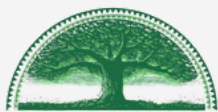


GAMMA MU FOUNDATION

SURVEY REPORT

SHAPING OUR FUTURE TOGETHER



GAMMA MU
FOUNDATION

Gamma Mu Foundation, Inc.

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A photograph of three men smiling and laughing outdoors. The man in the center is wearing a green polo shirt, the man on the left is wearing a blue polo shirt, and the man on the right is wearing glasses and a light-colored shirt. They are in a social setting with trees and string lights in the background.

MISSION STATEMENT

The Gamma Mu Foundation is a nonprofit charitable foundation that seeks to make a positive difference in the lives of the LGBTQ+ community, primarily in rural and underserved populations of the United States.

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FEEDBACK FROM SURVEY RESPONDENTS

"Gamma Mu Foundation is incredible. It is a way for Gamma Mu Social members and Foundation members to enhance the power of friends to collaborate to do something magnificent. It is not like donating to a huge organization but rather a way for fraternal members and friends to collaborate to do something great for the world and feel good."

"I like knowing that the money I give to GM each year is going to help younger LGBTQ+ people in their struggles for equality and access."

"I believe that the Board is doing a fantastic job. The donors feel incredible... and the tie between the Social and the Foundation is strong and hopefully continue long into the future."

"[I think] there is an opportunity to attract new donors and encourage current donors to do more if we have some simple (lasting a few hours) and in-person social events and gatherings."

FOREWORD

We are pleased to present the findings of the Gamma Mu Foundation Donor Survey, a comprehensive initiative that enhances our ability to serve the LGBTQ+ community further. These results effectively convey donor sentiments and provide valuable insights for future action, serving as the cornerstone of our mission and guiding us toward a more inclusive, responsive, and impactful future.

We sincerely thank each participant for their invaluable feedback, which underlines the resilience of our Gamma Mu Foundation community and reaffirms our collective commitment to advancing the inclusion and well-being of LGBTQ+ people and their communities.

As we reflect on past endeavors and adapt to the challenges posed by the COVID-19 pandemic, your voices remain central in shaping our strategies and future initiatives. Your insights drive the evolution of our organization, standing as a testament to the Foundation's collective resilience and dedication.

We take great pride in our success as an entirely volunteer-based organization. Despite the hurdles presented by COVID-19, we have successfully navigated them and eagerly anticipate strengthening our support for the LGBTQ+ community. Your ongoing participation energizes our determination to ensure every voice is heard and valued.

We greatly appreciate your steadfast commitment to the Gamma Mu Foundation and the LGBTQ+ community. Your generosity and commitment serve as the driving force behind our shared vision of a more just and equitable society. We extend our gratitude and heartfelt thanks to all who participated in this survey — your opinions genuinely matter.



JOHN ELLIS

President

Gamma Mu Foundation

SUMMARY

The purpose of the Gamma Mu Donor Survey Report is to advance the strategic goals set forth in the Gamma Mu Foundation's 2019-2024 Business Plan (Freemont Report), significantly aiding the Foundation in fulfilling its mission. The survey acts as an essential tool for aligning the Foundation's actions with donor expectations and needs, a critical factor in maintaining engagement and propelling the mission forward. The survey contributes to the Foundation's strategic objectives in three fundamental ways:

- 1. Assessing the Foundation's Efforts to Achieve Its Mission:** The Survey captures donor perceptions and satisfaction, providing critical insights into how its donors view the Foundation's efforts.
- 2. Identifying Priorities as the Foundation Evolves:** By understanding what donors prioritize, the Foundation can adapt its focus and resource distribution to meet these evolving needs.
- 3. Generating Recommended Actions:** The Survey does more than assess; it actively seeks donor suggestions for improvements or new initiatives. By translating donor feedback into actions, the Foundation can implement targeted strategies to address specific areas of concern or opportunity, driving continuous improvement and innovation.

The recommended actions outlined in the survey's Annex section support the Gamma Mu Foundation's continuous growth and effectiveness. These actions bridge donor feedback with tangible actions that enhance the Foundation's impact and operational efficiency.

THE NUMBERS

- **336 invitations** were sent out, utilizing the Foundation's Constant Contact® list.
- **127 donors, representing 37 percent** of the total invitations, completed the survey.
- **24 key informant interviews** with major donors were conducted by John Ellis, Chuck Kuglen, and Dean Greeson.
- The survey remained open for **11 weeks**, from October 1st to December 17th, 2024, using the Survey Monkey® platform.

KEY FINDINGS

- 1. Eighty-five percent of survey respondents strongly agree/agree with the Foundation's mission statement.**
- 2. Nearly 90 percent of survey respondents are highly confident/confident in the Foundation's ability to manage its financial resources efficiently to maximize the impact of scholarships and grants.**
 - Twenty percent of respondents collectively donated over \$50,000 to \$100,000 or more, while 30 percent contributed between \$10,000 and \$50,000. The remaining 50 percent donated under \$10,000.
 - About 70 percent of respondents support prioritizing recipients for grants and scholarships as currently practiced by the Foundation.
 - Fifty percent of respondents support the current distribution ratio of approximately 60/40 for grants and scholarships, as negotiated between chairs, while 30 percent of respondents believe that scholarships should receive a higher percentage of funding.
 - Half of the survey respondents agree with the current funding tiers for grants and scholarships.

3. Recruitment of new donors is a priority to uphold the Foundation's effectiveness.

- Eighty-two percent of survey respondents strongly agree/agree that recruiting new donors is a priority.
- Eighty-four percent of respondents to the survey are over 60 years old, reflecting the aging demographic of the Foundation's core recurring donors.
- Only 16 percent of respondents have joined the Foundation within the past five years, indicating current donor recruitment challenges.
- Seventy-four percent of respondents reside in the West Coast or Southeast regions. This regional concentration presents an opportunity to prioritize recruiting new donors in other regions for better geographical diversity.
- Sixty-nine percent of survey respondents were introduced to the Foundation through membership in Gamma Mu Social. In contrast, 30 percent were introduced to the Foundation by a friend or partner who is a donor.
- Furthermore, the highest percentage of respondents referred to the Foundation by a friend or donor are between 40 and 59 years old.
- Some 40 percent of respondents are not active Gamma Mu Social members, indicating a decline in new donors from this traditional recruitment source.

4. Donor retention is essential for securing consistent annual funding and cultivating a volunteer pool for potential board members, committee participants, or regional directors.

- Almost 40 percent of survey respondents do not make donations at least once a year. Among those who answered negatively, the reasons cited included 1) personal financial constraints, 2) prioritization of other charitable or nonprofit organizations, and 3) a lack of connection with the Foundation.
- Seventy percent of respondents have not served on the Foundation's Board or committee. Among those who have, 70 percent served more than one three-year term.
- More than 75 percent of respondents acknowledge the necessity of Regional Directors to enhance donor engagement, improve board communication, ensure follow-up with grantees/scholarship recipients, and facilitate local in-person gatherings.
- Roughly 90 percent of respondents would recommend that their friends become donors to the Foundation.

5. Survey respondents overwhelmingly agreed that the Foundation's communication efforts with its donors have improved.

- Constructive feedback from respondents recommends updating the website, newsletter, and other communication materials according to current design standards to convey a compelling narrative of the Foundation's successes and impact.
- The top three social media platforms respondents primarily use are Facebook® (56%), LinkedIn® (24%), and Instagram® (15%).
- Only 51 percent indicated receiving a welcome package. Notably, among those who did receive it, over 60 percent were individuals who joined the Foundation within the past 15 years.
- Seventy-eight percent of respondents reported receiving recognition for their donations. The most common forms of recognition included being mentioned in the annual report/newsletter, receiving a plaque/certificate, or receiving a direct email.
- Respondents identified email as their preferred method of receiving updates from the Board, while social media, the website, and regular mail were also recognized as helpful communication channels.

BACKGROUND

Founded in 1988 by Gamma Mu Social Fraternity members, the Gamma Mu Foundation (Foundation)¹ is a dedicated network of donors and volunteers driving positive change within LGBTQ+ communities. Since its inception, the Foundation has raised over \$10 million through individual donations, event fundraising, and investment returns on its *corpus*. Approximately 70 percent of this sum has been raised since 2014, demonstrating continued growth. By the end of 2024, the Foundation will have distributed up to \$5 million through its grants and scholarships programs to support its mission while retaining a \$5 million *corpus*.²

The Foundation targets its support through grants and scholarships towards LGBTQ+ groups and individuals in rural and underserved areas. Its giving approach demonstrates the profound impact that focused philanthropy can have on the lives of LGBTQ+ people and advances long-term inclusivity and equality.

