

**2E. Development: Beyond Bake Sales:
Raising Money from Private Sources**

CAPLAW 2011 National Training Conference

Thursday, June 16, 2011
8:30 a.m. - 10 a.m.

Minneapolis, MN

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CAPLAW 2011

1

BEYOND BAKE SALES
RAISING MONEY FROM PRIVATE SOURCES

PRESENTED BY JEAN BLOCK
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2

About Jean Block



- More than 45 years in nonprofit sector as Board and Staff Leader.
- Author: *The ABCs of Building Better Boards* and *Fast Fundraising Facts for Fame & Fortune*.
- President, Jean Block Consulting, Inc. since 1996.
- Manager, Social Enterprise Ventures, LLC since 2006.
- www.jblockinc.com
- www.socialenterpriseventures.com

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3

LET'S START AT THE BEGINNING...

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**START WITH THE SHOE
BOX**

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Start with the Shoe Box

5

- Well, not really, but where *are* you now?
- What resources are in place?
- Is there a mailing list?
- Is there a donor list?
- What is being done today?
- Does the Board have a Development Committee?
- Do you have a mentor?

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It's All in the Plan

6

Diversification is the Key –
Your Eggs have to be in Many Baskets!

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Basic Elements of a Diversified Plan

7

- “Annual” Campaign/Direct Mail
- Special Events
- Grants (foundations, corporations, etc.)
- Sponsorships, Underwriting
- Earned Income, Sales, Fee for Services
- Contracts
- In Kind
- Social Media Campaigns
- Planned Gifts/Major Gifts

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Keys – Special Events

8

- Detailed Planning
 - Budget
 - Theme
 - Place
 - Volunteers
 - Sales
 - Entertainment
 - Safety.....etc. etc. etc.
- Special!
- Fun!
- Cost:Benefit Evaluation

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Keys - Grants

9

- Mission Matched
- Grantor-Focused
- Researched
- Request Guidelines Followed
- Outcomes Reported
- Renewable

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Keys - Sponsorships

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- Mission-Matched
- Sponsor-Focused
- Meaningful Benefits Offered
- Thanked and Involved

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Keys – Earned Income

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- Based on Agency Assets
- Research and Feasibility Studies
- Costing Analysis
- Sales Plan
- Business Plan in Place

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Keys – In Kind

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- Needs Identified
- Board, Staff, Volunteer Involvement
- Thanked and Involved

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Getting Started – Build a List

13

Start at the Center of Your Universe



Staff
Board
Clients
Volunteers

Circles of Ideas and Influence
Expand the Universe

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Expand the Universe

14

- Logical Connections – Mission Matching
- Research 990s – www.guidestar.org
- Collect Annual Reports
- Read the Paper
- Search the Internet
- Alert for Connections – everywhere – all the time

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Where Does Money Come From?

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- 85 - 88% from Individual Givers
- 7 – 10% from Foundations
- 4 – 6% from Corporations

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You'll Need a System

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- Donor Management Software
 - Start with something you can manage yourself!
 - Even an Excel spreadsheet will work.
 - Capture demographics, giving history, source of name, etc.
 - It will have to expand as you get more sophisticated.
- Compare Typical Software - www.techsoup.org

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Have a Story to Tell

17

- Powerful Messaging – Mission and Purpose
- Donors Need to See Results and Outcomes
- Focus on the Positives
- Build Enthusiasm
- Make it Personal – Connect with Donors
- People Give to People – Use the Best 'Asker

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What Will it Cost?

18

Typical Fundraising Costs as a % of Revenue

Special Events 50-60%

Direct Mail Acquisition 100-125%

Annual Giving Program 25%

Grants 20-30%

Major Gifts 10-15%

Planned Gifts 2-10%

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Get Started

19

- **Focus on Efforts to Get The Highest Initial Return**
 - A fun special event to draw a logically-connected target audience.
 - A non-event direct mail campaign from the Center of your Universe (Board, staff, volunteers, clients).
 - Press releases and Internet 'buzz'.
 - A newsletter (e-newsletter) to potential donors.
 - "Feed" your database every way you can!

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Why Donors Give

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People Give Because They Were
ASKED!

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Why Donors Keep Giving

21

- Because They Were Asked...
- Because They Were Thanked...
- Because They Were Involved...
- Because Their Gift Matters...

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Ask!

22

- **Ask Often in a Variety of Ways**
 - “Annual” campaign should be quarterly - at least
 - Invite to events
 - Use social media effectively
 - Mail
 - Newsletter (e-newsletter)
 - Personal visits

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Thank!

23

- **Make it Timely and Meaningful**
 - 48 hours
 - 3 times or more!
 - Connect donor to reasons and results
 - Thanking vs. acknowledging
 - Who thanks?
 - Personal thanks for major gifts
 - IRS guidelines – Publication 598

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Involve!

24

- **Volunteers Give More Money!**
 - Special events
 - Board of Directors
 - Programs and services
 - Meaningful opportunities

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Renew!

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- **Start All Over Again**
 - Donor acquisition efforts ongoing
 - Database in continual update mode
 - Annual evaluation of all efforts (cost:benefit)
 - Open to new opportunities
 - Can you collaborate?

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A PARADIGM SHIFT

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Let's Talk About Marketing

27

**WHAT DOES *MARKETING* HAVE
TO DO WITH SUCCESSFUL
FUNDRAISING?**

EVERYTHING!

