides the Foundation with its base of volunteers and contributions.

During 2019-2024, the Foundation will continue to collaborate with the Social Fraternity to engage Fraternity members in the Foundation's work:

Improved integrated communications to all social group members: The Foundation will collaborate with the Social Fraternity to communicate about the Foundation's work to all social group members through national events, mailings, e-mail, and outreach through social media.

During 2019: The Foundation will communicate about the Foundation's work to Fraternity members by:

- Organizing Foundation events in coordination with national fly-ins and other national events
- Writing and mailing of the Foundation annual report and renewal letters
- Writing and distribution of an e-mail newsletter and other updates
- Outreach through the Foundation website and social media

Local organizing: In alignment with the Social Fraternity's effort to strengthen local organizing and recruitment, the Foundation will establish elected "Foundation liaisons" in each of the metropolitan areas where the Fraternity has the largest number of active participants. These liaisons will serve as local points of contact and sources of information about the Foundation, and will participate in local social events, fundraising, and related communications and outreach.

During 2019: The Foundation will pilot Foundation liaisons in at least five cities, considering metropolitan areas where the Fraternity has the largest number of active participants such as Atlanta, Chicago, Dallas, Denver, Ft. Lauderdale, Houston, Los Angeles, New York, Palm Springs, San Diego, and Washington DC. Each of those liaisons will be provided with necessary information and support to serve as a local point of contact for the Foundation and will report back at Foundation meetings about local fundraising, and related communications and outreach. Based on this experience, the Foundation will consider further formalizing and expanding this effort.



Strategy 2. Engaging allies, contributors, and participants from outside the Gamma Mu Social Fraternity

The Gamma Mu Foundation will, alongside the Social Fraternity, engage new allies, contributors and participants for both the Foundation and Social Fraternity.

The mission and charitable grant making of the Gamma Mu Foundation is well regarded and attracts the interest of a wide range of people. including people who are potential members of the Social Fraternity, and also people who are not interested or able to participate in the social network. Nearly all of Foundation's members and volunteers are currently also members of the Social Fraternity. The Foundation has the potential to connect and involve new people, including people who may be interested in joining the Social Fraternity, and people and organizations who may not (or may no longer) have an interest or ability to participate in the social network but who are able to participate in and contribute to the Foundation.

During 2019-2024, the Foundation will work alongside the Social Fraternity to engage new allies, contributors and participants, focusing its efforts in two ways:

Prospective Social Fraternity members: The Foundation will support the Social Fraternity in its orientation of new members about the Foundation.

During 2019: The Foundation will support the Social Fraternity in its membership efforts by: Providing the Fraternity's prospective or new members with a packet of Foundation material and opportunities to learn more about the Foundation.

Other individual allies and contributors: The Foundation will develop itself as an organization that welcomes people who are not members of the Social Fraternity to be allies of and contributors to the Foundation.

During 2019: For people who may be interested in significant investments and participation in the Foundation without participating in the Fraternity, the Foundation will define and consider a policy that defines how the Foundation can structure its work to encourage that engagement, and also how the Foundation will actively structure its work to be welcoming of participants regardless of gender, race, age, or social and economic background.



Strategy 3. Connecting, involving, and supporting volunteers and contributors of the Foundation

The Gamma Mu Foundation will work with the individuals who are regular Foundation participants and its core sustaining leaders, volunteers and contributors to cultivate their ongoing connection and involvement.

Approximately 250 people now regularly participate in the work of the Gamma Mu Foundation, either as Foundation contributors (Cliff Pettit fellows, Legacy contributors, and named scholarship and grant sponsors) and/or as the approximately 30 people who serve as Foundation Board members and committee members (including members of grants and scholarship review committees). These individuals are connected to and involved in the work of the Foundation through events, mailings, e-mail, and outreach through social media.

During 2019-2024, the Foundation will systematically and deliberately engage its current participants to further support and cultivate their connection and involvement.

Cultivation of volunteer relationships and commitments: With each of the people participating as Foundation Board members and committee members, the Foundation will seek to collect a regular self-assessment of current and planned involvement in the Foundation. Assessments will include people's level of satisfaction with current connection and involvement in the Foundation's work, ambitions and expectations of potential future involvement, and needs and recommendations for additional volunteer skills, training, and support. Assessments could ask about people's incentives for volunteering and whether there are actions (e.g. committee structures or local clubs, underwriting travel for more regular in-person time, other remuneration, etc.) would be helpful to support people in sustaining their volunteer role.