FINANCIAL IMPACT SUMMARY

Funds Raised: Over \$10m through donations, events and investments

Funds Distributed: Some \$5m in grants and scholarships

Current Corpus: Maintains a \$5m *corpus*

GRANTS

The Foundation aims to provide grants to nonprofit organizations primarily serving rural LGBTQ+ people throughout the United States. It provides financial assistance directly to projects related to HIV and health programs, community support services, and public education and research efforts that benefit the LGBTQ+ community. As of 2023, the Foundation has disbursed \$3.6 million across 534 grants to 204 nonprofit organizations spanning 48 states, Washington DC, and Puerto Rico.³

GRANTS BY REGION

Midwest/Mountain	31%
South/Southeast	26%
West Coast	17%
Mid-Atlantic	13%
Northeast	13%

TOP 5 STATES RECEIVING GRANTS

FL	46
CA	43
VT	41
TX	27
NY	26

¹gammamufoundation.org

²The *corpus* refers to a foundation's or charity's initial investment and ongoing retained *net worth*. This principal, usually donations or grants, is invested to generate income for a foundation's charitable purposes. The investment income and returns fund activities and grantmaking, while the *corpus* is usually kept. A foundation's long-term sustainability and mission funding depend on preserving the *corpus*, which allows the foundation to operate in perpetuity.

³As of 2023, no groups in Nevada and North Dakota groups receive grants.



SCHOLARSHIPS

Moreover, the Foundation offers financial support through academic scholarships to underserved individuals within the LGBTQ+ community. These scholarships are aimed at those who exhibit financial need, have been adversely affected by discrimination, actively contribute to their local LGBTQ+ community, and display a solid commitment to academically advancing their education or vocational pursuits. Since 2000, the Foundation has awarded 352 scholarships to students enrolled in undergraduate and graduate programs and vocational schools, with a cumulative value exceeding \$780,000 by the end of 2023.

Transparency is the cornerstone of trust and accountability for nonprofit foundations, as exemplified by the Foundation's achievement of the GuideStar Platinum Seal of Transparency Rating⁴ for the fifth consecutive year. This prestigious recognition places the Foundation among the top 0.1 percent of nonprofit organizations nationwide regarding transparency.

The Foundation maintains trust and credibility by providing donors with comprehensive information about its initiatives, finances, and impact. It empowers donors to make informed decisions about their philanthropic contributions, ensuring alignment with the Foundation in advancing the well-being of the LGBTQ+ community.

"I wholeheartedly endorse this survey and its conclusions. So many of our members participated and this summary reflects the majority of their thoughts. We are collectively hoping to see these recommendations acted upon in a positive manner."

– Cliff Pettit, Founder, Gamma Mu Social Fraternity



⁴[guidestar.org](https://www.guidestar.org)

THE SURVEY

The purpose of the Gamma Mu Donor Survey Report is to advance the strategic goals set forth in the Gamma Mu Foundation's 2019-2024 Business Plan (Freemont Report), significantly aiding the Foundation in fulfilling its mission. The survey is an essential tool for aligning the Foundation's actions with donor expectations and needs, a critical factor in maintaining engagement and propelling the mission forward. The survey contributes to the Foundation's strategic objectives in three fundamental ways:

- 1. Assessing the Foundation's Efforts to Achieve Its Mission:** The Survey captures donor perceptions and satisfaction, providing critical insights into how its donors view the Foundation's efforts.
- 2. Identifying Priorities as the Foundation Evolves:** By understanding what donors prioritize, the Foundation can adapt its focus and resource distribution to meet these evolving needs.
- 3. Generating Actionable Recommendations:** The Survey does more than assess; it actively seeks donor suggestions for improvements or new initiatives. By translating donor feedback into actions, the Foundation can implement targeted strategies to address specific areas of concern or opportunity, driving continuous improvement and innovation.

The survey plays a vital role in informing the Foundation's strategic decision-making process. By leveraging these insights, the Foundation can strengthen its position as a leading advocate for the LGBTQ+ community and continue making meaningful strides toward achieving its mission.

RECOMMENDED ACTIONS

The recommended actions outlined in the survey's Annex section are a guide to the Gamma Mu Foundation's continuous growth and effectiveness. These actions bridge donor feedback in actions that enhance the Foundation's impact and operational efficiency.

By implementing these recommended actions, the Foundation can achieve the following:

- 1. Enhance Impact:** Addressing the specific suggestions and concerns donors raise allows the Foundation to tailor its initiatives to better meet the needs of the LGBTQ+ community. This targeted approach ensures that resources are allocated efficiently and that programs have a meaningful impact on the lives of those they serve.
- 2. Foster Donor Engagement:** Demonstrating responsiveness to donor feedback fosters a sense of partnership and investment among donors. When donors see their input translated into concrete actions, they are more likely to remain engaged with the Foundation and continue supporting its mission over the long term.
- 3. Improve Operational Efficiency:** Incorporating donor feedback into operational processes helps streamline workflows and optimize resource utilization. By identifying areas for improvement and implementing best practices, the Foundation can operate more efficiently, maximizing the value of every donation received.

Overall, the recommended actions from the survey serve as a roadmap for the Foundation's growth and success. By listening to its donors and taking proactive steps to address their feedback, the Foundation can continue to evolve and adapt in pursuit of its mission to empower and uplift the LGBTQ+ community.

The survey results are based on the responses and feedback of Foundation donors who completed the survey. Therefore, the survey provides an excellent snapshot of the perspectives and contributions of the Foundation's larger donor community.

“The Gamma Mu Foundation’s vision to ‘promote health, acceptance’, and pride in the LGBT community” is in line with my personal beliefs, especially its quest to make a positive difference in rural and underserved communities. In addition, I believe in the integrity and principles of the Board members.”

– Survey Respondent

THE PROCESS

A survey working group⁵ was formed to implement the initiative. The group developed the survey's framework and content through weekly Zoom® meetings. Critically, the survey was informed by 24 key informant interviews, ensuring it captured diverse perspectives from donors. The interview findings and survey outline were presented at the Board meeting held in Atlanta on August 14th, 2023, for additional guidance. After the meeting, the test survey was sent to the Board and Executive Committee to gather further feedback.

The survey's outreach efforts leveraged online platforms like Survey Monkey® and Constant Contact®. With 336 invitations sent via Constant Contact, a significant portion of the donor base was reached, resulting in 127 donors completing the survey, a 37 percent response rate. This completion rate demonstrates a high level of interest and commitment from the Foundation's donors. The survey was open for 11 weeks, from October 1st to December 17th, 2023, providing a suitable timeframe for donors to complete the survey, thereby ensuring extensive opportunities for their participation.

Following the initial survey release, efforts were undertaken to maximize participation. Three reminder emails, one per month, were sent via Survey Monkey to prompt those who had not completed the survey. A notice was posted on the Foundation's Facebook page, and reminders were integrated into the quarterly newsletter and fall appeal letter, ensuring continued visibility.

336 invitations sent to donors

127 or 37% completion rate

24 key informant interviews

11 weeks open survey

Finally, the personal touch was not overlooked. Beyond the initial emails, personalized engagement was pivotal in ensuring survey participation. Individual donors were directly contacted through phone calls, direct messages, and emails. By adopting this approach, participation was maximized, and the survey process was enriched by cultivating a sense of community between the Foundation and its donors.

⁵ The five person working group consisted of John Ellis, Ken Thompson, Chuck Kuglen, Dean Greeson and a consultant.

CHALLENGES AND VALUE

Implementing the survey encountered various challenges related to the Foundation's contact and data management systems. However, by embracing a collaborative approach to the survey's design and donor outreach, the working group pinpointed crucial areas for immediate improvement within the Foundation. Since the survey's completion, the working group has been working to addressing the following key management areas:

- 1. Enhanced Donor Engagement:** The initiative facilitated direct individual contact with donors, resulting in increased survey participation and, in some instances, subsequent donations.
- 2. Consolidated Contact Lists:** Efforts have been made to align Neon® and Constant Contact® for seamless email management and overall contact coordination, enhancing efficiency between the two platforms.
- 3. Improved Contact Management:** The working group has focused on streamlining a centralized contact list, simplifying removing inactive or deceased individuals. Additionally, efforts have been made to establish a follow-up contact list for event participants, creating opportunities for their transition into active donors.
- 4. Accelerated Communication Planning:** Prioritization has been given to testing and refining communication strategies to elevate donor engagement and participation, ensuring continuous improvement in planning and execution.

