

Fred Says



STRATEGIC FRAMEWORK
APPROVED JULY 2022

Organizational Summary

Founded in 2012 by Dr. Robert Garofalo and his dog, Fred, **Fred Says** is a 501 (c) 3 organization providing funding to organizations that support young people living with or impacted by HIV throughout the United States and internationally. Dr. Garofalo is a physician who has devoted his career to the care of HIV+ young people. Diagnosed with cancer in 2009 and then HIV in 2010, Dr. Garofalo was going through the darkest period in his life. In January 2011, Rob adopted Fred. Fred helped Rob heal from his own HIV+ diagnosis creating a space for peace and joy in his life.

Organized to raise awareness and funding for HIV impacted young people, Fred Says developed the book *When Dogs Heal*, which was published in 2021 and captures an untold side of the HIV experience, highlighting love, joy, and survival of countless people who've been lifted from despair by the love of a dog. Further, *When Dogs Heal* gives a true voice to those living with HIV, puts power back into an experience that has been burdened with stigma for far too long, and shines a light on the incredible healing power of the dog/human bond.

Through both funding and awareness building, Fred Says has marshalled modest resources to support its mission. This work has been achieved largely through volunteers. Governed by an agile board of directors who have deep commitment to the work of Fred Says, the organization has operated modestly and consistently sought to have a lean, volunteer-led operation without administrative overhead with resources being directly allocated to organizations serving young people.

Current State

After many years of independently-led fundraising and a partnership with Stonewall Sports, Fred Says finds itself at a crossroads. In August 2021 Fred died, inspiring a major, multi-year contribution from a long-time benefactor. Fred's life was a vital reminder and linkage to the work of Fred Says and through this investment, the organization seeks to honor and expand that legacy.

The inaugural grants from this new pool of funding distributed \$200,000 to ten organizations throughout the United States and in Africa. These grants were substantially greater investments than previous distributions.

With this context, Fred Says endeavors to take some time to reflect on a period of **organizational growth**, mindful that the next 3-5 years may bring about dynamic change from this influx of capital. Engaging a consultant to develop a Strategic Framework, Fred Says sought to invite stakeholders in conversation to better inform this planning process.

Desired State

Fred Says seeks to continue being a leading, transformative, and nimble funder in support of young people infected or impacted by HIV. More specifically, over these next 3-5 years, Fred Says seeks to invest most deeply in organizations serving and advocating for Transgender young people and organizations working internationally with HIV impacted youth.

Moreover, Fred Says seeks to remain nimble, responsive, and proactive in its approach to grant making; investing in leaders and knowledge partners to make the best and most informed decisions on how to use allocated funding. While many philanthropic Institutions continue to restrict contributions programmatically, Fred Says seeks to be a thought partner with its grantees by providing them with flexible capital to achieve their missions.

It is intended that Fred Says will annually distribute between \$200,000 - \$300,000 while also actively building a reserve to continue this vital work long into the future. To this end, in addition major donor support, Fred Says will continue its grassroots fundraising efforts through strategic programming and opportunities.

Finally, with the publishing of *When Dogs Heal*, which followed several exhibitions of the photographs and stories contained with the book, Fred Says may use this tremendous tool to raise further awareness to its mission, grow its support base, and potentially engage in additional creative activities related to the publication.

Planning Process

Fred Says worked with Christopher Barrett Politan, Principal Give, Get, Grow Philanthropic Advisory on this Strategic Planning Process.

In this capacity:

- Consultant interviewed a stakeholder group of 15 individuals, identified by Rob Garofalo including board members, grantees, and community partners;
- Interview findings have been aggregated without attribution to inform key findings from the research
- Consultant conducted a literature review of available collateral;
- Consultant facilitated a Strategic Planning retreat with the Board; and
- Consultant presented this Framework for approval and adoption.



Vision, Mission & Values

These foundational statements were refined during Fred Says' Strategic Planning retreat and speak to its work both now and in the future.

Vision:

To ensure all youth have the resources they need to live healthy and fulfilling lives.

Mission:

We provide financial support to organizations that serve transgender young people and youth living with and impacted by HIV around the world.

Values:

- Integrity – Fred Says will imbue all its work with thoughtful and intention care
- Creativity – Fred Says will seek out way to use its resources to shift traditional paradigm, explore new methodologies, and embrace risk.
- Empowerment – Fred Says recognizes, validates, and supports autonomy for all young people
- Hope – Fred Says' model of philanthropy is grounded in optimism, joy, and appreciation for life.
- Acceptance – Fred Says agrees to meet every individual exactly as and where they are.

SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)

<p>Strengths</p> <ul style="list-style-type: none"> • Strong and focused mission • Deep connection to the work • Compelling narrative 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Organizational systems • Clearly articulated vision and values statements • Capacity
<p>Opportunities</p> <ul style="list-style-type: none"> • Leveraging other funding/funders • Partnership with an administrative entity to support capacity needs • Development of a youth advisory board • Investing its capital to create additional capital 	<p>Threats</p> <ul style="list-style-type: none"> • Change in the issues we seek to support from a macro-level • Funding

Key Priority Development

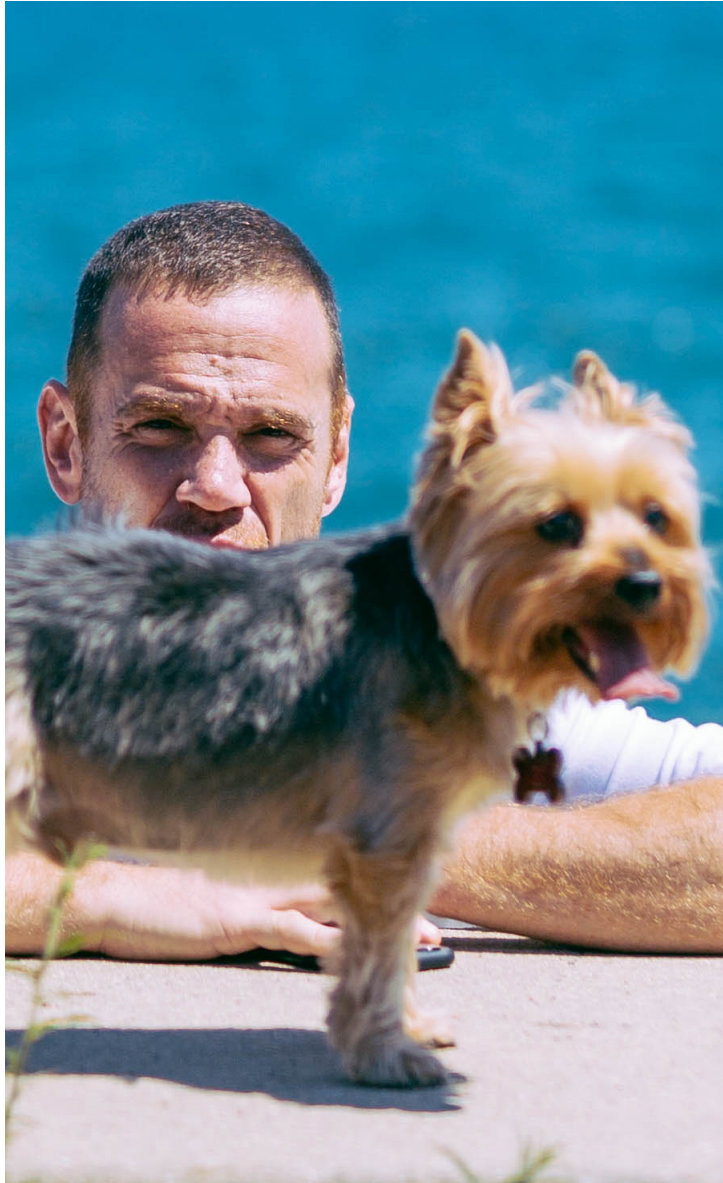
After reviewing the literature and conducting stakeholder interviews, the following themes emerged. Within this Strategic Framework, these broad themes are Key Priorities representing large pieces of work that the organization will address through smaller initiatives and tactics over the duration of the plan.

Key Priorities are defined by a Strategic Objective grounded in Fred Says' desired state to contextualize their importance as anchors over the next five years.

Fred Says' Key Priorities include:

- **Organizational Vitality**
- **Thought Leadership**
- **Champion**

Key Priority – Organizational Vitality



Strategic Objective:

Fred Says will create adaptive and flexible internal processes that are values aligned, reflective of its capacity, and supportive of all volunteers.

Context:

Fred Says seeks to remain a nimble, volunteer-led organization with internal systems that are adaptive, shared, and non-bureaucratic.