During 2019: The Foundation will develop a self-assessment form and distribute and collect data from all current volunteers. The Foundation will then begin to compile and apply the findings of this data to adjust its structures and recruit and match people to volunteer roles that match their abilities, availability, and interests.



Cultivation of contributor relationships and commitments: Working with the leaders of the Social Fraternity, the Foundation Board and committee members will aim to meet with every Cliff Pettit Fellow, Legacy contributor, and named scholarship and grant sponsor to encourage ongoing increased Foundation participation and contributions, aiming to increase the number of active volunteers and raise \$1 million during the coming five years.

Toward that goal of raising \$1 million during the coming five years, the Foundation will set targets for numbers of contributors by tier of commitment, such as aiming for 200 people giving up to \$500 each year, 50 people giving \$500-\$5000 each year, and 10 people giving at least \$5000 each year, with the highest tier (\$5000 per year or more) offered the option of having a scholarship or grant named in acknowledgment.

During 2019:

- The Foundation will organize an Active Fellows Fly In alongside its 2019 summer Board meeting in which all current Cliff Pettit Fellows will be invited to a meeting that provides updates about the Foundation's work, describes the impact of contributions (value for money, what various levels of contributions can 'buy'), allow people to discuss their interests, incentives, and goals for giving to the Foundation, and build a shared commitment to their connection, involvement and investment in the Foundation's long-term future.
- Among Cliff Pettit Fellows and contributors giving donations of \$1000 or less per year, the Foundation will continue to acknowledge and encourage donations. All 250 Cliff Pettit Fellows will be reached with an annual renewal mailing to ensure a renewal and potential increase in their donation to the Foundation.
- Among the 10 to 50 contributors giving more than \$1000 per year, the Foundation will create and implement a structure of delegated peer-to-peer outreach, including to current and potential sponsors of named grants and scholarships, to acknowledge the commitment and encourage a renewal and potential increase in their donation to the Foundation.
- For those who have pledged Legacy commitments, the Foundation will encourage people to voluntarily inform the Foundation of the amount of that commitment to help the Foundation quantify and increase its future revenue.



Strategy 4. Managing financial revenue and investments to ensure steady growth in the Foundation's portfolio and funding for grant making.

The Gamma Mu Foundation will manage its financial contributions and investments to build the Foundation's sustained capacity to award charitable grants and scholarships to benefit people in rural and underserved LGBT communities.

Through sound investments and a steady level of contributions, the Gamma Mu Foundation has been able to grow its financial resources by an average of 12 percent per year during the past decade, while also spending at least 5 percent of this total in charitable grants and scholarships and related costs.

As of September 2018, Gamma Mu holds a financial reserve of \$3.3 million and is projected to have over \$500,000 in revenue (\$400,000 in investment income and \$100,000 in contributions) and \$250,000 in expenditures (\$200,000 in grants and scholarships and \$50,000 in other expenditures).

During 2019-2024, the Foundation will seek to continue to grow its financial resources by an average of at least 10 percent per year, while spending at least 5 percent of this total in charitable grants and scholarships and related costs.

Contributions and other income: The Gamma Mu Foundation will seek to steadily increase its revenue from charitable donations through a deliberate and planned effort to invite people to invest and renew as Cliff Pettit Fellows, Legacy contributors, and sponsors of named grants and scholarships, aiming to raise \$200,000 each year or \$1 million during the coming five years. (see Strategy 3)

Management of financial investments: The Gamma Mu Foundation will sustain and develop its approach and methods for financial management, including defining the human resources and strategies to invest, track, and report on financial reserves, oversee bookkeeping and accounting, and oversee tax filing and audits. The Foundation will aim to achieve an average annual return of at least 10 percent (for a target of a \$2 million increase in the portfolio over five years) and to continue proper oversight of the organization's accounts.



During 2019:

- The Foundation will continue to maintain its current approach of invest, track, and report on financial reserves, oversee bookkeeping and accounting, and oversee tax filing and audits (Leads: Ken).
- The Foundation will identify and begin to mentor a volunteer(s) to ensure ongoing and long-term volunteer capacity for the Foundation's financial management. (Leads: Ken)

Expenditures: The Gamma Mu Foundation will continue to spend at least 5 percent of its investments in charitable grants and scholarships, aiming to award a total of at least \$200,000 per year for a total of at least \$1 million during the coming five years. (See Strategy 5)

Strategy 5. Maintaining strong grant making strategies and processes

The Gamma Mu Foundation will build and maintain strong strategies and processes to award charitable grants and scholarships to benefit people in rural and underserved LGBT communities.