The Foundation has experienced immediate benefits from the survey design and implementation process, including high donor involvement, improved contact list management, and better communication planning.

DONOR PROFILE

85% *of survey respondents strongly agree/agree with the Foundation's mission statement.*

The Foundation's donors represent a diverse and devoted community spanning different ages, backgrounds, and interests. Their unwavering commitment to the Foundation's mission and the LGBTQ+ community is evident through their ongoing donations, participation in numerous in-person events, and volunteering on the Board or committees. Many donors' support is deeply personal, stemming from their own experiences or those of their loved ones, fueling their passion for the Foundation's mission. Above all, the donors value transparency and take pride in their contributions' impact on the LGBTQ+ community the Foundation serves.

When identifying the key areas of value for donors engaging with the Foundation, a significant emphasis emerged on addressing community needs while championing inclusivity and equality. According to the survey, offering scholarships or financial aid to marginalized gay men striving for higher education is a primary motivation for donations. Furthermore, empowering LGBTQ+ communities locally to tackle their unique challenges and foster resilience is an appealing factor. Underlining these motivations, many donors stated they find personal fulfillment and satisfaction through their philanthropic efforts, giving them a sense of purpose and connection to a cause they deeply care about.

The alignment between the donors' values and the Foundation's mission forms a solid foundation for continued growth and impact. By promoting inclusivity, transparency, and donor community engagement, the Foundation can further cultivate a sense of belonging and purpose among its donors, driving collective efforts towards a more equitable and empowered future for the LGBTQ+ community.

“The people... Being with people with a common mindset of wanting to help people and wanting to make a difference is nice.”

– Survey Respondent

NEW DONOR RECRUITMENT

PRIORITY 1: RECRUITMENT OF NEW DONORS IS A PRIORITY TO UPHOLD THE FOUNDATION'S EFFECTIVENESS.

82% *of survey respondents strongly agree/agree that recruiting new donors is a priority.*

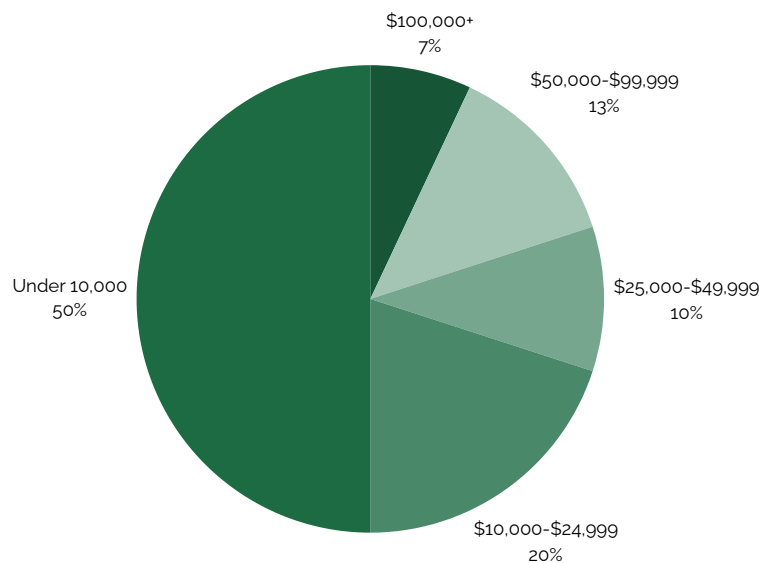
The survey reveals several key insights about the Foundation's donor base. A significant 84 percent of survey respondents are over 60 years old, reflecting the Foundation's core recurring donors' aging demographic. Moreover, only 16 percent of respondents have joined the Foundation in the last five years, suggesting ongoing challenges in new donor recruitment. Curiously, 74 percent of respondents hail from the West Coast or Southeast regions, highlighting a concentration in these areas and indicating the need to prioritize holding in-person events to target new donors from other regions to enhance geographical diversity.

DONOR CONTRIBUTIONS

A notable 20 percent of survey respondents have each contributed significantly, donating between \$50,000 and \$100,000 or more. This level of contribution demonstrates strong financial support and trust in the Foundation. Additionally, 30 percent of respondents have donated between \$10,000 and \$50,000, further underscoring their commitment. The remaining 50 percent contributed under \$10,000, illustrating a broad spectrum of support across various giving levels within the donor community. However, it is also noteworthy that only nine survey participants under 60 reported donating at least once a year, suggesting potential gaps in engagement among younger donors.

Survey respondents prefer using credit cards (38.7%) and personal checks (26.9%) for donations. Other favored methods include PayPal® and direct bank transfers. Nevertheless, the Foundation should consider incorporating online payment apps like Zelle®, Venmo®, and Apple Pay® into its donation processes to better engage younger donors, especially at in-person events. This strategy aligns with the broader trend among nonprofit organizations of adopting digital payment solutions, which offer easier and more accessible options for giving.

Q5: WHAT IS YOUR LIFETIME DONATION LEVEL?



DONOR REFERRALS

Sixty-nine percent of survey respondents were introduced to the Foundation through membership in Gamma Mu Social, emphasizing the organization's crucial role in donor recruitment. In contrast, 30 percent of respondents came to know the Foundation through a friend or partner who is a donor, with the majority of these referrals occurring among individuals aged 40 to 59. This demographic detail highlights the influential role of personal connections in expanding the Foundation's reach, particularly among middle-aged donors.

Notably, 40 percent of survey respondents are inactive members of Gamma Mu Social, indicating a potential decline in new donors from this traditional referral source. This shift underscores the need for the Foundation to develop new fundraising strategies to engage and expand its donor base beyond its established networks.

Despite these challenges, approximately 90 percent of respondents would still recommend that their friends become donors to the Foundation, highlighting strong support and belief in its mission among current donors. This high level of endorsement presents an opportunity to leverage existing donor satisfaction to attract new donors.

“There are so many interests that GM members have and a varied number of choices for giving that will help support those interests. Publicizing the good work that the GMF does might help prospective donors to choose GM over some other worthy organizations/individuals.”

– Survey Respondent

FINANCIAL RESOURCE MANAGEMENT

Nearly 90% of survey respondents are highly confident/confident in the Foundation's ability to manage its financial resources efficiently to maximize the impact of scholarships and grants

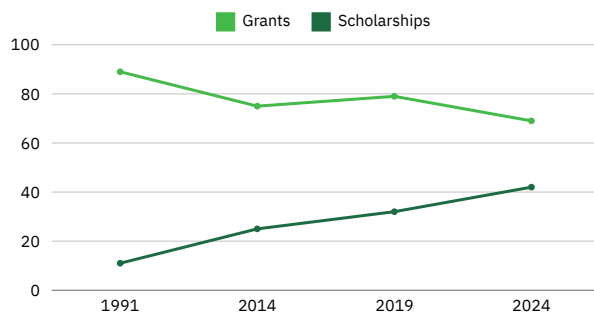
Approximately 70 percent of survey respondents agree with the Foundation's current practice of funding grants and scholarships. The Foundation primarily directs its grants towards LGBTQ+ community organizations, with criteria emphasizing rural locations and the scope of services provided. Scholarships mainly benefit gay men, but the Foundation also has established Named Scholarships specifically designed to aid students from the wider LGBTQ+ community.

Since beginning to fund scholarships in 1991, the Foundation has traditionally allocated a higher proportion of its resources to grants, with a cumulative distribution ratio of 89 percent to grants and 11 percent to scholarships. Over the years, however, this ratio has narrowed as the Foundation increased its resources and introduced the Named Scholarship Awards, underscoring a growing commitment to educational support.

About 50 percent of respondents agree with the current (2024) funding ratio, which designates approximately 60 percent of funds to grants and 40 percent to scholarships. This distribution is negotiated between the grants and scholarship committee chairpersons annually, depending on available resources and the quality of submissions. About 30 percent of respondents strongly advocate directing more resources toward scholarships, reinforcing the trend of funding more scholarships.