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Marketing - Definition

28

Marketing Means Finding a Need and Filling It...*if you can!*

- One size does not fit all – match your request to the funder's needs.
- Shift from Charity to Partnership.
- Shift from Funding to Investing.
- Teaspoons or ladles?

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The Paradigm Shift

29

Selling vs. *Opportunity*

You hold the opportunity for the funder/donor.

No begging and no whining!

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The You:Me Ratio

30

It's not about you!

Homework and **Colored Pens**

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31

WHAT'S NEXT?

THE SECRET OF MONEY

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The Secret of Money

32

ALL SOURCES OF MONEY HAVE ONE THING IN COMMON - TO GET IT, YOU HAVE TO ASK FOR IT.

WITH RARE EXCEPTIONS, WILL MONEY JUMP UP AND SAY,
"TAKE ME, TAKE ME, I'M YOURS ... AND WOULDN'T YOU LIKE A LITTLE MORE?"

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Asking Successfully

33



**AND NOW...FROM THE FIELD OF EXPERIENCE...
\$50 MILLION+**

JEAN'S 10 RULES FOR FUNDRAISING SUCCESS!

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Rule #1

34

**Ask for What You Want...
or Take What You Get**

- Be specific.
- “Can you help us?” *Ouch!*
- “Anything you can do.” *Ick!*

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Rule #2

35



Assume a Yes!

- Leave plenty of white space.
- Nod and smile.
- It's all about *Attitude!*

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Rule #3

36

**If Your Prospect Says Yes
Immediately...**

- You can always negotiate down.
- Don't undervalue your opportunity.

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Rule #4

37

Create Opportunities

- Have several options ready, but...
- Don't deliver them all at once.

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Rule #5

38

People Give to People

- Ask in person.
- Know your donor.
- Send the right one to ask.

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Rule #6

39

Never Talk to the Person Who Can Say No!



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Rule #7

40

No Won't Make You Shriveled and Die

- The beginning of a long and fruitful conversation.
- An opportunity to build a relationship
- Four things to do:
 1. *Thank you*
 2. *What do I need to know...*
 3. *Who else...*
 4. *What else....*

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Rule #8

41

People Want to Back a Winner

- No whining.
- No begging.
- Sell what's working!

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Rule #9

42

You Can't Ask Others to do What You Haven't Done

- Make your gift first.
- Ask others to join you.
- Buy your ticket...etc.

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Rule #10

43

Thank you! Gracias! Merci! Danke!

- Timely and meaningful.
- Thanking vs. acknowledging.
- 3 times (at least).



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44

Q & A

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45

SOME IDEAS YOU CAN TRY

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“Celebrity”Waiters Event

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- Recruit local “celebrities in their own minds.”
- Waiters buy their table and give away the tickets.
- Print tickets with “bring your money and your funny bone.”
- Have a theme – decorations, costumes, invitations, etc.
- Waiters compete for tips.
- Food is served family style by waiters (and can be messy).
- Add a silent and live auction (and raffle baskets).
- Communicate often with waiters to prep them on ways to raise money (decorations, prizes, removing table items, etc.)
- Give waiters aprons (with big pockets), envelopes for tips.
- Don’t need other entertainment.
- www.jblockinc.com for details

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Feel Like a M\$ll\$ona\$re Raffle

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- Yellow Pages – gift certificates.
- Keep value to less than \$5,000.
- Only print ‘sales’ sheets.

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NonEvent

48

- Invite people to an event that doesn’t happen.
- Guests pay NOT to attend.
- Have a fun theme and fun reasons not to attend.
- Capture email address to hold a ‘virtual’ event.
- Print invitations with blank envelopes for Board to send.
 - Board personalizes envelopes, invitations
 - Board thanks (as well as agency thanks)

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Paper Airplane Toss

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- Sell sheets of paper.
 - Print rules, name, address, email
- Win a car.
 - Hole in one insurance
 - Indoor
- Win prizes.
 - Containers and volunteers

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More Ideas

50

- Arts & Crafts Sale
- A-thons
- Canisters
- Carnival
- Celebrity Car Wash
- Casino Night
- Chocolate Event
- Concert
- Costume Event
- Cow Plop
- Dinner with a Speaker
- Flea Market
- Food Sales at Events
- Giant Monopoly Game
- Golf, Tennis, Bowling Event
- Grand Opening
- Guessing Contest
- House or Garden Tours
- Legs Contest
- Live & Silent Auction
- Mail Campaign
- Membership Drive

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More Ideas

51

- Mud Volleyball Tournament
- Product Sales
- Ransom Event
- Road Rally
- Roast
- Scavenger Hunt
- Services Auction
- Silly Olympics
- Spelling Bee
- Stair Climb
- Street Blockade

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Resources

52

<p>Fast Fundraising Facts for Fame & Fortune[®]</p>  <p style="text-align: center;">Download at www.jblockinc.com</p>	<p>Exploration – Management by Assessment[®]</p>  <p style="text-align: center;">Download at www.jblockinc.com</p>
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Resources

53

VALUABLE MEMBERSHIPS

Association of Fundraising Professionals www.afpnet.org
 Statewide Centers for Nonprofit Excellence
 Society for Nonprofit Organizations www.snpo.org
 Guide Star www.guidestar.org
 Board Source www.boardsource.org
 Industry-Related Organizations (mission matching)

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Thank You!

54

HOW CAN I HELP YOU?

VISIT MY WEBSITE AT WWW.JBLOCKINC.COM FOR
 SAMPLES, FORMATS, FREE E-NEWSLETTER.

EMAIL ME AT JEAN@JBLOCKINC.COM

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