

Nonprofit 911 – October 30, 2007
Event 101 for Fundraisers
With Jeff Shuck of [Event360](#)
Sponsored by Network for Good
www.networkforgood.org/go

The audio transcript can be found at www.fundraising123.org

Jono Smith: Hello and welcome to Nonprofit 911. It's October 30th, and this call is sponsored by Network for Good. My name is Jono Smith and I am the Marketing Manager here at Network for Good. If you've participated in Nonprofit 911 before, I'd like to welcome you back to the training series, and if you're a first-time visitor, you may be wondering why we host these training calls and what the catch is.

Well, the good news is there's no catch. Network for Good is a nonprofit, just like you are, and our mission is to help other nonprofits raise money online. These training calls are a free service to the nonprofit community to help you improve your online fundraising results.

And we also provide online fundraising services directly to nonprofits, but this isn't a sales call where we're just going to discuss these services, although I will have some comments at the end of today's call about how you can learn more about Network for Good. But more on that later.

We've had over 500 people register for today's call, Event 101 for Fundraisers - Putting Your Mission Into Action. I just wanted to cover a couple of housekeeping items before we get started. All lines have been muted and this call is being recorded.

You should have received an email from us this morning with a copy of the slides for today's call. If you did not receive that email, you can do a couple of things. One, you might take a look in your junk folder, or you can go to www.fundraising123.org and you can download the slides from there. If you've visited that website before, you may need to refresh your browser to see the link. And you can also, within 24 hours of this call, access an audio transcript of today's call at www.fundraising123.org.

At this point, I would like to introduce today's speaker, Jeff Shuck. We're very fortunate to have Jeff with us today. He's truly a visionary in the field of nonprofit marketing, fundraising and events. As the CEO of Event 360, he's led a team that has produced over 60 fundraising events which have covered thousands of miles of road, involved well over 100,000 participants and raised more than \$250 million for charity in just the past five years alone.

Jeff lives outside of Chicago, in a beautiful location in Michigan City, Indiana, with his wife and three kids, and he's a graduate of the University of Rochester. He's currently attending the Kellogg School of Management at Northwestern University, and is active in a number of nonprofit causes and associations.

Jeff is going to speak today for about 45 minutes and then reserve the remainder of his time for your questions. If you'd like to ask a question at any point during today's call, please email us at fundraising123@networkforgood.org. And once again, if you did not receive the slides for today's call, you can access those at www.fundraising123.org or you can just sit back and listen and enjoy today's speaker.

So, without further ado, I'm going to turn the call over to Jeff Shuck. Jeff, you there?

Jeff Shuck: I am here. Thank you. Thanks so much, everyone, for coming, and thank you, Jono. I'm very excited to be here and I appreciate everyone's time, and 45 minutes is a tough time slot for me, because I'm very long-winded, so I'm going to jump right into things.

As Jono said, at [Event 360](#), our mission is to work with not-for-profits to help them achieve their missions through producing events that work. We work with all sizes of organizations and projects from very small events that are raising \$10,000 to nationwide event series that raise over \$80 million. I wanted to try to condense a few years of learning and a lot of experience in the field into 45 minutes.

Because of the timer, the call is going to be pretty high-level, so I apologize to those of you who feel that this is too basic, and I apologize to those of you who feel it's not detailed enough. But I'm just trying to give you a broad set of strokes on some of the big things I think you need to focus on as you look at doing an event fundraising effort.

I do encourage you to ask questions at the end and I am available afterwards for discussion and feel free to send me an email on the address, on the presentation. I'd love to follow up with you.

So to jump right in, if you'll go to slide two, I wanted to start with a story that may or may not sound familiar to you, depending upon the character of your organization and your own experience, but let me read it very briefly. Your board chair calls you on a day in January and says, "I've been thinking that we should do a fundraising event, maybe an event for Mother's Day. You know, by then the weather will be beautiful. We can have it over in that park by the lake, something classy and fun."

She starts to go on and you have this mounting feeling of dread in your stomach and she says, "I think it might be a way to maybe jump-start our capital campaign, plus you never know - we'll get some great PR, show up on the cover of the local paper, maybe attract a few younger people for the mailing list." And within 20 minutes, before you even have known what's happened to you, you've inherited a new project.

Well, what's wrong with this picture? Go to slide three and I'll try to highlight a few themes that we're going to talk more about in the next 40 minutes. First of all, someone's calling you in January for an event that you want to have in May. Hmm, pretty slim timeframe there, so that might be something that we'd want to take a look at.

We're going to do a fundraising event and we're going to do it for Mother's Day. That's interesting - there's a lot of other things that happen on Mother's Day. So maybe we want to think about if that's the best place to do an event or best time to do an event.

Sounds like the venue's already been chosen, the park by the lake. Hmm, that could be a little bit limiting, so that's something we might want to look at further. We want it to be classy and fun, two words that may or may not go well together. So that's something that maybe should raise our radar a little bit. We're going to use it to jump-start the capital campaign but we already said that it's a fundraising event; so it sounds like maybe there's a little disconnect on what the intended goals are.

We also want some great PR and attract younger people for the mailing list. Now, young people and capital campaigns don't always go well together; so it sounds like there's a little bit of further disconnect about the goals here. And finally it doesn't seem like anyone's been actually tasked to do the event, other than you, because you took the phone call.

This highlights a lot of things that we see every day as we work with organizations. The great news is all of these things are fixable, so what I want to spend a little bit of time doing is highlighting some of the traps that organizations fall into that lead to events that become far less performing than they want to be, and maybe give you a few tools on how to avoid those.

If you'll go to slide four, I want to talk to you about something that we call the 'old event paradigm' and it's the way that we usually look at events. We look at them as opportunistic. We have an opportunity to do something. Someone who owns a certain venue has called us and said, "Why don't you host a dinner here?" So they're not really planned out, we kind of strike while we can.

They're built to get incremental revenue, just any additional funding that we need on top of the funding that we already have. They're generally reliant on volunteers and committees and tapping into overworked staff. They usually are built to tap into existing audiences that you already have. So we have this pool of people on our mailing list - let's invite them to an event.

We use a word that is one of my least favorite phrases in fundraising, called 'friend-raisers', which is really, in my mind, an excuse to justify underperforming events by saying, "Well, it's OK that we didn't raise any money because we made a lot of friends."

And the old event paradigm basically has events that are, let's face it, a pain in the neck - draining, hectic, underperforming, and it's no secret that everybody hates doing events because if you were doing something that was listed as opportunistic, that was made to just raise friends and not money and that took all of your time, why would you like doing it? Well, you shouldn't like doing it.

What I want to tell you about or ask you to think about is on slide five, what we call the 'new event paradigm', a different way to change how you look at events. Strategic - so focus on the mission of the organization. Two, part of a holistic development effort meant to integrate into everything that you do as an organization to raise money - that have distinct events for distinct goals. An event that is built to kick-start your capital campaign is probably going to be very different than an event that's built to get PR -- and we'll talk about that particular issue in some detail.

An event that, instead of tapping into existing audiences, actually proactively targets audiences, both existing audiences and new audiences; an event that combines staff, volunteers and professional resources - that includes centers, that includes partners, that includes companies like mine.