Strategic Initiatives:

- By engaging its Board in **GRANT MAKING** along with the development of focused evaluation tools, Fred Says will expand its reach and have easier methods of assessing its impact.
- Fred Says seeks to continue the legacy of its founders by ensuring that **RESERVES** are built to support this work for many years into the future.
- Aply led volunteers, Fred Says will create some simple **GOVERNANCE** tools to ensure full and active participation by its board members.
- As Fred Says seeks to empower young people, it will invite **YOUTH VOICES** to participate in decision-making processes.
- Fred Says will continue grassroots **DEVELOPMENT** efforts to ensure that the organization has multiple sources of income to support its mission. Further, it will position itself to be available for passthrough grant making consistent with its Vision, Mission, and Values.

	GRANT MAKING	RESERVE BUILDING	GOVERNANCE	YOUTH VOICE(S)	DEVELOPMENT
YEAR ONE	<ul style="list-style-type: none"> • Build evaluation tool • Develop final report tool 	<ul style="list-style-type: none"> • Set aside \$250,000 • Research and determine savings vehicle 	<ul style="list-style-type: none"> • Host annual retreat • Define Board roles 	<ul style="list-style-type: none"> • Assess opportunities for youth to be engaged in governance activity 	<ul style="list-style-type: none"> • Create development calendar • Highlight impact on website • One digital appeal
YEAR TWO	<ul style="list-style-type: none"> • Implement final report tool • Identify 1-3 new grantees through Board process (see addendum) 	<ul style="list-style-type: none"> • Set aside \$250,000 	<ul style="list-style-type: none"> • Host annual retreat • Develop onboarding materials for new Board members 	<ul style="list-style-type: none"> • Identify and train one young person to serve on FS Board 	<ul style="list-style-type: none"> • Have one conversation with new funder about international work • One digital appeal
YEAR THREE	<ul style="list-style-type: none"> • Assess evaluation tool • Assess final report tool 	<ul style="list-style-type: none"> • Set aside \$250,000 	<ul style="list-style-type: none"> • Host annual retreat • Begin recruitment for 1-2 new Board members 	<ul style="list-style-type: none"> • Include one young person in all Board functions 	<ul style="list-style-type: none"> • Create multi-year impact report • One digital appeal

Impact

1. Board-centered grant making process
2. \$750,000 in reserve
3. Clearly defined Board role and points of engagement
4. One young person on the Board
5. Income secured through multiple donors

Key Priority – Thought Leadership

Strategic Objective:

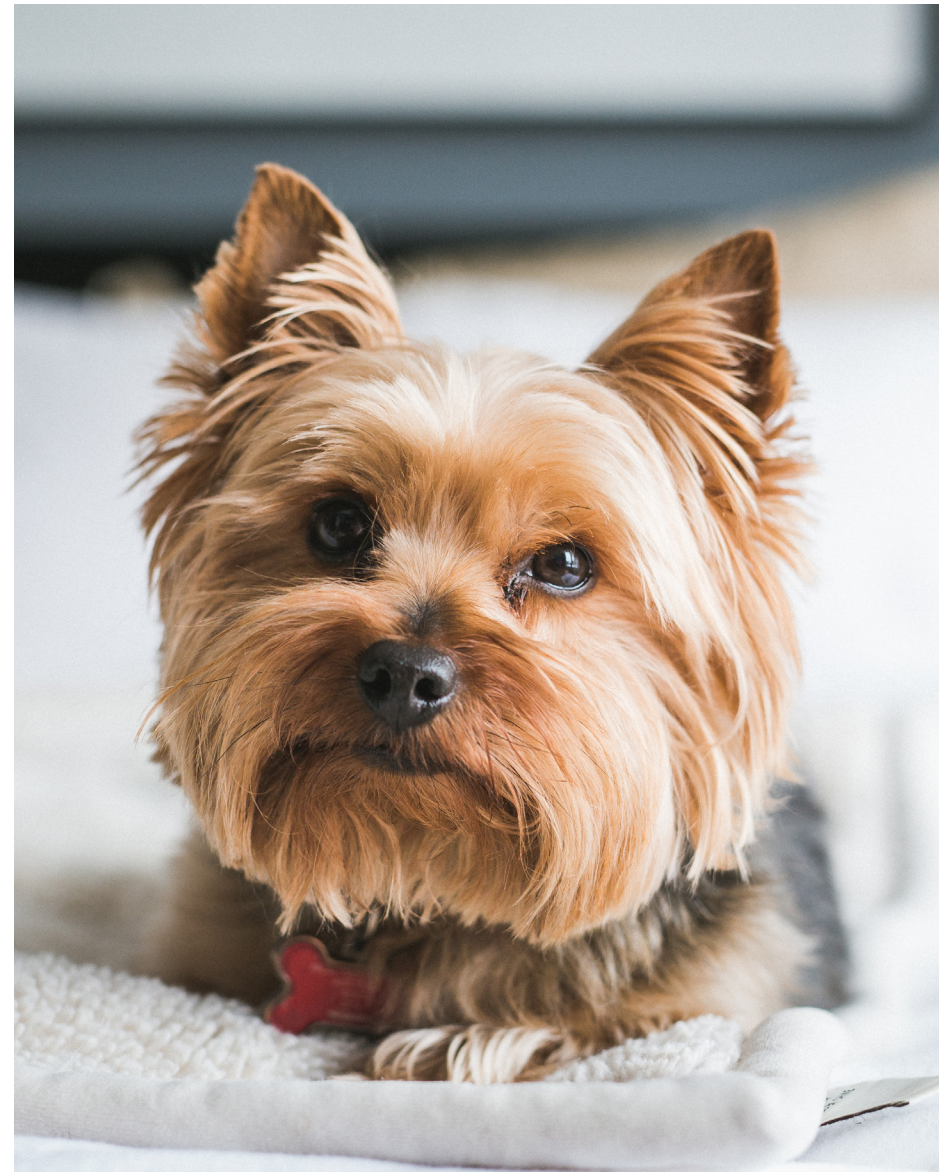
Fred Says will be a leader both in practice and in principle, encouraging like-minded organizations and individuals to deepen their engagement in the issues Fred Says seeks to impact.

