

Progress Update

Introduction

In 2023, the Gamma Mu Foundation conducted a comprehensive donor survey to gain a deeper understanding of its supporters' priorities, perspectives, and experiences. Paired with insights from one-on-one interviews, the final report offers a detailed analysis that highlights the Foundation's strengths, identifies areas for growth, and uncovers key opportunities to advance its mission.

From this analysis, three strategic focus areas emerged: **strengthening the fundraising framework, enhancing communications, and improving overall management and operations.** The recommendations within these areas are designed to expand the Foundation's donor base, deepen engagement, foster transparency, and establish a more efficient and sustainable infrastructure. Collectively, they provide a roadmap to ensure the Foundation remains responsive, impactful, and well-positioned to meet the evolving needs of the LGBTQ+ community it serves.

In August 2024, the Gamma Mu Foundation Board authorized the President to negotiate with the consultant [Edmund Settle] to support the Board and its committees in implementing the key recommendations from the report. This collaboration is designed to ensure that the Foundation advances with a thoughtful, strategic, and well-supported process. The recommendations, along with the proposed steps toward implementation for each area, are detailed in the attached document.

Implementation Strategy

Over the past 12 months, Edmund has used the recommendations outlined in the donor survey report (pages 23–30) as a strategic framework to guide his support to the Board and its committees. A key achievement has been ensuring that progress across the Foundation's strategic focus areas is aligned and mutually reinforcing. **Rather than addressing each area in isolation, his efforts have supported an integrated approach in which each initiative strengthens the others, collectively advancing the Foundation's mission.** Notably, Edmund actively involved Board members and donors throughout this process, helping to build internal capacity, foster a greater sense of ownership, and highlight the leadership of the donor community in shaping the Foundation's future.

I. Fundraising Framework

The Foundation prioritized the implementation of donor survey recommendations, focusing on fundraising with a particular emphasis on **in-person engagement and transparent communication of outcomes.**

- **Celebration Events:**

In response to survey recommendations, the Foundation launched its inaugural Celebration West | Palm Springs in 2025, complementing the long-standing annual Celebration in Fort Lauderdale. These events provided vital touchpoints with donors, enhancing engagement and visibility.

Communications and Impact:

To showcase the success of both events and reinforce the Foundation's commitment to transparency and donor recognition, the outcomes were widely shared across multiple platforms, highlighting community engagement and celebrating impact. Communications included:

- Stories and photos featured on the Foundation's website
- Two email newsletters highlighting key moments and outcomes
- A targeted email campaign focused on the results of both Celebrations
- A Facebook post with numerous photos showcasing participation in various celebration activities

- **Businessmen's Luncheon at Spring Fly-In:**

During the Gamma Mu Spring Fly-In in Sarasota, the Foundation hosted a Businessmen's Luncheon, highlighting:

- Progress "By the Numbers"
- Recognition of leadership, including the launch of the Cliff Pettit Founder Award
- Induction of new Cliff Pettit Fellows

Communications and Impact:

To highlight the success of the Businessmen's Luncheon and recognize donor support, a coordinated post-event communications effort was launched, reflecting strong engagement and broad community support for the Foundation's mission. Outreach included:

- Targeted campaigns via Constant Contact and Facebook, which generated contributions from 40 individual donors in support of the newly launched Cliff Pettit Founder Award.
- A comprehensive list of over 700 Cliff Pettit Fellows was unveiled at the luncheon and later shared through newsletters and direct email outreach.
- Photos and event highlights featured on the Foundation's website, newsletter, and Facebook, extending its impact beyond the attendees.

Result: These in-person events underscored the power of gathering together, drawing over **250 attendees**, raising nearly **\$100,000**, and honoring **17 new Cliff Pettit Fellows**. The strong turnout and generous support reflected the deep sense of shared purpose that in-person engagement continues to inspire within the Foundation's community.

- **Matching Gifts Program** (*Thanks, Ross L, for bringing this opportunity forward.*):

Although not initially included as a recommendation in the donor survey, the Foundation identified employer matching gift programs as a valuable, untapped opportunity for increasing support. This includes programs that extend to retired employees.