There is also a consensus among half of the survey participants regarding the current funding tier amounts for grants and scholarships. Yet some feedback suggests that these financial limits may need to be reevaluated to maximize the funding's effectiveness and adapt to changing needs.

Percentage of \$ Awards for Grants and Scholarships



DONOR RETENTION

PRIORITY 2: DONOR RETENTION IS ESSENTIAL FOR SECURING CONSISTENT ANNUAL FUNDING AND CULTIVATING VOLUNTEERS

Nearly **40%** of respondents do not make annual donations to the Foundation.

Donor retention is crucial for securing consistent annual funding for the Foundation and cultivating a pool of potential volunteers for roles such as board members, committee participants, and regional directors. Active donors also play a critical role as Foundation advocates, helping to recruit new donors. The survey results underscore the importance of understanding donor preferences and engagement levels to effectively sustain and expand their support.

A significant number of respondents indicated personal financial considerations as the primary reason for not donating annually. This insight highlights the opportunity for the Foundation to explore alternative ways for individuals to contribute, such as volunteer opportunities on the Board or committees and in-kind donations, which do not require financial commitments. An alternative option is for donors to volunteer their time to organize local in-person events promoting the Foundation.

Another significant observation is that some individuals prefer to support other charitable organizations with similar missions over the Foundation. This competition for donor funds indicates that the Foundation may need to enhance its visibility and appeal to recurring donors. Approaches could include:

- Clearly communicating the unique impact and success stories of the Foundation.
- Demonstrating the specific benefits and outcomes of donations.
- Engaging with donors through personalized communication and updates.

Finally, the lack of connection with the Foundation was also cited for not donating regularly. This suggests an engagement gap and relationship-building with potential and regular donors. To address this, the Foundation could:

- Increase outreach efforts to foster stronger relationships with the community.
- Implement in-person events that allow individual donors to experience the Foundation's work firsthand, such as networking events or interactive online experiences.
- Utilize storytelling and testimonials from beneficiaries to create a more emotional and personal connection with potential donors.

“My future contributions will be based on how well I know the Foundation and how effective I feel their efforts are.”

– Survey Respondent

RECURRING DONATIONS

Despite its significance, 80 percent of survey respondents had not considered recurring donations. Automatic recurring donations enhance donor retention and establish a predictable funding stream that directly monetizes the Foundation's grants and scholarship initiatives year-round. Furthermore, recurring donations help maintain stability and continuity in the Foundation's efforts to make a positive difference in the community.

For example, for over 15 years, a donor from the Bay Area has consistently contributed \$100 monthly to the Foundation, totaling \$1,200 annually. This consistent action is significant because it enables long-term planning and illustrates the tangible impact of recurring donations on the Foundation's financial stability and ability to fund grants and scholarships.

In their comments, survey respondents indicated their openness to understanding the process and benefits of recurring donations, highlighting an opportunity for the Foundation to promote this option more effectively.

Moreover, half of the survey participants are unfamiliar with the Foundation's John S. Chapman Legacy Society, suggesting an opportunity for enhanced communication and engagement emphasizing multiple giving opportunities. This repeating pattern underscores the need for the Foundation to boost its relationships with donors and articulate the impact of their contributions more consistently and clearly.

“The generosity of the members with money and time... the Board members certainly deserve the most credit for the Foundation to be as successful as it has been.”

– Survey Respondent

VOLUNTEERS

Numerous survey participants have expressed admiration and gratitude for the Foundation's entirely volunteer-based Board, believing their contributions positively impact the ability of the Foundation to serve the LGBTQ+ community.

However, the survey reveals that 70 percent of respondents have not previously served on the Board. Of those who have, 70 percent dedicated themselves to the role for more than one three-year term, indicating a notable dedication within a subset of Board members. This data implies that while there is gratitude for the commitment among a select few, there is an opportunity to involve more donors in Board and committee positions.

In addition to Board membership, over 75 percent of respondents recognize the importance of Regional Directors in promoting donor retention. These volunteer directors are crucial in improving communication with donors, coordinating local in-person activities, and ensuring follow-up with grantees and scholarship recipients. The strong support for Regional Directors underscores the donor's recognition of their role in strengthening the Foundation's outreach and communication efforts, especially in regions with fewer donors.

A review of the survey's findings highlights the top five drivers of donor retention and commitment to the Foundation, consistent with broader research in the nonprofit sector.⁶ These drivers offer a framework for enhancing donor retention through the Foundation's outreach and communication efforts.

⁶ In 2011, Donor Voice conducted a study involving more than 250 nonprofit organizations, where 1,200 long-time loyal donors were asked to rank 32 reasons for their continued support by order of relevance. Available [here](#).

Critical drivers for donors' ongoing commitment include:

- **Perceived Effectiveness:** Donors are more likely to stay committed if they believe the organization effectively fulfills its mission.
- **Gratitude:** Promptly expressing appreciation is crucial for maintaining donor support and ensuring donors feel valued and appreciated.
- **Opportunities for Feedback:** Allowing donors to express their opinions enhances their sense of involvement and value.
- **Significance of the Cause:** Donors must feel their contributions are directed toward a meaningful cause.
- **Impact Updates:** Regular updates on how contributions benefit individuals or communities help keep donors engaged.

These insights are vital for guiding the Foundation in developing fundraising and communication frameworks to enhance donor retention, fostering a stable and supportive base for sustainability and future growth.



COMMUNICATION

PRIORITY 3: A COMPREHENSIVE COMMUNICATION FRAMEWORK UNDERPINS THE EFFORTS TO EFFECTIVELY ENGAGE THE FOUNDATION'S DONORS AND COMMUNICATE THE IMPACT OF THE FOUNDATION.

Over **70%** of respondents agree that the enhanced communication efforts have improved.

Survey respondents have overwhelmingly agreed that the Foundation's communication efforts with its donors have improved following the implementation of recommendations outlined in the Freemont Report. Notably, respondents over 60 years old reported seeing a significant amount of improvement.

As the Foundation works toward implementing a comprehensive communication framework, it recognizes the importance of carefully considering communication methods that consider its long-standing donors' age, experience, and backgrounds. Striking a balance between leveraging new technology to recruit new donors and adhering to traditional communication methods is imperative for effective engagement.

Email is the preferred method for receiving updates from the Board. Additionally, donors recognize social media, the Foundation website, and regular mail as helpful communication channels. However, direct or text messages were not identified as preferred platforms for receiving updates, although this may change as new donors join the Foundation.

Since email is the preferred communication channel, the Foundation needs to understand better and take advantage of the opportunities available within its customer relationship management (CRM) platforms, namely NEON and Constant Contact. This understanding will enable the Foundation to optimize its email communication strategy and effectively engage with donors.

Eighty-four percent of respondents agree that the Foundation's website conveys essential information needed to understand its mission and impact. Conversely, constructive feedback from respondents suggests updating the website, newsletter, and other communication materials to align with current design standards, thereby conveying a compelling narrative of the Foundation's successes and impact. Recent positive feedback on the Annual Report's new design further supports this feedback.

Given their widespread popularity and influence, social media platforms like Facebook, LinkedIn, and Instagram are essential for the Foundation to extend its message outside its current donors. Among respondents, the top three platforms are Facebook (56%), LinkedIn (24%), and Instagram (15%), although 30 percent reported not using social media.

Communication Impact

- ✓ Newsletter has **496** subscribers
- ✓ Since 2019, subscriptions have grown by 131 people, a **30%** growth rate.
- ✓ Newsletter has over a **70%** open rate
- ✓ Facebook page has **382** members

“We have a very STRONG mission. We need to do a better job in spreading the good word outside of Gamma Mu.”

– Survey Respondent

By strategically leveraging these platforms, the Foundation can enhance its visibility, attract new donors, and nurture relationships with existing donors by effectively communicating its activities and impact. Therefore, harnessing the potential of social media platforms can markedly enhance the Foundation's donor outreach.