The new event paradigm has events that are successful, engaging and enriching. This paradigm is emerging whether we want it to or not, whether we acknowledge it or not. Because of the growth of experiential marketing just generally in the industry -- and I'm talking not just not for profit, but all organizations -- experiential marketing is now a \$50 billion annual industry. And it accounts for nearly 2/3 of all money that's spent on broadcast by organizations.

Let me say that differently; organizations spend about \$70 billion on TV and radio. Well, now they're spending another 50, so almost the same amount on events. Why? Because it's working and through that there's emerging a different kind of paradigm about events that actually have to be driving into markets and achieving goals that are different than what we usually expect for events.

If you go to slide six, I just want to graphically illustrate what I'm talking about. Kind of the existing way we look at events may be the new way that we should. Some of you are probably very familiar with it; this is usually depicted as a pyramid or a tree. It's just the hierarchy of fund raising programs. And at the bottom you have annual getting intended to get a lot of money from a lot of people in small donations. Then going to major gifts, capital campaigns, and then kind of the holy grail for fundraisers is someone bequests money to an organizations.

And then look where events is. Kind of working off into the side in this forlorn little box is events. Well the newest event paradigm, at least, what I'm going to try to ask you to think about today, is on slide seven. That is; events that are integrated into everything that the organization is doing particularly for fundraising events to be integrated into everything that you do developmentally as an organization.

So you have volume events that are tied in and work together with annual giving and targeted events that help with major giving. Launch events that are integrated with capitol campaigns or recognition events that work with bequests. Part of the new paradigm, a new way of looking at what we want from events and what they can do for us.

Now throughout the presentation I'm going to highlight a few things and I'm going to say,

"If you remember just one thing, remember this." And I'll probably say that more than one time. But I just want to try to break down a few key take-aways for you. And on slide A I have broken down the first one, which is: key take-away number one. Events are a development function. Fundraising events are meant to raise money. They aren't meant to raise friends.

So this is a key thing that I would ask you to remember, that the successful events, particularly successful fundraising events, are successful in part because they are viewed as valid developmental function, a function that is integrated with all of the other development efforts of an organization.

Now, let me expand on some of this and give you a couple more general take-aways. And then I want to talk specifically about some tactics that you can use to at least help you setup an event so that it's going to be more successful than maybe it has been for you in the past.

On slide nine there's some recap of information that you're probably very familiar with and there's so many resources, yet more information about some of these trends on here, including Network for Good. But let me just recap what is happening in the nonprofit landscape. It's changing rapidly. The number of charities is increasing dramatically every year. I think in 2006 35,000 new 501(c)(3)s were registered with the federal government. Each of those organizations has a good cause. That's an important thing for us all to realize. The number of not for profit is growing and everyone is doing something that they think is important.

But giving is a proportion of GDP's flat. It has been flat for about 40 years. So giving is increasing, but giving is growing essentially with the growth in gross domestic product. So basically what you're seeing here is more and more organizations that are competing for a static pool of funding. That's means obviously the competitive environment among not for profits is increasing. It's getting more and more difficult for organizations to differentiate themselves.

Now, on top of that, obviously little things like the Internet are change the way that we hear about information and the way that we process it. There are more and more media outlets and more messages than ever before. And particularly in fundraising, the Internet is beginning to transform how people relate to giving with their organization. There have been so many examples of that from Katrina to the Asian tsunami. And many of you probably use technologies having anything from Contrarus, Convio, to sales force, all kinds of different ways that you're trying to reach people through the Internet.

But, through all of this, what is happening, well, the largest and wealthiest organizations are becoming larger and wealthier. That's what's happening. And on the front page of Chronicle For Interview this week there's a story about the Philanthropy 400, the largest 400 charities in the United States that are growing at a faster rate than everybody else.

And here's a startling statistic for you; there are \$1.04 trillion in assets in the nonprofit

space. \$1.04 trillion! 60 percent of those assets are held by one percent of the organizations. So we're talking about an area that is very desperate in terms of income, distribution, resource distribution, and everything else. And I know you're sitting there nodding your head and saying, "Yes, exactly. That's why I'm on this fundraising 911 call, so give me something that I can use."

So, I don't want to tell you something that you already know. I don't want to paint a picture that you need to be worried about. What I'm saying is you need to be aware of it and you need to be able to feed your own event efforts in the context of what is becoming a very cluttered, and frankly, competitive landscape. And we're going to hopefully talking about that a little bit more here in the next couple five.

So what to take away from all of that? Go to slide 10. Well, here's what I want you to take away from this. I don't want you to be scared. I don't want you be worried. I want you to know that you're organization have a valid purpose and people want to hear about it. But, you can't assume that people will know about who you are, and you definitely can't assume that people will care.

And he's where I kind of down shifted in the corners of the sales pitch for just half a second I'd say. This is why I do what I do. Because in the modern world of not for profit and in the modern world of advocacy and fundraising, I believe you have to have an experiential component to what you do. In other words, you have to do events fundraising, even if it's a pain in the neck. You have to, because everyone else is and because your donors, your potential advocates, and your potential sponsors are being contacted by other groups who have causes that are equally as compelling as yours.

So in this environment, you can not take for granted the power of your mission. You have to tell people about it. And you have to find and immersive experiential way to tell people about it.

So how do we do that? Well, that gets us into some more tactics, and throughout the presentation, I hope you'll feel that we're getting more and more detailed. Go to slide 11. A point I want to make is; successful events are planned that way. You can do a lot during the process of planning an event to make sure that it becomes successful, but you can also do a lot right at the beginning to make sure that it's a failure. And so the seeds of success really start when that first phone call is made, or you receive the first phone call from your board chair saying, "It's January 1st and I'm thinking about doing an event on Mother's Day."

Establishing a process that's driven towards results that has clear goals, clear ways of measuring them, is critical. And you will find that the event itself is much easier to manage if you do the initial steps correctly. So that's what I want to talk about now; is what are those steps? How do you take steps to make sure that the end product is what you want?

And before we get there, that leads to slide 12. Another take-away I want to share with

you. And this is probably something that you kind of already heard me allude to, even in the first 10 minutes, which is that; events are a means to an end. And that's something that before we even get to the event planning process, I think it's really important to emphasize. We don't do events for their own sake, absolutely not. Events are done to further the mission in your organizations.

So what is fascinating to me is when we work with organizations, usually it starts with someone saying, "I want to do a new event", or "I've already done an event and it didn't really work." And so I'll say, "Well, tell me about your event, how was it?" And one of the first things I hear about; I hear about the weather, I hear about how happy or sad the board was. I hear about what the room looked like. I hear about what people ate.

Well, those are fantastic things if your organization's mission is to feed people gala dinners or if you're organization's mission is to make your board happy or sad or if your organization's mission is to celebrate good weather. Then those are all good characteristics of good events.

However, most organizations have a mission that's far nobler than having a good time. And so a successful events process starts by saying, "You know what? The event is a tool. The event is a vehicle that takes us from one place to another. The event is not end. We don't do an event to have a good event."

But in event planning, just like in the story that we started with, so much of the attention ends up going to the event itself instead of why we're doing the event. So, we start almost immediately talking about the park by the lake, it'll be classy, it'll be fun, we'll have these table settings, I know a good caterer.