Platform Integration:

To streamline the matching process and improve donor experience, the Foundation:

- Integrated its NEON CRM with the Double the Donation platform
- Established profiles on six major Corporate Social Responsibility (CSR) platforms used by employers to route matching funds to nonprofits

Digital Tools and Donor Experience:

The Foundation implemented new digital tools to simplify the matching gift process:

- A dedicated Matching Gifts webpage, where donors can search for their employer's program
- An enhanced donation page, with a field for entering the donor's company name
- An automated email sequence that walks eligible donors through the matching gift submission process

- These updates were designed to maximize the impact of each contribution and improve the ease and accessibility of participation.

Together, these efforts reflect significant progress in strengthening the Foundation's fundraising strategy and deepening donor engagement. Guided by survey-informed recommendations and donor feedback—such as launching new events, celebrating donor leadership, expanding digital outreach, and integrating matching gift tools—the Foundation has enhanced transparency, increased visibility, and built a more connected and responsive donor community. These actions lay a strong foundation for sustained growth and the continued advancement of its mission.

II. Communications Framework

An integrated communications strategy is essential to advancing the Foundation's mission. It ensures consistent messaging, promotes transparency, and fosters meaningful engagement with donors and stakeholders. By **emphasizing storytelling and demonstrating impact**, the Foundation not only strengthens donor relationships and attracts new supporters but also makes the donor community feel informed, valued, and part of the story. Through a multi-channel approach including its new website, updated newsletters, social media, and impact reports, the Foundation maintains its community's connection and active involvement in its ongoing work. This integrated approach helps build awareness, reinforce credibility, and strengthen engagement across all communication channels.

Website Enhancements

- Recently redesigned using modern best practices and fully integrated with:
 - NEON CRM
 - Constant Contact
 - Foundant
- Serves as the Foundation's digital storefront and primary public-facing platform.
- Frequently linked in newsletters and social media, helping introduce new audiences to the Foundation.

Clearly presents

- The Foundation's mission
- Donor information (how to give, giving levels)
- Key donor programs:
 - Cliff Pettit Fellows Program
 - Legacy Society
 - Matching Gifts Program

Engaging the Donor Community

- The Events and Activities page highlights recent in-person gatherings and Celebrations.
- Events bring people together around a shared purpose and offer updates on the Foundation's progress.
- Recognizes inspiring individuals and leadership within the donor community.
- Articles and photo galleries:
 - Communicate impact
 - Strengthen community bonds
 - Extend the reach of each event

Grants and Scholarships

To increase transparency and accessibility, the Foundation updated its Grants and Scholarships pages to better serve prospective applicants. Key improvements included:

- Clear articulation of eligibility criteria and application guidelines
- Detailed explanation of the review and selection process
- Enhanced layout and navigation for a more user-friendly experience

These updates to the grants and scholarship pages contributed to:

- An increase in the number of applications submitted
- A noticeable rise in the quality, relevance, and innovation of proposals
- Stronger alignment between the applicant goals and the Foundation's mission

Website Traffic Snapshot

These numbers reflect **strong and growing interest** in the Foundation's programs, particularly our grants and scholarships.

Total Visitors: 11,569 Total Page Views: 22,843 Desktop: 74% Mobile: 26%	Home Page: 6,413 Grants Page: 5,575 Grants/Scholarship: 4,091 Scholarship Page: 4,032 About Page: 1,252	March was our busiest month, with 8,265 visits.
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Newsletters and Email Blasts

The Foundation uses Constant Contact to deliver quarterly newsletters and targeted email blasts to a growing list of over **700 subscribers**, including donors, grant recipients, and scholarship awardees, with an impressive **open rate of over 72% and click rate of 11%**. These contacts are regularly synced with the Foundation's NEON CRM donor database, ensuring accurate, up-to-date engagement across all platforms.

- **Quarterly newsletters** highlight recent activities, feature grant and scholarship recipients, and recognize donor contributions.
- **Email blasts** are used for timely, topic-specific outreach, such as sharing key outcomes from events or campaigns.
- **Promotion** of the grant call for proposals and webinars

One recent example: an email promoting the launch of the Cliff Pettit Founder Award led to **40 donor contributions**, demonstrating the impact of strategic, well-timed communications.