To promote the Foundation effectively, several approaches can be employed:

- **Storytelling:** Consistently sharing compelling stories of individuals whose lives have been positively impacted by the Foundation's grants and scholarship initiatives humanizes the organization's work. Personal narratives resonate with donors and help them connect emotionally to the cause.
- **Highlighting Impact:** Demonstrating the measurable impact of the Foundation's initiatives through data, testimonials, and success stories instills confidence in prospective donors and retaining current donors. Transparency regarding how donations are used and achieved outcomes builds trust and credibility.
- **Engagement and Networking:** Hosting in-person events that promote networking and educating potential donors about the Foundation's mission and uniqueness fosters community engagement and cultivates a deeper understanding of the Foundation's work. Opportunities for dialogue and networking strengthen relationships with existing donors and attract new supporters.
- **Utilizing Digital Platforms:** Leveraging social media (e.g., Facebook, LinkedIn, and Instagram), email newsletters, and the Foundation's website to share updates, success stories, and fundraising campaigns amplifies outreach efforts and engages a broader audience. Incorporating visually compelling content such as videos and infographics enhances visibility and drives donor interest.
- **Partnerships and Collaborations:** Collaborating with other charitable organizations and foundations aligned with the Foundation's mission expands reach and access to potential donors.

By effectively publicizing the Foundation's work and showcasing how donors can make a difference, the Foundation can attract donors who resonate with its mission and values. Raising awareness and promoting the Foundation's impact increases donor participation and strengthens the Foundation's ability to effect positive change within the LGBTQ+ community.

NEW DONOR WELCOME PACKAGE

Only 51 percent of respondents indicated receiving a welcome package. Notably, among those who did receive it, over 60 percent were individuals who joined the Foundation within the past 15 years. Standardizing the welcome package and its distribution emerges as a critical communication action to ensure consistency and effectiveness in donor engagement and retention.

Research⁷ indicates that donors who receive a welcome package are more likely to remain engaged with the organization over time, enhancing retention rates and encouraging continued support. It is pivotal in nurturing a sense of belonging and promoting ongoing involvement.

Receiving an initial welcome package from the Foundation is essential for several reasons. This opening touchpoint establishes a positive relationship between the Foundation and the donor. It allows one to express gratitude for their support and create a favorable impression. Secondly, welcome packages typically contain crucial information about the Foundation's mission, initiatives, and impact, aiding new donors in understanding the organization better and fostering a sense of connection to its mission. Critically, a well-designed welcome package can foster a sense of personal connection and appreciation, demonstrating to donors that their contribution is valued and that the Foundation is invested in their involvement.

Furthermore, the welcome package reinforces the Foundation's brand identity with links to the website, newsletters, and social media platforms, leaving a lasting impression on donors and helping them remember their interactions with the organization. This may include branded merchandise, such as lapel pins, or materials effectively conveying the Foundation's brand.

By standardizing the welcoming process, the Foundation can effectively convey its appreciation, provide essential information, and reinforce its brand identity, ultimately leading to greater engagement, retention, and donor support in the long run.



⁷ [Research Gate](#), [Bloomberg](#), and [NEON](#).

DONOR RECOGNITION

Recognizing donors for their financial contributions and time is pivotal in fostering a solid and enduring relationship between the Foundation and its donors. By acknowledging their generosity through various channels, such as mentions in newsletters, plaques/certificates, direct emails, and personal phone calls, the Foundation can express gratitude and promote a sense of connection among donors. This acknowledgment not only impacts donors' decisions to make contributions but also significantly contributes to donor retention.

Of the survey respondents, 78 percent reported receiving recognition for their donations, with common forms including mentions in the annual report or newsletter, receiving a plaque or certificate, or a direct email. However, only 13 percent received a phone call acknowledging their donation.

Additionally, 38 percent stated that being recognized for their donation directly impacts their decision to contribute regularly, while 46 percent neither agreed nor disagreed with this statement. Notably, respondents who have cumulatively donated more than \$25,000 are more inclined to strongly agree or agree that being recognized influences their decision to donate regularly.

Acknowledgement should also include the donors who volunteer their time on the Board or Committee; without these efforts, the Foundation could not function. Therefore, continued effective donor recognition that includes efforts that include a strong personal touch is instrumental in attracting new donors and retaining existing ones, ultimately contributing to the Foundation's continued success and impact.

Research suggests that donors who feel recognized and valued are more likely to continue their support over time,⁸ thereby enhancing donor retention rates and ensuring long-term sustainability for the Foundation's mission. This emphasis on donor recognition aligns closely with the priorities identified in the survey. By prioritizing the recruitment of new donors and emphasizing donor retention, the Foundation can lay a strong foundation for its future growth and sustainability.

Implementing a comprehensive communication framework that highlights donor contributions financially and through volunteering reinforces the sense of appreciation and value within the Foundation's donor community. As the Foundation continues to evolve and expand its reach, maintaining a culture of gratitude and recognition will be vital in fostering deeper connections with donors and securing their ongoing support.

“Perhaps a way for the board to know that those who donate appreciate all their hard work and effort. Without the board donating all of their TIME, there would be NO foundation.”

– Survey Respondent

⁸ [classy.org/blog/january-important-time-donor-retention/](https://www.classy.org/blog/january-important-time-donor-retention/)

BUILDING A COMMUNITY

In-person event opportunities form the cornerstone of the Foundation's donor engagement and community-building efforts. Donors ranked networking and socializing with others who share similar beliefs as a principal value of donating to the Foundation, which is closely behind supporting grants and scholarships.

Over 85 percent of respondents preferred participating in house parties and meeting for brunch or dinner, indicating a strong desire for informal and intimate settings. Whether it's the annual celebration event, a regional networking mixer, or a local outreach activity, each gathering provides a space for individual donors to connect on a personal level, share experiences, and forge lasting bonds.

In-person events are vital in mobilizing support and resources for the Foundation's initiatives. By showcasing the organization's work, highlighting success stories, and articulating its vision for the future, these events inspire generosity and encourage individuals to contribute their time, talents, and financial resources to further the Foundation's mission. At a recent Gamma Mu Social Spring event in San Antonio⁹, the Foundation raised over \$70,000 in new donations, with three new donors becoming Cliff Pettit Award Fellows.¹⁰

“The people and times we spend with each other. The feeling that we are doing something great for the gay community. Something we in Gamma Mu started and can be proud of.”

– Survey Respondent

Additionally, these gatherings serve as occasions for celebration and appreciation. Whether it's recognizing major donors, honoring volunteers, or commemorating milestones, in-person events allow the Foundation to express gratitude for the invaluable support of its donors and supporters.

By coordinating with local partners, these events contribute to the Foundation's visibility and reputation within the broader LGBTQ+ community. They provide excellent outreach, partnership-building, and advocacy opportunities, helping raise awareness about the Foundation's work and engage new audiences in its cause.



⁹ The Gamma Mu Social Spring event in San Antonio was held on April 10th-14th, 2024.

¹⁰ The Cliff Pettit Fellow Award is to honor donors once they have accrued \$1000 in donations.

CONCLUSION

The Gamma Mu Donor Survey Report is a testament to the Foundation's unwavering commitment to its donors and stakeholders, embodying a dedication to transparency, inclusivity, and excellence. By engaging with its donor community through this survey, the Foundation has gained invaluable insights and reaffirmed its pledge to align its efforts with donor expectations and emerging needs.

As the Annex section outlines, the actions derived from donor feedback underscore the Foundation's commitment to operational excellence and responsiveness. These actionable steps serve as a roadmap for continuous improvement, ensuring that the Foundation remains agile and adaptive in fulfilling its mission.

Moving forward, the survey highlights three key priority areas crucial for the Foundation's growth and impact:

- 1. Recruitment of New Donors:** The emphasis on expanding the donor base reflects the Foundation's commitment to broadening its support network and enhancing its effectiveness in serving the LGBTQ+ community.
- 2. Donor Retention:** Sustaining relationships with existing donors is paramount for securing consistent funding and cultivating a dedicated community of donors and volunteers.
- 3. Comprehensive Communication Framework:** Clear and effective communication channels are essential for engaging donors, conveying the Foundation's mission, and inspiring continued support.

The Gamma Mu Foundation's vision to "promote health, acceptance and pride in the LGBT community" is in line with my personal beliefs especially in its quest to make a positive difference in rural and underserved communities. In addition, I believe in the integrity and principles of the Board members.

– Survey Respondent

As the Foundation continues to evolve, guided by these priorities and insights, it remains steadfast in its commitment to fostering positive change and advancing the inclusion and well-being of the LGBTQ+ community. This commitment ensures that the Foundation remains responsive, adaptive, and effective in its mission to help create an environment that promotes health, acceptance, and pride in the LGBTQ+ community in a world where everyone can thrive authentically and without fear of discrimination.