And all of the sudden, the whole reason behind saying, "Well, why do we need an event in the first place?" is lost. So, here's where I'll say, if you remember nothing else, remember this takeaway on this slide. Key takeaway for you is events are a means to an end. They aren't an end in and of their own sake. And just knowing this will hopefully make your event planning better.

Now, let me go to Slide 13. Let me get specific and give you a few small steps that we have used in our planning and from our experience will lead you to a more successful event. I'll probably be giving you about 20 minutes on these and then we'll have about 20 minutes for questions.

There are six steps that I would encourage or challenge you to use: the first is to clarify your mission; secondly, identify your needs; three, define your goals; four, assess your resources; five, decide on your scope; and then six, set your budget and date.

And we've all been to presentations where speakers like me will rattle off a list of things like this and my experience is that if we were all sitting around in person in a conference room, this is where I'd see everyone's eyes glaze over: at this steps of things.

So, I would just ask you to bear with me. I'll tell you how this all relates to actually getting more impact from your fundraising event that you have coming up this spring or this fall.

First step on Slide 14, clarify your mission. This is incredibly important, yes, even for event planning.

Start with, what do you do? Why is it important? What's your vision for a better world? How do you achieve it? I guarantee you that if an event is a means to an end, your event will be better in proportion to how well and how precisely you can answer these questions. This is extremely important for you before you start talking about ice sculptures and table settings or before you start talking about the racecourse or the walking course, to think through, what do we do? Can we succinctly describe it to everyone else to the outside world--everyone that we want to participate or come cover us or come see us or come donate?

Because if you can't, you're going to have a real problem attracting people or getting them interested. The organizations that I think are doing the most effective fundraising programs--whether they're huge programs or very small target programs--are organization that can tell you who they are and why that matters.

You know, as an example, let me just make up something: well, we're the Michigan City Environmental Coalition and what we do is advocate for the citizens of Michigan City, Indiana to try to get for cleaner air, water, and living conditions in the city.

It's important because we all live here every day. We're citizens of this environment and the pollution here is three times greater than it is in the outside world.

What we do to achieve that is raise money from the citizens of Michigan City to buy land that we can set aside for preserves and parks. And what we do is try to spread the message to people in the community on why it's important to support us.

All right, I just made that up and all of you have much better answers than I do for your own organizations, I'm sure. But my point is if you can't in 30 seconds describe to yourself what you do and why it's important and how it makes a better world, you're never ever going to be able to get somebody to participate in your event. And you can look at a lot of the major events fundraising failures over the last 10 years and there have been some big ones. And usually the root of the failure starts here.

So, Step One, clarify your mission. If you already have a set of vision and value statements, this work is done for you. Fantastic. If you've never gotten around to doing that--because I know many of you are in small organizations and you probably wearing 10 different hats and you're typing and answering the phone while you're listening to this presentation--well, then let me say, let's this be an opportunity for you to revisit these questions because we're going to draw on them in the other five steps.

So, Step One, clarify your mission.

On Slide 15, Step Two, identify your needs. So, what specific problem are you trying to solve? And what you need to do to solve it? Why is an event the right tool?

Again don't start thinking about the solution, just what is the problem? Well, if I were in the Michigan City Environmental Coalition or whatever I said before, I might say one of the problems that we have is there's not enough open land that's set aside for the parks that we want to make.

And we have an opportunity to buy a one acre parcel. It's going to require a \$50,000 down payment. And we need \$50,000; that's' one.

OK, so we have articulated that there is a specific need that we have. And again, your ability to get people interested in and focused on your event and your ability to plan effectively depend on your ability to articulate what you need.

And one of the things that I want to bring to your attention that we'll talk about more in the next few slides is that an event is targeted to increasing advocacy is very different in execution than an event that's targeted at raising money. So, it's really important at this stage to get specific about what you need.

And if you do come up with a laundry list of, "Well, we need money, and we need press coverage and we more donors and we need more infrastructure." I might say to you, "Well, there are four different events right there, or four different programs."

So, identify your need. How does an event fit in? Is an event the right choice to solve your particular problem? Because it might not always be, it might not always be that it's the case.

OK. On Slide 16, Step Three, once you've clarified your mission, you can say here's what we do and then you've identified your needs. Here's this specific need we have.

Then you set a goal, articulate in measurable terms what you're trying to accomplish. And for a nonprofit, this honestly in most cases is one of two things: it's either we need to raise money or we need to increase our awareness.

The point here is to set a goal that's measurable and that you can articulate again and again and refer back to in your event planning process. So in the example that I've been using, our goal is to raise \$50,000 net that we can use to put the down payment on the one acre parcel of land, that we need to create more preserved ground, to help further our mission of creating a cleaner Michigan city.

And it all ties back to what we're trying to do as an organization.

Now go to Slide 17, I want to digress for a second here to tell you something very

important, that I think is very important at least. Let me say again, if you remember nothing else, remember what's on Slide 17, but that it's metrics affect outcomes.

Now think about this. The metrics are how you measure your goal: how you set, how you measure your goal.

So, if your goal is to raise money, there are a few ways you can measure that: gross dollar raised, or net dollar raised, or rate of return--very important everybody's worried about turning navigator and how many stars they get. Or maybe you want to measure average donations per attendees.

Now if you're doing an awareness of that, it's the number of names collected, the number of media impressions or maybe you're going to do a grant study before and after the event and you want to see if you increase name recognition or brand recognition.

Maybe you're doing an advocacy event, there's a whole other set of metrics. The point I want to make here is that each of these metrics, each of these sets of goals requires a different event.

It's a very different event, if I'm producing an event where the goal is gross dollars raised--and some organization have gross dollar goals--that's very, very different than an event that has a goal of net dollars raised. An event that has a goal of rate of return is very different than an event that has a goal that is in dollars raised.

So how you choose to articulate your goal and how you choose to measure whether you're successful, will, whether know it or not, have an effect on the decisions you make.

Now, I want to give you a piece of advice. If you're doing a fundraising event, and that's what this session is about, we highly recommend that you set a goal of net dollars raised.

So, in my example, we want to end up with \$50,000 to buy the one-acre parcel of land. Now, why am I saying that? First of all, back to the takeaway three: events are a means to an end. We're doing the event to further our mission, so phrase the goal in terms of the exact thing that's mission-related. In this case, the goal is not a 75 percent return on investment or a 25 percent cost of fundraising or raising a quarter of a million of dollars. The goal is to get that acre of land, and we need 50 grand.

This is, again, one of the differences between events that achieve their business goals for the not-for-profit and events that don't, in how you phrase this. Net dollars raised, if you need an amount, focuses you back on what your need is and what your mission is.

Now, what happens if you set a goal with gross dollars? "Hey, we just want to raise half a million dollars." Well, you run the risk of committing to more than you can spend when you're in the budgeting process. OK, "We're going to raise half a million dollars, come hell or high water." Well, you're likely to find out you've spent \$480,000 to raise that half a million. That's not good.

On the flip side, though, I want to just editorialize a little bit and say the intense focus on rate of return, I think, is incredibly destructive for a nonprofit space. Why? Because it focuses everyone on cutting costs. And if you've set a goal for rate of return, you're going to focus entirely on cost limitations.