Context:

Fred Says is an organic extension of Dr. Garofalo's clinical and research practices. As such, the organization seeks to be a trusted partner with and amplifier for the work of its grantees, inviting others to join in efforts to support critical issues facing transgender and HIV impacted youth.

Strategic Initiatives:

- Fred Says will serve as a **CONVENER** for its grantees and for thought partners engaged in mission-aligned work.
- In fulfilling the aims of its mission, Fred Says will seek out strategic **PARTNERS** with which to align its work.
- Working to champion both its grantees and its work, Fred Says will seek opportunities to generate **PRESS**.
- Fred Says will be a committed partner with **INTERNATIONAL** organizations supporting young people impacted by HIVMission, and Values.



	CONVENING	PARTNERSHIP BUILDING	PRESS	INTERNATIONAL ENGAGEMENT
YEAR ONE	<ul style="list-style-type: none"> Survey grantees to determine desire and availability to participate in grantee summit 	<ul style="list-style-type: none"> Identify 1-2 strategic (non-grantee) partners 	<ul style="list-style-type: none"> Develop press list Develop press kit 	<ul style="list-style-type: none"> Host 1-2 annual conversations with current international partners to conduct needs assessment
YEAR TWO	<ul style="list-style-type: none"> Plan grantee summit 	<ul style="list-style-type: none"> Work to create formal agreement with one strategic partner 	<ul style="list-style-type: none"> Seek one local (Chicago) feature story 	<ul style="list-style-type: none"> Invite current international partners to refer 1-2 potential grantees
YEAR THREE	<ul style="list-style-type: none"> Host grantee summit 		<ul style="list-style-type: none"> Seek one national feature story 	<ul style="list-style-type: none"> Allocate funding to 1-2 new international grantees

Impact

1. Hosted grantee summit
2. Develop 1-2 new strategic partners (non-grantees)
3. Generated 1-2 feature stories
4. Deepened understanding of international needs

Key Priority – Champion



Strategic Objective:

Fred Says will leverage its distinctive content and media platforms to raise awareness for the issues it seeks to impact, along with its grantees.

Context:

Fred Says seeks maximize exposure for the vital work of its grantees and will do so by deploying its marketing and communications tools to raise awareness and build support for mission-aligned organizations.

Strategic Initiatives:

- Plush **TOYS** resembling Fred have been well received by countless young people at partner organizations. Fred Says will continue this practice as a legacy to its founder.
- In addition to its Board-centered grant making, Board members will be encouraged to be **AMBASSADORS** for Fred Says.
- **WHEN DOGS HEAL** through continued opportunities for sale and potential creative projects will continue to highlight the powerful human-animal connection
- Fred Says will seek out ways to **AMPLIFY** the stories of its grantees, center the voices of young people, and raise awareness for transgender and HIV impacted youth