The alignment between the donors' values and the Foundation's mission is a robust foundation for ongoing growth and impact. By championing inclusivity, transparency, and community engagement, the Foundation fosters a sense of belonging and purpose among its donors, propelling collective efforts towards a more equitable and empowered future for the LGBTQ+ community.

ANNEX I | FUNDRAISING FRAMEWORK

The Gamma Mu Foundation is at a pivotal moment, aiming to expand its donor base and amplify its impact on the LGBTQ+ community. This framework outlines key fundraising opportunities and approaches for engaging potential donors while strengthening the Foundation's donor community. Multiple touchpoints throughout the year reinforce donor connection by showing their financial contributions are valued and needed, increasing the likelihood of donor retention and keeping the Foundation top-of-mind.

STRATEGIC TIMING: DONOR APPEALS

The Foundation will conduct the following two donor appeals each year. Holding two appeals helps maintain a steady connection with donors, keeping them engaged and aware of the Foundation's ongoing activities and needs.

- **Pride Appeal:** June is a significant month for the LGBTQ+ community, marking LGBT History Month and the beginning of Pride Season. This heightened visibility and celebration period provides an exceptional opportunity for the Foundation to launch a targeted summer appeal. This strategic appeal aims to attract support from donors actively involved in or supportive of LGBTQ+ causes. The appeal coincides with a crucial financial mark—the end of the Foundation's fiscal year on June 30.
- **Fall Appeal:** The Fall Appeal will continue in November. This appeal has traditionally been the Foundation's primary fundraising activity, ensuring continuity in donations. Donors anticipate and plan for this appeal, making it a crucial part of the Foundation's annual fundraising strategy. It has established a reliable pattern, and the donors' giving cycles often revolve around this appeal.

SUSTAINING MOMENTUM: IN-PERSON EVENTS

Outside of Pride Season and LGBT History Month, visibility and fundraising for LGBTQ+ causes often decrease. Despite this natural decline, the Foundation retains a comparative advantage due to its established relationships with the Gamma Mu Social fraternity and other local LGBTQ+ groups nationwide. To further enhance the Foundation's visibility and fundraising efforts year-round, the Foundation will promote the following in-person events:

- **Gamma Mu Foundation Celebration Events:** The Foundation will hold two Celebration events. Holding an annual celebration event in mid-January in the Southeast has traditionally been a cornerstone of the Foundation's fundraising and community engagement efforts. This event not only celebrates the Foundation's growth and achievements but also serves as a platform for donors to bring friends and introduce new people to the Foundation's unique mission. To capitalize on this successful model, it is proposed that concurrent celebration events be hosted in both the Southeast and West Coast regions during the spring.
- **Gamma Mu Social Fly-ins:** The Foundation will continue coordinating with the semi-annual Gamma Mu Social Fly-ins. These events are particularly valuable in regions where the Foundation's donor presence is less established, offering a prime opportunity to broaden our donor network. For instance, the recent Fly-in held in San Antonio on April 10-14th, 2024, was a notable success, drawing in over 60 attendees and raising more than \$70,000 in new donations for the Foundation. Additionally, three new donors received the prestigious Cliff Pettit Fellow Awards at this event, further highlighting the impact and reach of these gatherings.
- **Annual Awards and Recognition Event:** It is highly recommended that an annual awards and recognition event be implemented to acknowledge the invaluable contributions of the Foundation's donors in person. Crucially, an awards and recognition event among peers is an ideal platform for reinforcing the value of each individual's involvement, building stronger personal connections with the Foundation, and ensuring long-term donor retention. Integrating this event into Gamma Mu Social Fly-ins or annual Celebration events will maximize its impact, increase attendance, and generate additional interest in the Fly-ins and Celebrations.

- **Local In-Person Activities:** Individual Foundation donors will be supported in hosting local in-person events, such as dinners, brunches, and more. These events can be independently organized or integrated into events held by local LGBTQ+ groups. Local in-person events offer an ideal opportunity to introduce the Foundation's work and impact to a new audience. Personal interactions and engagement are powerful ways to add value by creating a sense of community, fostering a deeper connection with potential donors, and ultimately strengthening the Foundation's impact.

FOUNDATIONS FOR THE FUTURE: LEGACY, RECURRING GIVING AND CAMPAIGN INITIATIVES

The Legacy Society, recurring giving, and social media campaigns are crucial initiatives for the Foundation's future because they provide complementary strategies for ensuring long-term sustainability and growth. The Legacy Society secures financial stability through planned gifts and bequests from dedicated donors, guaranteeing that the Foundation can continue its impactful work well into the future. Concurrently, social media campaigns enhance visibility, engage new and existing donors, and drive fundraising efforts by leveraging the reach of digital platforms. Together, these initiatives build on the Foundation's resilient donor network, promoting its exceptional work.

- **John S. Chapman Legacy Society:** The Foundation will actively promote the John S. Chapman Legacy Society, which acknowledges donors who include the Foundation in their estate plans. This society honors deceased and living members who intend to support the Foundation through bequests or other planned gifts. These pledges are crucial for the long-term growth and sustainability of the Foundation's mission, ensuring it can continue its impactful work well into the future.
- **Recurring Giving:** Promoting recurring giving is essential because it provides a steady and predictable income stream, allowing for better financial planning and program sustainability. It also enhances donor retention, as recurring donors tend to stay engaged longer and contribute more over time than one-time donors. Additionally, recurring giving builds a stronger relationship with donors, fostering a sense of ongoing partnership and a more profound commitment to the Foundation's mission.
- **Social Media Campaigns:** The Foundation will explore the potential of implementing three social media campaigns targeting new donors. The value of these campaigns lies in diversifying funding channels, adding new donors to the Foundation's database, and advocating its mission and impact on the LGBTQ+ community.
 - The first is the [#GivingTuesday](#) Campaign, held each year on the Tuesday after Thanksgiving (December 3, 2024). Since 2012, Giving Tuesday has grown into a crucial fundraising event for charitable organizations nationwide, offering an opportunity to gain visibility, attract new donors, and engage with supporters interested in making a more significant social impact.¹¹
 - Linking with [#GiveOUTDay](#), this is the only national LGBTQ+ giving event that supports projects, community groups, and not-for-profit organizations within the LGBTQ+ community. In 2024, Give OUT Day starts on Wednesday, May 1, and culminates on Thursday, May 30. Since its inception in 2013, Give OUT Day has helped hundreds of LGBTQ+ nonprofits raise millions. Last year alone, over \$1.2 million was raised.
 - The third campaign is to brand and implement a 626 Social Justice Campaign¹² ([#GammaMu626](#)). Funds raised from this one-of-a-kind campaign will be earmarked for a named scholarship award to support university students concentrating in law, social work, and public service that may benefit the LGBTQ+ community. The goal of the campaign will be to secure donations from 626 individuals. An additional incentive can be \$60,026 matching contributions if the number of donations is achieved.

¹¹ bloomerang.co/blog/givingtuesday/

¹² This concept is based on the [#Wabash430](#) campaign.

626 stands for June 26. This date is significant for the LGBTQ+ community of the following US Supreme Court rulings:

- **June 26, 2015:** The US Supreme Court ruled in Obergefell v. Hodges that same-sex marriage is a constitutional right nationwide.
- **June 26, 2013:** The US Supreme Court ruled in United States v. Windsor that the Defense of Marriage Act (DOMA) is unconstitutional, allowing federal recognition of same-sex marriages.
- **June 26, 2003:** The US Supreme Court ruled in Lawrence v. Texas that laws criminalizing consensual same-sex sexual conduct are unconstitutional.

LEVEL OF EFFORT

The level of effort for the above fundraising activities varies. For instance, the Foundation will directly implement donor appeals twice a year. While the Fall Appeal process is well established, the Pride Appeal will require different messaging to align with the Pride season.

For In-person events, the Foundation will directly organize the two Celebration events held in the spring, building on the established Celebration model. The Fly-ins and local events are organized by Social and local partners. The Foundation's role will be to coordinate and promote these events with its Donors.

Promoting the John S. Chapman Legacy Society and Recurring Giving option can be automated through a NEON Workflow. Different email content and text are featured each quarter, and the email dates and text can be scheduled in advance.