And I want to tell you you can't cut your way to greatness. You can't. You can't shave your budget to a better world. It just has never been done before, and I don't think it can be done, at least in event fundraising. But so many organizations say, "I want to do an event, and I want to limit cost of fundraising to 25 percent." Well, I'll tell you what, you can limit cost of fundraising to zero percent: don't do the event.

So, in my mind, if you're choosing a fundraising event, net dollars raised is the best way to set your goal, because it does force you to focus back on, "What are we doing with the money?" which forces you to focus back on what your mission is: "How are we trying to improve the world?"

It's a little bit of digression there. And again, I'm happy to talk more about that concept because I know this is one that can be very controversial in organizations.

I'll give you a very quick story. But the one that we've experienced many times, and probably you have as well: the goal also depends on who you're talking to in the organization, right?

So, yesterday, we're meeting with an organization in Florida about a 5K walk they want to do. And following our own advice, I said, "Tell me about your organization and your mission." And then I said, "Tell me about your need." And I said, "Well, how would we determine success? How do we determine a goal?" Well, what did I hear from the director of development? I heard, "It's money." [laughs] What did I hear from the director of marketing? I heard, "It's awareness." And of course, what did I hear from the CEO? I heard, "It's both." [laughs] So that's very typical.

And one of the things that this step three does is help you get internal alignment. Now, what happens if you have three different stakeholders with three different opinions? Go back to step one. And that's what we did with the organization yesterday is, "OK. It sounds like we want a few different things from this event. Our experience is that might mean you need two different programs. Let's go back to what you're doing. Let's go back to what you're doing and why it matters."

And in the specific case yesterday, we sent them away with a little homework, and we have to do some homework, but I think we're going to find that they're going to set a goal based on dollars, because that's what's really important to them as they focus on trying to change the world. Now, I don't mean to say by that that awareness isn't a valid goal. I'm just saying it's different, and people disagree.

OK. Now, go with me to slide 18. This brings me to key takeaway number four: set the

goal first. Don't work on the budget until you have a goal. Don't work on the scope until you have a goal. And what do I mean by scope? It's all the list of things that you're going to do.

And to our story that we started with of the board chair calling you in January: scope was all over the place. "Well, let's do it outside, in the park, on Mother's Day." Those are all decisions about scope. "It'll be classy." That's kind of a scope comment. Well, set your goal before you start to work on any of that.

And certainly, don't set your budget first. Why? The budget's just a recipe on how to spend money. That's all it is. It's just a list of all the money you're going to spend. There's nothing good about that. And it's very common for organizations to say, "I want to do an event, and I've got \$25,000 to spend." Well, hold on, because I guarantee you that anyone can spend \$25,000, and some people can do it quicker and slower than others. So don't start with the budget. The budget just tells you how to spend money. Set the goals first.

OK. That leads me to key takeaway number five, which is on slide 19, which is: remember what we call the rule of one. You can only have one top priority. This is very important as well. I guess that every point I've made is important, so I probably sound self-important. But you can only have one priority that is the absolute top priority.

And you have to clarify that, and you have to be very specific about what the priority is, because, again, an event that's geared to netting \$50,000 is very different than an event that's geared to getting five stories in five regional papers. And when you say, "Well, we have two of the same priority, " or "These are equal priority, " how will you know where to put your time and your money and your people? You won't.

I mean, you've heard this cliché before, but when you focus on doing everything well, you end up doing nothing well. And it's the same thing here.

And it doesn't mean that you can't have one top priority with a bunch of supporting or secondary priorities. So, "We want to net \$50,000. But also, it would be great if we had a couple stories in the paper, and if we got 30 new people to the event, and if five of those 30 people registered for our mailing list. But when push comes to shove and we have to choose, we want to net \$50,000, so we'll make choices on sacrificing some of those other priorities if we have to."

Again, very important. We could spend two days just on that. But focus. And if you can't focus, it probably says need to go back to step one or step two and say, "Should we be doing an event right now?"

OK. Once you've set your goal, then it's important--I'm on slide 20 now--to just: step four is assess your resources. What do you have? Who's over-tapped? Who's under-tapped. And usually, in most not-for-profits, "Everyone is over-tapped and no one's under-tapped, and we don't have anything at our disposal." So one of the things that we're telling you is you have lots of things at your disposal; they just might not be the obvious things.

Everyone thinks about how much money we have as a resource. But obviously, staff is a resource. Volunteer network is a resource. Time is a huge resource. We'll talk more about that in a second. This is why you don't set your date first. Time is a resource, then the relationships, awareness, brand. Those are all resources that you have.

And the point here is: decide who's going to plan the event before you even decide what it's going to be like. So when the board chair calls and says, "I have an idea for an event, " what happens? You inherit that project. The way it should play out is, "Well, what's our mission? What are our needs? Do we have a goal? OK, who's going to get this done?" Because the answer to that question is going to help you determine when the event should take place, how much money you should spend on it, and how much time you're all going to have to a lot to it.

So if you're planning now, if you decide now for an event on December 1st, you're probably going to have to hire somebody from the outside, because that's a month away. But if you decide now that, "We'd like someone internally to do it. Well, that person's swamped. OK, that means the event can't happen in July." So the point here is just take a brief survey. And this doesn't need to take you a week. This can take a half hour of brainstorming. Just list out what you have at your disposal.

Then, once you've done that, go to step five, which is on slide 21: decide upon your scope. And scope is just the overall details of the project: what are you doing and what are you not doing? A really simple exercise that is sometimes great for group brainstorming, particularly if you have a number of stakeholders in your organization with conflicting ideas, is go to a white board or a piece of paper and literally draw a line down the middle of it. And on one side, write "Must have," and on another side, write "Nice to have."

And this is how you're going to corral all the people who start brainstorming about, "What kind of dessert we should have," and "We'll get the sous chef in from so and so, and we'll have crepes for dinner. And the table settings are going to be in black. No, I think they should be in blue velvet."

Hold on. What do we have to have? And what would it be nice to have?

Only start to look at this scope, only start to talk about the park by the lake and ice sculptures and place settings, after you've figured out what your goal is. Otherwise you risk getting attached to things that you just simply can't afford or that really aren't adding any value.

And we've all been through events that were wonderful, and it's great that we got to take home the place setting in the middle, but really did that place setting do anything for us; to help us talk more about the organization or its mission?

No, probably not.

So again, when you start to talk about scope, remember you're doing the event for some other reason, not for the event itself. Is it important that people have a good time there? Absolutely, no question about it.

But you have to see your decisions about what you're going to do in the context of what you want to accomplish. That's all I'm trying to say there.

And then finally on Slide 22, Step Six. Once you've done all of that and not before, then set your budget and set your date. Don't do what most organizations do, of setting the date first. Why? Because as soon as you set the date, you've eliminated one of your resources. Right?

And soon as you and Jean already decide on doing an event on Mother's Day, you have just put a finite constraint on all the rest of your planning.