Social Media

A growing social media presence is vital for increasing the Foundation's visibility, reaching new audiences, and deepening engagement with current supporters. These platforms allow the Foundation to share its impact in real time, celebrate donor and recipient stories, and attract interest from potential donors, partners, and applicants—ultimately advancing its mission and expanding its reach.

- **Facebook (348 followers)** highlights **social events and in-person activities**, sharing stories, photos, and announcements for upcoming events.
- **LinkedIn (23 followers)** is a newly created account used to showcase the Foundation's core programs - grants and scholarships - while amplifying the achievements of grantees and scholarship recipients in a professional context.
- **YouTube** features videos of personal stories and testimonials that can be embedded in emails, newsletters, and the Foundation's website. While currently underutilized, this platform **holds strong potential** for expanding outreach and storytelling.

The Foundation's revitalized communications framework—integrating web-based tools such as its redesigned website, NEON CRM, Constant Contact, and social media platforms—has created a stronger, more connected donor community. By modernizing its approach, elevating storytelling, and promoting transparency, the Foundation has not only expanded its reach but also deepened engagement across all audiences. Donors are not only able to **see the impact of their support**, but also to **actively participate** in the Foundation's work and **be part of the Gamma Mu story**—a story defined by shared purpose, lasting impact, and a growing community committed to advancing equity, opportunity, and meaningful change within the LGBTQ+ community.

III. Management & Operations

The Foundation is committed to strengthening its management practices to enhance efficiency, transparency, and impact. By optimizing internal systems and leveraging CRM and online tools, the Foundation can better serve the LGBTQ+ community and utilize its Board capacity more effectively.

Donor Database and Contact Management

The Foundation has strengthened its contact management practices to ensure accurate, timely, and personalized engagement with its community of supporters.

- Contact lists in NEON CRM and Constant Contact are synchronized at least twice per year.
- Redundant or inactive donor records have been removed to maintain clean, up-to-date databases.

NEON CRM Workflows

Customized workflows were developed and implemented to automate key communications and improve donor engagement:

- New donation alerts, distinguishing between first-time and recurring donors, including the delivery of a digital welcome package to first-time donors.
- Acknowledging cumulative giving milestones, with reminders to send personalized thank-you messages.
- A web-based welcome package introducing the Foundation's mission and brand identity, with links to the website, newsletters, and social media platforms.

Website integration

- The NEON CRM is fully integrated with the Foundation's updated website to streamline online donations and contact management.
- Event registration is now managed through Constant Contact, allowing for clearer tracking of contributions versus event fees.

Grants and Scholarships

The Foundation's core mission is to raise and distribute funds through grants and scholarships, providing critical support to LGBTQ+ individuals and organizations. By strategically allocating resources, the Foundation empowers its recipients and strengthens the resilience of the LGBTQ+ community.

The Foundation has taken several steps to improve the accessibility, clarity, and inclusivity of its grants and scholarships processes:

- **Refined Communication Channels:** The Foundation reviewed and improved its outreach strategy for grant announcements to attract a more diverse and technically proficient pool of applicants. As part of this effort, an email notification about the call for proposals was sent to all previous grant recipients from the past 10 years, resulting in broader visibility and stronger, more competitive submissions.
- **Hosted Two Pre-Submission Webinars:** To support prospective applicants, the Foundation organized a pre-submission webinar for organizations interested in applying for grants. This session provided an overview of expectations, clarified the submission process, and offered a forum for Q&A. As a result, participating organizations—especially smaller ones—were able to submit more competitive and technically sound proposals.
- **Published Open Proposal Scope:** The scope of funding opportunities is now published on the Foundation's website without listing a fixed focus area. This open approach encourages innovative proposals across a broader range of needs while continuing to prioritize our three core program categories:
 - **Community Support Services:** Supporting underserved LGBTQ+ populations such as youth, seniors, and victims of domestic violence through programs that promote empowerment and inclusion.
 - **Public Education and Research:** Advancing awareness, understanding, and evidence-based advocacy on LGBTQ+ issues.
 - **HIV and Health Initiatives:** Addressing the needs of people affected by HIV and other health conditions, including aging and mental health, through education and support.

These enhancements have strengthened the Foundation's grantmaking and scholarship processes, expanding access, encouraging innovation, and ensuring that funding reaches a diverse range of LGBTQ+ individuals and organizations with the greatest potential for impact.