The Foundation will participate in two national online fundraising campaigns through its email distribution list and social media channels. Messaging for both campaigns can be designed in the quarter preceding each campaign.

The 626 Social Justice Campaign will require the highest level of effort. The Foundation will brand and implement this campaign through email, social media, and donor networks. A working group should be established to design the rollout and campaign messages.

ANNUAL FUND RAISING CALENDAR (WITH TARGETS)

Fund Raising Activities	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
Donor Appeals		1		1
Social Fly-ins		1		1
Celebrations	2			
Local Events	1	1	1	1
Legacy/Recurring Giving Promotion	1	1	1	1
Online Campaigns		2		1

Total online/mail appeals: 2

In-person events: 8

Promotion Communication: 4

Online Campaigns: 3

ANNEX II | COMMUNICATIONS FRAMEWORK

An integrated communications framework is vital for the Foundation, ensuring clarity and consistency in messaging while effectively engaging its donor community and building trust through transparency. These efforts raise the Foundation's profile among potential donors and encourage local LGBTQ+ organizations and students to apply for funding. By focusing on transparency, storytelling, and demonstrating the impact of contributions, the Foundation can communicate its impact, foster a connection with donors, and enhance its fundraising efforts. A multi-layered and adaptable communications framework empowers the Foundation to achieve its mission by distributing impactful stories and fostering a committed community.

LEVERAGING ONLINE RESOURCES

The Foundation will maximize its online presence to enhance its ability to communicate its mission and impact, benefiting from increased visibility and engagement from new donors, local LGBTQ+ applying for grants, and scholarship candidates. This includes updating its website and social media accounts and integrating them with the Foundation's CRM platform.

- **Website:** The Foundation will review and update its website, ensure its integration with the NEON CRM, and utilize current design best practices. The website should be the central hub for all information about the Foundation, including its mission, grant and scholarship programs, impact stories, news, and events. It should be easy to navigate, with clear sections for donors, grantees, scholarship applicants, and volunteers. Engaging content such as videos, infographics, and testimonials should be included to highlight the Foundation's impact. Prominent calls to action, such as "Donate Now," "Apply for a Grant or Scholarship," and "Join Our Community," should guide users toward meaningful engagement. A routinely updated "What's New" news section should share updates, success stories, and upcoming events.
- **Social Media Platforms**
 - **Facebook:** The Foundation should continue promoting its Facebook group page to highlight social activities and community engagement by posting updates about events and social gatherings. Sharing photos and videos will help create a sense of connection among the Foundation's donors. Opportunities for followers to share their experiences at the Foundation events and engage with posts through likes, comments, and shares should be encouraged. Additionally, including links to the Foundation's website in posts will drive traffic for more detailed information. [[Link](#)]
 - **LinkedIn:** The Foundation can use LinkedIn to focus on professional engagement with donors, grantees, and scholarship winners by sharing updates such as grant announcements, success stories of scholarship recipients, and insights from board members. It can facilitate networking by connecting with donors, LGBTQ+ nonprofit organization, and alums to raise the Foundation's profile. LinkedIn articles and posts can also drive users to the Foundation's website for detailed information and further engagement. [[Link](#)]
 - **Instagram:** Instagram should be used to highlight stories and key data and impact stories through visual content. Photos, infographics, and short videos can share success stories and event highlights, while Instagram Stories and Reels offer interactive and engaging content. Sharing impactful visuals and stories will show how donations make a difference. Followers should be encouraged to use foundation-related hashtags and share their own stories. Including website links in the bio and directing followers to the website will provide more comprehensive content and actions.

REPORTING AND STORYTELLING

To effectively organize and present the Foundation's fundraising and donor engagement efforts, it is crucial to prioritize transparency and storytelling. This approach highlights the Foundation's impact, fostering donor trust and building connections. By implementing the key actions below, the Foundation can clearly convey its mission and impact, demonstrate its value to the LGBTQ+ community, and build long-term connections with its donors.

- **Annual Report:** Building on the recent design update, the Annual Report summarizes the Foundation's activities, financial health, and impact over the past year. Opening with a letter from the President sets a tone of gratitude, growth, and transparency. Detailed sections include overviews of grant and scholarship programs, financial statements, and clear data visualizations. Narratives highlight key achievements and challenges, interwoven with personal stories and testimonials from grant recipients, scholarship awardees, and donors. These stories add a human element, making the report more engaging and relatable. Distribute this report by uploading it to the Foundation's website, emailing it to donors, promoting it through social media, and providing printed copies at in-person events.
- **Quarterly Newsletter:** The Quarterly Newsletter has been central to keeping the Foundation's donors engaged. It includes updates on the Foundation's work, brief financial updates, and links to recent event posts or social media highlights. Storytelling should be a core element, with success stories, interviews, and personal anecdotes illustrating the Foundation's impact. Emphasizing how donor contributions have supported these initiatives is essential. Distribute the newsletter through email to subscribers, promote it through the Foundation's social media channels, and post it on the Foundation's website and social media channels.
- **Reports:** The revised website should feature a dedicated resource page to host reports and impact results. In 2024, the Foundation conducted a Donor Survey to gather feedback for improving fundraising strategies and donor engagement. This report provided an overview of the survey methodology and respondent demographics, ensuring transparency in collecting and analyzing feedback. Key findings and recommended actions were derived from the survey results, with quotes from respondents adding a personal touch to demonstrate that donor voices are heard and valued. The survey results and recommended actions should be emailed to donors, promoted through the Quarterly Newsletter and social media, and made accessible on the website.
- **Grantee and Scholarship Awardee Questionnaires:** These results are essential for assessing the impact of grants and scholarships on recipients. Compile responses from grantees and scholarship recipients, including impact stories and case studies. Present quantitative data on outcomes, such as academic achievements and community projects, transparently completed with clear visuals to aid understanding. Results may include recommendations for the Foundation to improve its outreach and selection process. Review these findings internally by the Foundation's board and staff and summarize them in the annual report and quarterly newsletters. Demonstrate how donor contributions have enabled these successes to reinforce their impact.
- **Articles from Events and Campaign Results to be Posted through Social Media Channels:** The consistent release of articles is crucial for highlighting successful events and promoting future activities. Provide recaps of event highlights, including photos and videos, participant quotes and testimonials, and acknowledgments of donors and key milestones. Include information on upcoming events and how to get involved. These posts can expand their reach and engagement by using key hashtags, tagging, and mentioning relevant stakeholders. Consistent storytelling across these articles can help build a narrative of the Foundation's ongoing impact and donor involvement. Clearly, showing how donor participation has facilitated these events is essential for maintaining transparency and trust. Articles promoted through the Foundation's social media channels and posts can also drive readers to its website for detailed information and further engagement.

ANNEX III | MANAGEMENT & OPERATIONS FRAMEWORK

The Foundation is committed to continuously learning and improving its management and operations processes to enhance efficiency and effectiveness. By refining internal management and optimizing task distribution, the Foundation aims to better serve the LGBTQ+ community, ensuring sustainable impact and building a culture of participation and transparency. The following recommended actions focus on leveraging the strength of the Foundation's CRM and online platforms, building on current management practices, and effectively utilizing the Board's capacity.

BOARDS AND COMMITTEES

Volunteerism is a core strength and value of the Foundation. The Foundation will continue to promote opportunities and actively recruit Board and Committee members from its donor community. Identifying individuals with specific backgrounds or skill sets that can add value to the team is crucial. In addition to the current Board and Committees, the Foundation can set up the following to further strengthen management and share the level of effort:

- Form teams to manage activities, add a social element, and provide giving back opportunities for the Foundation's donor community. This approach will create a structured philanthropic environment where donors can engage with the Foundation's mission and contribute to specific initiatives. It also offers donors valuable opportunities to network with like-minded individuals, learn about social-impact strategies, and directly help improve the lives of LGBTQ+ people, thereby enhancing their overall experience and commitment to the Foundation.
- Convene a fundraising team to design and implement online campaigns is recommended. Donors with marketing and design experience will be particularly beneficial in fully realizing the potential of these online campaigns.
- Define and recruit five regional directors from the Foundation's donor community.