So, we encourage groups to hold off on planning the date as long as possible. It's a little bit like, I guess on a different scale, but a little bit like anyone who's been involved in a capital campaign. You know you go through the whole silent phase. And the silent phase can take years in some cases: where you're raising money but not announcing it. Because you don't want to announce it and you have some critical mass.

Kind of the similar idea here. Don't figure out or don't tell the world when you're going to do this event until you have everything else lined up, until you specifically can articulate what your need is; how the event is going to address it; what the goal is that needs to be hit; and how you're going to measure it. Then you start looking at the budget and the date. You know?

Then the budget, I kind of already referred to this, setting the budget first just leads to a list of ways to manage costs. So, the budget is just a shopping list really. And it's not the most important piece.

And just to reaffirm that or reemphasize that on Slide 23, I have this again; you know, set the budget and date after you've done all this other stuff and wait as long as you can before committing to a date.

So, that is a very -- on Slide 24, just a brief summary. Let me summarize these points, and we've done really a week of content here in 35 minutes. I appreciate your attention and am really interested in your questions. And I hope I can help and would welcome, by the way, specific case study questions if you have them. So, if you want to give me some examples of things you're struggling with, I'll give you some advice on them.

But, a few key points, just to reiterate. Fundraising events need to be integrated into your whole fundraising program - your whole development program. Take a look at where you're raising your money now; who you're raising it from, how you're getting it.

And look for opportunities. Look for opportunities to leverage those things. Look for opportunities to target new things. But think of these things as all related. The events and even things that seem very unrelated, they're all one program because they're all emphasizing your mission.

Two, remember events again are a means to an end. We don't do an event just to have a good event. A good event is wonderful. But the event is designed to help your organization achieve its mission. Set your goals first, before you set your budget and date. Remember you can only have one top priority.

A really key point about metrics - different metrics will produce different outcomes absolutely. This is a law of how incentives work to focus people. So, you've got to be careful that you're setting the right metrics and the right goal in line with what you actually need.

And then finally events are transitory; missions are permanent. And I mean this in a couple of ways.

First I mean focus on your mission. Everything is about advancing your mission. And events are just a mile marker. But I also mean if you're going to do an event, you have to do it well, because people will remember. And we've all been to events, all -- probably everyone in this room has been to an event of some kind that has not been great.

And you put that experience on top of the brand of the nonprofit; rightly or wrongly, you do. So, everything that we do reflects back on our ability to achieve our mission. So, just remember that. The mission is ultimately the thing we're trying to get to and events are just the mile markers along the way.

So, wow I did it, 40 minutes. I can't believe it.

Jono: You did. Thanks Jeff. That was great. We'll give you a second to catch your breath, grab a drink of water, or whatever you need there. And we'll go right into the questions in a sec here.

Just a reminder, you can email your questions to Jeff at fundraising123@networkforgood.org. We've already received some great questions but we've got some time here, so go ahead and email us anything else you have.

And just a couple of reminders, in case you've joined us late. You will be able to grab an audio transcript of this call within about 24 hours at www.fundraising123.org. And then we'll also, over the next week, be having it transcribed into a text transcript. So, you can grab that probably in about a week at fundraising123.org.

And I wanted to also remind you that you can email your questions right now to fundraising123@networkforgood.org.

And finally I mentioned that I would put in a little plug for Network for Good at the end

of the call. You can sign up for a free 60-day trial to Network for Good online fundraising services. There's a banner there at the bottom of fundraising123.org where you can get more information.

Whether you want to set up a fundraising page for an event or some other fundraising campaign, we'll be happy to help you out with that. All righty, Shuck, are you ready for your first question?

Jeff: I am ready.

Jono: Great. We have a question -- let's see -- from Don. And Don asks, "What's the difference between cultivation events and fundraising events? How do you approach each?"

Jeff: Well just broadly, a cultivation event - the idea is to be welcoming. I don't want to say fundraising events aren't welcoming, but the whole idea of a cultivation event is to welcome people into your space or into your mission space -- I'm being metaphorical obviously -- whereas a fundraising event is designed to ask for a commitment.

And sometimes those two can be the same thing. If you have a group of people you already know that don't know much about you and haven't donated before. But often times it does make sense to, what Don is saying, separate those out.

So, just generally I would say what the answer is, the tone of them is very different. In a fundraising event, you're going to ask for a commitment or perhaps potentially you already have. A cultivation event, you're going to give someone more information about what you do.

And that some of the best cultivation events are some of the easiest to do. You know things like an open house, if you have space. And if you're working in the environment, it can be an outdoor open house, a reception, get to know you event, where what you're going to do is specifically not ask anybody for anything. You're going to tell them about who you are.

And so basically, if you can follow where I'm going with this, cultivation events end up becoming a cost center. Right? It's you investing money and getting to know people and helping them learn more about what you do.

Fundraising events should be a revenue center. And those are things where someone has already committed to spending money or has already raised the money. So it's a very different tone because you're, in most cases, that person will have already attached himself to the organization in some way. And you're following up on that or you're increasing their commitment or giving them an opportunity to increase their commitment.

But the other thing that I'd like to say about that is, to what we were just talking about and integrating all your efforts, it's a great idea to plan out cultivation events on kind of an ongoing basis and tie those in with fundraising events or integrate them in with your

fundraising event calendar so that you're always giving new people an opportunity to learn about who you are, and then giving those people an opportunity to donate. So, two different things.

Jono: OK. Next question comes from Becky who's writing from Georgia. This is an interesting question.

"Our organization hosts a benefit concert each year and hundreds of people attend because they care more about the artists generally, and not necessarily about our organization. The attendees are not donors, for the most part, and in the past they haven't responded to our direct mail appeal afterwards, attempting to bring them into the fold. Do you have any ideas of ways we can engage these attendees to become donors?"

Jeff: Wow, great question and I'm glad you asked it because it represents, I think, a very common problem. I'll give you a few different answers because you might not like my first one.

My first answer, honestly, is don't engage them. My first answer is, realize that that event vehicle, you know, realize for what it is. It's a fund raising tool that allows you to get money from people who don't care about you, they care about music. Then target your other follow-up efforts on other people. This is a great example of what I'm talking about when I say, "You can only have one top priority". Becky, you're not alone. Every organization has at least one event like this where they're hoping to create awareness, and at the same time to receive dollars.

So my first answer which you might not like is, "Don't...don't follow up with these people". Instead look at it strategically like, "Hey, this is a great vehicle for us to get a little bit of revenue from people who could care less about us, but they like music. So we're literally using music as a tool to get money from people who, otherwise, would not donate." That's my first answer. By the way, if you chose that approach, then how would you promote the event? You'd promote it by even talking more about the artists and you'd, maybe, add a second artist or, maybe, make it a longer music festival. You'd really talk about it like a music event. Get music fans there; you get money from it. What do you care if they know about you or not?

OK, that might not be a popular answer so the second answer is...it's going to be difficult, first of all, and set some realistic goals. If you're not taking my advice to just not worry about following up, and you want to follow up or you want the people who attend to get more immersed in your cause or start to care about you more. The first thing is set realistic goals. You're not going to get everyone who attends to contribute to you or frankly, to even care, probably. What is the goal, five percent...one percent? What does it mean if they respond to a solicitation afterwards? Or does it mean we just get their name?