Through an open annual process, the Gamma Mu Foundation currently receives and reviews over 150 scholarship applications and over 50 organizational grant proposals, and awards approximately 20-25 organizational grants and approximately 20 undergraduate and post-graduate scholarships each year. The Foundation's Grants and Scholarship Committees lead and oversee the processes of developing calls for proposals and application forms, launching and publicizing calls for proposals, ensuring review and scoring of proposals, conducting due diligence of potential awardees, awarding funding, and communicating to Foundation members and contributors about grant making results and awardees.

During 2019-2024, the Foundation will continue to invest in quality grant making processed and related communications to maximize the potential impact of its grantmaking and ensure that Foundation contributors are informed and avid supporters of the grant making.

Organizational grants and individual scholarships: The Gamma Mu Foundation will raise and award at least \$1 million in grants and scholarships during the five years of 2019-2024.

During 2019: The Foundation will raise and award at least \$200,000 in organizational grants and individual scholarships during 2019. (Leads: Peter and Doug)



Strategy 6. Building and maintaining the tools for collaborative work and communications.

The Gamma Mu Foundation will build and maintain the information technology and tools for collaborative work and communications.

As a national organization, the Gamma Mu Foundation relies on a range of information technology and tools to connect its members and contributors and to facilitate collaborative work and communications among its Board members and committee members, including members of grants and scholarship review committees.

These tools include a Wordpress website, an online NeonCRM database of contributors, use of Foundant for grant making, use of Quickbooks Online for financial management, and use of Facebook (and potentially Twitter and Instagram) for communication through social media.

There may be new online software and information technology options that can unify some or all of these tools, and that are easily and inexpensively adoptable by the people currently participating in the Foundation.

During 2019-2024, the Foundation will:

Maintain current information technology and tools: The Gamma Mu Foundation will maintain its website, database of contributors and participants, online grant making system, financial management software, and social media presence, including updating content and providing orientation, training, support to all volunteers in the effective use of these tools. .

Develop improved information technology and tools: The Gamma Mu Foundation will assess and adopt new technologies and tools to facilitate its collaborative work and communications, prioritizing approaches that are (a) easily and inexpensively adoptable by the people currently participating in the Foundation, (b) able to be segmented and personalized to different internal and external groups by location, level of engagement in the Foundation, and work task / theme, and (c) adaptable to a range of devices and types of communications. .



Consolidated Dashboard to track Business Plan deliverables, deadlines, and leads for 2019

16 Key Deliverables (to expand into tasks, outputs, outcomes, performance indicators)	Goal / Committee / Comments	Lead Responsible	Deputy / Second / Back-up / Being Mentored In	Deadline / Status
1. Organize Foundation events to engage Social Fraternity members at national fly-ins	Communications			
2. Mail the Foundation annual report and renewal letters	Communications			
3. Write and distribute the e-mail newsletter and other updates	Communications			
5. Pilot elected Foundation liaisons in at least five cities	Communications			
6. Maintain current IT, including content of website, database of contributors and participants, online grant making system, financial management software, and social media presence	Communications			
7. Assess new integrated technologies and tools to facilitate its collaborative work and communications	Communications			
8. Communicate through Foundation website updates and social media posts.	Communications			
9. Conduct calls and meetings with similar organizations to inform and align efforts.	Communications			
10. Define a policy related to participants who not part of the Social Fraternity.	Development			
11. Distribute and collect self-assessment from all current volunteers about current and planned involvement in the Foundation.	Development			
12. Develop a fundraising plan, toward the goal of raising \$1 million during the coming five years.	Development			
13. Organize an Active Fellows Fly In alongside its 2019 summer Board meeting	Development			
14. Organize peer-to-peer outreach to top contributors to acknowledge and solicit donations.	Development			
15. Maintain current approach of financial management	Financial Management			
16. Award at least \$200,000 in grants and scholarships	Grants & Scholarships			

Status Chart	
√	Completed as planned
√C	Completed with changes
↔	Partially Completed, In Progress
N/A	No longer applicable, shift in priorities
≠	Not Completed, but worthwhile to complete