DONOR DATABASE AND CONTACT MANAGEMENT

The Foundation subscribes to NEON CRM and Constant Contact to manage its donors and contact information. Efforts should be made to better understand and utilize the features of these platforms to increase efficiency and enhance donor experience. The following actions should be considered:

- Create the following three NEON Workflows to automate communication and actions:
 - New Donations (i.e., new donors vs. recurring donors)
 - Cumulative Giving Milestones
 - Event Participant Follow-up
- Ensure NEON CRM is integrated with the revised website to better facilitate online donations, contact management, and event registration.
- Train multiple Board Members in the management functions of NEON CRM to ensure tasks can be effectively shared.
- Review and sync donor and event participant contact lists between NEON and Constant Contact once per quarter or as needed.
- Develop a web-based welcome package that introduces the Foundation's mission and brand identity, including links to the website, newsletters, and social media platforms.

GRANTS AND SCHOLARSHIPS MANAGEMENT

The Foundation's primary mission is to raise and distribute funds through grants and scholarships, providing essential financial support to LGBTQ+ organizations and individuals. By strategically allocating these funds, the Foundation empowers recipients and fosters a stronger, more resilient LGBTQ+ community. The following recommended actions are based on the insights gained from the Foundation's experience and best practices in small grant management.

- Evaluate the current distribution methods for grant calls for proposals and scholarship application notifications. Use these insights to revise the announcement process to attract more diverse and technically proficient applications.
- Consider hosting a pre-submission webinar for prospective organizations interested in submitting a grant proposal. This will allow the Foundation to clearly communicate expectations and provide an opportunity for organizations to ask questions about the submission process. This step may also help smaller organizations submit more technically sound proposals.
- Post the scope of proposals on the website without identifying a focus area. This approach will encourage more diverse and innovative proposals. Traditionally, proposals submitted for evaluation and potential funding fit into one of three program categories with revised text:
 - **Community Support Services:** Programs proposed to meet the needs of underserved LGBTQ+ populations, such as young people, seniors, and victims of domestic violence, and promote empowerment and inclusivity.
 - **Public Education and Research:** Initiatives designed to increase awareness and understanding of LGBTQ+ issues, foster a more inclusive environment for the community, and establish a foundation for evidence-based advocacy.
 - **HIV and Health Initiatives:** Interventions designed to meet the needs of persons, caregivers, and families impacted by HIV and other health conditions (e.g., aging and mental health), including support and educational activities.
- Develop a more comprehensive monitoring and data collection process for grantees and scholarship awardees. Enhanced data will enable the Foundation to better assess the impact and enrich communication efforts.
- Review previous grant scoring methods and select one as the standard. This will ensure a consistent approach for all scorers and allow new grant committee members to be effectively trained on the process, maintaining consistency in the future.

- Agree on and clearly outline the Foundation's scholarship application and grant submission criteria on the website. By specifying these criteria, the Foundation ensures transparency and sets clear expectations for all applicants. This approach also helps manage the Foundation's resources efficiently, aligning with its mission to support the most deserving submissions. Below are some areas that need to be clarified:
 - **Update Scholarship Criteria:** Clearly note the opportunities for students attending vocational schools and entering their first year of college or university.
 - **Annual Budget Limit:** Establishing an annual budget limit for an organization ensures equitable distribution of funds and supports a diverse range of recipients. Clearly state this limit in the grant application guidelines to prioritize smaller, under-resourced organizations, providing significant impact.
 - **Government Department Eligibility:** Decide if government departments are eligible for grants by establishing clear eligibility criteria. Explicitly state whether government entities can apply for funding to ensure transparency and clarity for all applicants. Including this information in the application, guidelines helps manage expectations and allows the Foundation to focus its support on intended recipients, such as nonprofit organizations, community groups, or educational institutions.
 - **Allocation Percentage:** Establish clear funding guidelines to determine what percentage of the requested amount should be allocated to the specified activity. Outline the minimum and maximum percentages of grant funds for core activities to ensure significant support for the intended impact.
 - **Cumulative Awards:** Establish guidelines specifying the maximum number of grants an organization can receive over a defined period. This ensures equitable fund distribution and supports a broader range of recipients. Setting these limits also encourages organizations to seek diverse funding sources and fosters a competitive application process.



ANNEX IV | GAMMA MU FOUNDATION BUSINESS PLAN SUMMARY (FREEMONT REPORT)

The full report is available [here](#).

GOALS

Goal 1: Amplifying Outreach and Communication

The Gamma Mu Foundation (Foundation) is committed to effectively communicating its mission and impact to the LGBTQ+ community.

- 1. Engaging New Donors:** On its website, social media platforms, and public media channels, the Foundation aims to reach 1000 individuals not currently affiliated with the Foundation. This outreach will be inclusive, targeting new donors with diverse skills, ages, backgrounds, and locations. We will diligently track the number and demographics of those contacted as a performance indicator.
- 2. Connecting with Gamma Mu Foundation Donors:** The Foundation will establish direct communication with our 400+ donors through email, mail, and in-person networking opportunities at fly-ins. These interactions will foster stronger connections and engagement within our donor community.
- 3. Establishing a Communications Committee:** The Foundation will establish a dedicated Communications Committee to achieve these objectives. The committee will strategize and implement initiatives to enhance its outreach efforts and ensure effective communication across all channels.

Goal 2: Nurturing Donor Engagement

The Foundation recognizes the importance of fostering meaningful connections with donors and volunteers. Its goals include:

- 1. Securing Recurring Donations:** We aim to secure recurring or multiyear donations from at least 50 donors annually, ensuring sustainable financial support for our initiatives.
- 2. Engaging Leadership:** We will actively engage at least 30 individuals each year to serve in leadership positions on the board, committees, or regional directors. These roles drive our organization's strategic direction and foster community engagement.
- 3. Establishing a Development Committee:** The Foundation has established a dedicated Development Committee to achieve these objectives. This committee will focus on cultivating relationships with donors, identifying new donor opportunities, and nurturing leadership talent within our community.

Goal 3: Increasing Funding For Grants and Scholarships

The Foundation is committed to mobilizing donations to support innovative programs and individuals through grants and scholarships. Our objectives include:

- 1. Reviewing Applications:** We will review at least 100 scholarship and 60 grant applications annually, ensuring thorough consideration of each submission.
- 2. Awarding Scholarships and Grants:** We aim to award 20 scholarships and grants annually, benefiting more than 1000 individuals collectively. These awards will support individuals pursuing educational opportunities and innovative projects.

STRATEGIES

Strategy 1: Engage Foundation Donors and Expand Membership

- **Donation Outreach:** Utilize annual reports, quarterly newsletters, the website, social media platforms, and networking opportunities at Gamma Mu Social fly-ins to encourage new donors to contribute to the Foundation.
- **Regional Directors:** Introduce regional directors in cities to enhance communication, support, and donor recruitment efforts.

Strategy 2: Expand Outreach to New Donors and Partnerships

- **Non-Members Engagement:** Reach out to potential allies, event participants, and Gamma Mu Social Members who are not currently donors, fostering new networks and donors.
- **New Membership Policy:** Develop and implement a policy for accepting new members to the Foundation, widening the Foundation's reach and impact.

Strategy 3: Enhance Engagement with Existing Members

- **Member Assessment:** Regularly assess foundation members' satisfaction and engagement levels through yearly questionnaires.
- **Fundraising Goals:** Set a target of raising \$1 million in donations over the next five years, initiating the annual GMF Cliff Petit Fellows retreat, and implementing peer-to-peer outreach to major donors.

Strategy 4: Achieve Financial Management and Investment Growth

- **Revenue Growth:** Aim to grow revenue annually by at least 10 percent while ensuring responsible financial management.
- **Endowment Spending:** Allocate at least five percent of the total endowment for grants and scholarships each year, inviting current donors to invest and renew donations totaling \$200k annually.

Strategy 5: Strengthen Grant and Scholarship Processes

- **Maximize Impact:** Focus on maximizing the impact of grants and scholarships awarded, aiming to award at least \$200k annually or \$1 million over five years.

Strategy 6: Improve Information Technology Infrastructure

- **Maintain Current IT Systems:** Ensure the upkeep of existing technology, including the website, database, grant, scholarship, and financial management software.
- **Adopt New IT Solutions:** Develop and implement new IT tools to upgrade and improve the technology infrastructure, prioritizing adaptability, segmentation, sorting, and personalization capabilities.
- **Provide Training and Support:** Offer training, support, and orientation to staff and volunteers involved in working with the information technology system, ensuring efficient utilization and optimization of resources.

GET IN CONTACT

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