So my second answer would be, again, probably not the specific answer you're looking for, but set a goal of just trying to get impressions. We're not going to set a goal of getting money from them later when we follow up with them. We're just going to set a goal of...we're going to go around and say, "Would you mind if we sent you more information

about who we are?" The basics of permission marketing, basically. Asking them if you can tell them more about what you do.

A couple ways I've seen this done or have done this very effectively. In the middle of the concert ask the artist to talk about you. This requires some coaching. This requires some management, depending on who the band is. But, you know, right in the middle of the set, before they take a break, the artist (not you) stops...or maybe with a representative from the organization says, "Hey, we're having a great time here. I wanted to take eight minutes or five minutes and tell you a little bit about why we're doing this." The artist gives a brief bio of what you're doing and while that's happening your volunteers are throughout the audience simply asking for peoples' addresses. You might be saying, "Well, we already have their addresses." That's not the point.

The point is, you're now asking for their address to tell them more about who you are rather than, "Well, we already have their address because they bought the music ticket". Because when they gave you the address for the music ticket all they cared about was music. So answer number two is, consider changing your goal from one of "we want a solicitation" to "we're just going to get them to tell us that it's OK to contact them".

Thirdly, and maybe the answer you were actually looking for me to get to is, you have to have a goal of soliciting to them, which you can probably tell, I don't recommend. But if you really want to get money from those attendees, first of all, be realistic about what that goal is. Is it five percent or one percent of the people respond to a direct mail campaign? Then you can set up the event structurally in some ways that people have to find out about you.

For example, there's, in most venues, even in park situations, you usually have to cordon off the place around the stage. So [indistinguishable] have booths set up that talk about who you are. Make sure you distribute fliers and materials to everyone who's there. Again, you're talking about taking on more cost. Those are things you can do really structurally to make sure people have to get a message around us. But, honestly, I'd gravitate to answer number one or two. Either be realistic about what that program's doing for you, and try a different kind of event program that's going to get closer connections for you. Or set a goal of just "we simply want to get the people who come to acknowledge who we are, and get them to sign a list that says, 'we'll follow up with you'". I hope that's helpful and, again, it's a very common problem that comes from, sometimes, trying to make an event do too many different things.

Jono: Thanks, Jeff. We're getting a lot of questions; some of them are along the same lines. I'll try and group a few here. This question comes from Casey, who looks like he's involved with an AmeriCorps/Vista program.

He says, "Our organization relies on over 300 volunteers. Many have the means to give money as well as their time. How can we organize an event to raise money from volunteers without offending those who feel as if their donated time is enough?"

Jeff: That's a great question. Let me say to the fact that we have a lot of questions...I don't know, generally, if this is possible, but I'm willing to stay later so if people want to stay past two o'clock eastern...

Jono: Absolutely.

Jeff: ...I'm happy to do that and I will be here. The second thing I want to say is, "I love AmeriCorps; I think it's a fantastic program. We have used AmeriCorps in some of our programs, and I really just applaud you for the work that you're doing. I think it's a wonderful, wonderful thing.

I've done this a few different times, and you're right, you need to be really careful about it. What's the first rule when you're worried about offending someone? Different people will say different things. Sometimes you just tell them, "Hey I don't want this to come out as offensive, but you've been wonderful about giving your time, and I wonder if there's anything else you can give to us?" That would be more of a personal appeal rather than an event.

If you were going to have a reception, say, for volunteers at which point you were going to ask them for money. Just calling everybody in advance and saying, "I want to come and recognize you, but I also want you to know that we need more help". What I don't recommend doing at all is what organizations, I think every organization, has tried to do once (including mine), and it always ends up ugly which is basically, trick volunteers into coming to a quote /unquote "recognition lunch" and then hit them up. That just leaves everyone feeling awful.

Let me give you another specific approach that's, actually, worked a lot better, for me, than just the, kind of, impassioned plea where you bat your eyebrows and tell them you need help. That is...we do a very large scale event called the "Breast Cancer 3-Day" that has thousands and thousands of volunteers across the country. Because the very logistical intensive event, we basically put a challenge out to the volunteers and say, "Hey, here's how much it costs to produce the event, and here's how much it costs to support every person, including volunteers. Would you consider fundraising the amount that we spend to support you here?"

Obviously, it's a very nuanced thing because they're volunteering to help you, and then you're turning around and saying, "Hey, you cost me money". You don't come out and say that. I'm condensing it. But there's a way of saying to AmeriCorps volunteers, "You know, we spend \$15 for every engagement everyday to support food. Would you consider helping us with that?" Again, I'm condensing probably a nuanced ask into something very brief for this phone call.

The point is, asking for a commitment that relates back directly to what they're doing. Say you were doing a clean-up project, and the supplies for this clean-up project are going to cost us \$1,000. Would you consider donating one percent of that? Ten dollars? Asking people to contribute one more way - I've found that to be very effective. You just have to be authentic about it. That helps if the person who asks is related to the group

themselves, and modeling the way helps a lot too.

If you get a volunteer leader of the team (I don't quite remember how AmeriCorps is structured, but I think I remember there are different teams) you get started with those leaders, and the leader says to their group, "I donated \$50 for the next year for the next set of programs that we're doing, I would encourage everyone to do the same." All of those things, I think work.

The last point on this is, given a little bit of time, because what you ultimately want to do is to create a culture where that is one of the things that volunteers do. Don't look at it in terms of the six month or year time-frame, set to look two or three years out. That's what we have found to be really successful in time-frame of three years.

It was a little awkward the first year, a little less awkward the second year. Now we're in year three or four of asking this, and our volunteers just raised half-a-million dollars. It's huge. But we've created a culture, and now they're proud of that extra giving. If you're interested, I can give you some more detail about that off-line.

Jono: OK. We've got about four questions that are along the same lines here. Several people have written in to say they've had a fund-raising event going for years, it hasn't been performing very well, and they want to know how to change that. Several people have written in to say they have a successful event, but they worry that it's no longer sustainable. Let me give you a few specific examples, and I'll have you comment.

Henry said, "My organization has begun planning our eighth annual gala fundraiser. In the past three years, it's been particularly successful with an auction that has raised (last year) \$45,000. However, I think the auction guys' idea is fizzling. I don't think we're going to be able to go back and raise the same amount of money, because auction donors are tapped-out."

Karen writes in, "What do you do when you would like to discontinue an event that started as a fundraiser, and in the past few years has turned into a minor fundraiser with a lot of time and energy that didn't produce enough money?"

Along the same lines, Lisa writes in, "I'm new to this organization. They have a long-standing event of 24 years that makes no money. I don't understand how it ties to our mission. [laughs] The group of very passionate people about a particular art form. When I came on-board to create their governance plan, I asked that they re-evaluate the event to make sure it ties their mission. They ended up picking a date for 2008 to 'give it another try.' How do you gently transfer the passion of these volunteers to something new that targets our mission, makes money, and lets go of something that no longer works."

Jeff: Oof! Three great questions there. Let me start with a general comment about all of them, which is going to sound a little bit strange because it's not a philosophical comment, it's a tool comment. One thing that I'd say to all three of you without knowing your specifics, and you probably have already done this, but one thing we worked with National Product a lot about is, don't be afraid of data.