	TOYS	BOARD AMBASSADORSHIP	WHEN DOGS HEAL	AMPLIFICATION
YEAR ONE	<ul style="list-style-type: none"> • Determine quantity of toys desired for annual distribution • Determine recipients 	<ul style="list-style-type: none"> • Have each board member grow through Board-centered grant making process 	<ul style="list-style-type: none"> • Continue promotions of WDH • Continue WDH creative conversations 	<ul style="list-style-type: none"> • Create annual marketing/communications plan • Highlight one grantee story on website
YEAR TWO	<ul style="list-style-type: none"> • Distribute toys 	<ul style="list-style-type: none"> • Create simple Board member talking points 	<ul style="list-style-type: none"> • Continue WDH creative conversations 	<ul style="list-style-type: none"> • Highlight 1-2 grantee stories on website • Highlight one grantee in local media outreach
YEAR THREE	<ul style="list-style-type: none"> • Continue toy distribution • Assess toys as tools 	<ul style="list-style-type: none"> • Invite 1-2 Board members to speak at partner-led programming. 	<ul style="list-style-type: none"> • Finalize WDH creative project 	<ul style="list-style-type: none"> • Highlight 1-2 grantee stories on website • Highlight 1-2 grantees in national media outreach

Impact

1. Wide distribution of Fred plush toys to grantee partners
2. Continued When Dogs Heal book sales
3. Exploration of other creative uses for When Dogs Heal and Fred Says content
4. Annual marketing/communications plan
5. Implemented marketing/communications strategies

A close-up, low-angle shot of a person's legs in light blue shorts and dark sneakers walking on a paved sidewalk. To the right, a small Yorkshire Terrier dog stands on the sidewalk, looking up and to the left with its pink tongue hanging out. The dog is wearing a dark collar with a bone-shaped tag that says "TEAM FREE". The background is a blurred outdoor setting with a concrete curb and greenery.

ADDENDUM



Interview Protocol

- How are you engaged with Fred Says and how has this experience impacted your thinking about the organization’s work?
- Are you inspired by the work of Fred Says and if so, how and why?
- What is your understanding of the mission/ central purpose of Fred Says?
- Grant recipient(s)
 - How have grants from Fred Says been used by your organization?
 - How flexible have the grant dollars been?
 - What makes a grant from FS different from other grantors?
- Partner/Board Member
 - How might our grantmaking change if the organization received an influx of capital?
 - What are essential grant priorities that define Fred Says?
- If there is a central role that Fred Says might play in our grant making, what might that be?
- Are there pressing issues that are consistent with your understanding of the mission of FS, that we should consider addressing?
- It is the intention of Fred Says to support marginalized communities. Is Fred Says addressing the needs of marginalized communities? What might we be doing better?
- What would you like to see Fred Says doing in five years?
- How might Fred Says support grantees beyond its dollars and is that consistent with the aims of Fred Says’ work?
- Is there anything else that you’d like to share about Fred Says and our future?

Stakeholders

Internal

Rob Garofalo
 Christina Garofalo
 John Garofalo
 Zach Stafford
 Lisa Kuhns
 Brad Gerber
 Babafemi Taiwo

External

Nadia Dowshen
 Marvin Belzer
 Linda-Gail Bekker
 Debra Hauser
 Karen Musgrove
 Kara Eastman
 Ellen Kahn
 Susannah Allison

Grantmaking Process



As Fred Says seeks to deepen the engagement of its Board members, the organization proposes the following annual grant making strategies:

Emergency Fund/Reserve – the organization will allocate dollars towards an Emergency Fund, which will provide responsive funding to organizations addressing critical issues related to transgender and/or HIV impacted young people. Any Board member may suggest a recipient and grants opportunities will be reviewed at quarterly Board meetings. If no Emergency Grants are made and/or if the whole Emergency Grant award allocation is not spent, unspent dollars will be put in reserve.

Board– each Board member will spend a year researching, investigating, and having conversations with a potential new grantee organization. The Board member will present updates on their discovery at each quarterly Board meeting. During the 4th quarter Board meeting, each member will present their organization and their recommended funding allocation. All Board members will have the opportunity to present an organization, but are not required to do. A simple majority vote is required to make a grant to a new organization. This process will be repeated annually with the goal of adding 1-2 new organizations per year as grantee partners.

Founder – Dr. Rob Garofalo, through both his research and clinical practice, will continue to be deeply engaged in relationship-building with and identification of grantee organizations. During the 4th quarter Board meeting he will propose his slate of grantees for review and vote by the Board. This process will be repeated annually.

Thank you!

**A special thank you to all
of the stakeholders who
participated in this
planning process.**



Fred Says