It sounds like a strange comment after I just talked about mission for 45 minutes, but what I mean is we all have a lot of data available to us about our events, and numbers just scare everybody. They do. We work with groups and try to say, "You don't need to be a statistician to interpret data." Why I want to start with that comment is that in all three cases, my first response to all of you would be to say, "Tell me more, " or, "Can I see the attendee list?" or "Can I see the attendee and donation list?"

Speaking to the auction example first. It's not uncommon in an auction event for, I think she said they needed \$45,000, for all of the net to come from the auction instead of other things like the price of the table, or things like that. All of that goes to pay for the cost. Then, you're hoping against hope that the auction will perform for you.

It's also not uncommon in an auction setting for a couple of big donors to actually be the people who are spending all the money. If the board chair and his banker and a couple other people spent \$35,000 of the \$45,000. Looking at the data list - again, don't hear data and get scared - looking at the list of the people who bid on things the year before and won could tell you what is happening.

Do you basically have a major gift ask for three people camouflaged as a 200 person gala? It could be that you do, and if you do, look at those three people or three couples or whoever is really spending the auction money, and think about talking to them directly.

Now, some people have big egos and some people want to be seen in a group of 200 bidding \$10,000 on a weekend trip. They actually want recognition, they don't even want the trip. They just want everyone to see them doing it. But I think, just as many people, if you approached them and said, "We really care about what you're doing and what you have done for us. It's allowed us to do X, Y, and Z. Would you consider this next commitment?" Basically phasing out the auction component, or stepping up that person to the next level. This is integrating your event program with major giving.

To the same point about data and the auction. It could be, if you're seeing the auction and you've got 100 people bidding, and those 100 people are each bidding over \$100 or \$200, the event actually might not be in decline. It could be that it just needs a refresh. It needs different entertainment, a different date, or something like that.

So, my first piece of advice in deciding whether it needs a face-lift or not is go to that data list, go to the list of people who attended, match it against the list of people who donated things, and see what you see. If a lot of money is coming from a few people, consider, yeah, that you don't have a program that is delivering what you need it to.

Focusing on the other things, the event that has been going for 24 years and has done nothing, this unfortunately is really, really common. It's unfortunate for organizations, and it's unfortunate for someone in my profession, because it gives events a horrible rap.

Lots of times, events do need to go away, and sometimes someone has to be the one to

say that. Again, data can be your friend here. How many people are coming? How much are they donating? How much are we spending? Do we realize that we're basically investing in an opportunity to lose money? That's what we are doing here.

I'd start first with the trending in the list, who is there, by zip code if you can. It's always interesting to see where people are coming from, and why. Again, if you've got 500 people coming to this every year, I guarantee you there's a way to make money on it. If you've got 50 people coming every year and it hasn't made money in 24 years, I don't know about that.

Let me just say one more thing. I think there was a question in the middle and I don't know if I answered it well.

We just finished an engagement with a huge group. I promise you have heard of this group. They are nationwide, a very large organization in the top 400, that has a nationwide event program that was under-performing. They basically hired us to do an audit - "Look at our event program, tell us why it's not working."

It was a similar situation. We've been doing it for 20 years, and it's not really going anywhere, it's been going sideways. One of the things they told us is, "We don't know why, because the average donor gives \$135 and we have 30,000 participants across the country."

The first thing we noticed was they were doing way too many events - wow, hundreds of events. A lot of these probably are losing money, a few are making money, and that's why you're still making a little bit of money. But then the second thing is, by looking at the data we literally got a donor list, a participant list, for every event for the whole program. We're trying to get a finger on... They kept saying \$135, \$135. So, that was the average donation.

But then we looked at something called the mode. And the mode is the most present number. It's not the average; it's which number appears the most in the set of data. And the mode was zero. In other words, more people raised \$0 than anything else.

And so our advice to them on how we'd revitalize the program is really--it was really basic. It was let's make sure we ask everybody who attends to give us money. I mean this is like fundraising 101, but it's resulted in millions and millions of dollars for this program this year: more than last year.

And so, to look at the first thing I do with the 24 year old program that's not making any money, again go back to the participant list. How many people are raising what money?

And I don't know what kind of an event it is, whether it's a walk or a gala or something else, but--and then before you just say this thing is a dog. If the board is already committed to doing it again in '08, you might be stuck. But then say, "Wow, 50 percent of the people raised a goose egg or a zero.

So what are we going to do for that 50 percent of the people? We're going to specifically ask them for money. Now, one other thing and I'll stop talking about this, but it was really interesting when went back to this organization and said, "Hey, we have a simple solution, ask everyone to give you money."

You can't believe the resistance that we got. And it's the resistance that maybe some of you are feeling when I talk about this. "Well, but we want everyone to be calm and we want it to be welcoming and we want it to blah, blah, blah.

And you know I quoted their mission which was you know to end a life threatening disease--we'll leave it at that--and I said, "How much do you care about this?"

"Well, we care about it a lot."

And I said, "Well, what if I told you I cared about it a lot too."

And they said, "Well, that's great."

And I said, "What if I told you I cared so much that I'll give you nothing."

And they were offended.

And I said, "Well, that's what everyone who's coming to your event who's raising zero is telling you about how much worth your cause has. They're telling you it's worth nothing.

So, that has been an approach, again to that last example, that I have used with force before very effectively when people say, "Well, we don't' want to ask everyone for money. It's just about attendance."

No, it's not about attendance unless your mission is to get as many people as possible on Earth in one place at once. You know? Unless that's your mission who cares how many people show up on your event? It's about frittering what your organization needs to do: to look at who's attending.

There's a lot of people raising nothing. You can do some simple things to get them to raise some money. And be OK with half as many people coming. Because there is lots of precedence for events getting half as big the next year than they were the year before but raising twice as much.

So, hopefully I answered some questions in that rambling.

Jono: Definitely. Thanks, Jeff. It's interesting we've had two or three emails from folks who have recently inherited roles where they're responsible for either legacy events or new events and they have asked if you have any favorite books or websites or blogs or resources or places to go to get templates or for things like budgets, event planning, etc that can help with the very much beginner with no fundraising or no event experience get

started because they've been pushed into this role of having to manage an event pretty quickly.

Jeff: Hmm, you know I don't. And I don't mean that to sound--that's going to sound hopelessly condescending and I don't mean it that way.

But what I've really found is back to this idea to the old event paradigm and the new event paradigm, most of the fundraising text that I've read focus on this old paradigm which I think is not applicable anymore. You know you focus on making a list of volunteers and starting with the budget and a lot of things that I feel don't work anymore.

Honestly you know I think you'll be well served, and this is going to sound strange but, to seek out marketing resources first. And there are wonderful, wonderful, premarketing resources out there for those who wish to learn more about making your brand real. And that's what fundraising events are. Taking your mission and making it real.

And so I would actually--it's a longer road. I want to be honest. And I know the people are probably asking for a budget template, but I would say before you go there--read what you can read about marketing. There are some wonderful books out there. If you've never read "Purple Cow, " by Seth Godin, it's a great, great book about being different and being unique. Will it specifically help your event? Probably not. Will it help you think about your organization differently? Definitely. That's a book I constantly recommend. It's a very easy read: very accessible read and should hopefully get you scribbling in the margins about what our organization is and what we want it to be.

Also, the Sloan School of Business at M.I.T., --and again you're probably thinking, "Business school? Good Lord." But the Sloan School of Business has a wonderful--it's called Open M.I.T. Every text for every class that they have, all the lecture notes, everything is available for no charge. And as I'm fussing around here I'll try to find the U.R.L. for you. But it's just an incredible resource.

And again, why start there? Because the first thing I want you to start with in inheriting an old event or a legacy event--I want you to start with the first step which is Step One: clarify your mission. Who are you? What are you trying to get at? Can you say it in five sentences?

Here's who we are. Here's who we serve. Here's how we hope the world. Here's our vision of what the world looks like when we have done our job. You know, four sentences, can you say that?

Then I want you to start thinking through what the goal is. Why does your event exist? Hey, sometimes it's a necessity: 20 percent of our operating revenue comes from this event.

OK. The event exists because we have to have this event to stay open. Fair enough. Wow, great goal. Good to know.

Then start working through and honestly get to the budget last. When you've done that then, you know, there are probably some other texts out there that can help you with fundraising.

Again not specifically an event text, but a classic fundraising text that I really recommend to everybody is "Beyond Fundraising" by Kay Sprinkel Grace. It talks about talking about what you do instead of what you need: great book.

There's a book--I've not read it yet to be honest, but it's sitting on my shelf looking very interesting-- called "Fundraising for Social Change" by Kim Klein. I'm embarrassed to say I haven't read it yet, but it's kind of a big book.

And both of those two last books have some templates there for budgets and things to consider and everything else.

If all else fails you can always shoot an email to your friendly neighborhood Jeff Shuck and I will, you know--I will not charge you a dime at least to give you some pointers on some things to do next. So, I'll put that offer out there. I promise you won't get a clumsy sales pitch in response.

So, hope that helps.

Jono: Yeah, absolutely. I was just going to add a couple of points there.

You know this is something that I come across from time to time where, you know, I need a template or just a bit of inspiration for a marketing campaign or program we're doing. And two places that I always go are Google's blog search and Google's books area.

If you go blogsearch.google.com, and you type in the phrase you're looking for in parentheses, you know be it an event template or event best practices, I guarantee you that there's somebody out there who's blogging on the topic or sharing a best practice or a story about a recent event they were involved with. You know, it doesn't have to be a nonprofit event. We certainly advocate stealing the depth of corporate marketing savvy and applying those principles to your nonprofit market plan.

And the second area is Google is digitizing a number of books, a ton of books about marketing and fundraising. And if you go to books.google.com and do the same thing: type in your search phrase there in quotes, and you can often just grab a really quick preview, sometimes even a full excerpt of a book or a template on the topic you're looking for.

Jeff: Hey Jono, I agree with everything you said and the link for M.I.T.--OpenCourseWare is what it's called and it's ocw.mit.edu. And then you can click on management and get to the Sloan school and you'll find all kinds of stuff there and on marketing, including some stuff on management in the nonprofit sector too. It's very interesting.

Jono: Absolutely. And actually that's the research I've used before as well. And you can get everything from lecture notes to PowerPoint presentations from these courses and it's really valuable.

We've had a couple of questions, not surprisingly, about corporate sponsorship and engaging corporate philanthropy with your cause.

Heidi, for example, says, "We're trying to work away from a culture where our board and lead volunteers believe that an in-kind gift, ticket purchase, or sponsorship of an event replaces a direct gift to our annual campaign. What advice do you have to communicate a message that while the in-kind sponsorships are appreciated, they don't replace the need for direct contributions.

Jeff: Well, that's a great one and let me just say you're ahead of the curve in even realizing that dynamic, so I applaud you, the person who asked the question because most organizations I feel--well, not most, but some are just so falling over themselves to get free bagels for their event.

And I think the first step is knowing what you just said, which is you know there's dignity and nobility in what you're doing and you know kind of free coffee and food is the least that people can do to help you with that. So, you know Step One is pride, which it sounds like you have and that's fantastic.

Step Two, I think--well, let me address the larger issue and then try to come back to your issue. Just so everybody knows and those who are not familiar, here's one of the challenges with chasing sponsors right now.

Cause marketing is the fastest growing field of sponsorship. Sponsorship is about \$13 billion of the \$50 billion in experiential marketing that I told you about. And about 1/10th of that is in cause marketing, so sponsorship from for-profits to not-for-profits.

And the rest of the \$13 billion in sponsorship is business to business: you know it's Visa sponsoring Major League Baseball and those kinds of things. But sponsoring in itself or whatever--I guess it's Coors light. I don't know what it is but--so and the cause marketing of corporations and not-for-profit is now a \$1.4 billion industry. It's growing at twice the rate of regular sponsorship. Why?

Well, because of all the trends that we talked about back on Slide Nine. The traditional ways of marketing with television/radio don't work. They're not working anymore, so organizations are trying to find other ways of getting an impact. That in turn means the good news is that there's more organizations than ever involved in cause marketing. So, there's more dollars than ever in that field.

The bad news is over the last 10 years, corporate participation in not-for-profits has really switched. It used to be, especially in big corporations, that they had a foundation arm that just made grants.

Well, over the last 10 years the decision whether to work with a not-for-profit has moved from the foundation arm to the marketing arm. So, the marketing arms of corporations now, particularly when you talk about the big dogs, are the ones making the decisions about where to participate.

Why is that bad news? Because of the dreaded words that we all hate to hear from our corporate sponsors: ROI. Marketing firms are now looking at--or corporate marketing groups are looking at cause marketing as a marketing opportunity for their company: not as a donation anymore. So, that is really important to know. That if you ever go to IEG or AFP, you'll hear people talk about this.

Very important to know that first and foremost as you probably know the business is looking to get something from their relationship with you. So, that's the first step, back to the specific question in combating the focus on in-kind is being able to go back to the business and say, "Well, here's what we're providing you. You know, you're able to get--you're getting top billing in the program: we're mentioning you four different times. And by the way, all 500 of the people at the event live within--going back to data--live within one mile of one of your stores and they all eat bagels.

So, we think that the value that we're providing you is worth more than free bagels. So to a certain extent, I'm saying, you know, my first response is kind of fight fire with fire because the businesses are looking at this as a business decision, in most cases and even in the small cases, even when it's the business down the street who's like, "Oh, well I need to donate this to them because I donated to the other group." They're still thinking they're going to get something out of it.

So, don't be afraid of stating your case. And have you data together and know what you're case is. I just had been talking about Barry well not-for-profit in my home town in Michigan City, who's trying to deal with the local grocer here.

And the local grocer has four different stores. And they do a very small event and the not-for-profit has a 500 person race and they're a 5K. And it brings in like 30 grand. And they're getting push backed from this grocer who doesn't want to give \$2,000 to the event.

And I said, "Well just look at--let's get a zip code list of everyone who participates and chart how far or close they are to one of these grocery stores." And it turns out, you know, that 90 percent of the participants live within a five minute drive to the grocery store.

So, we're going--I said, "Go back to the grocery store and say, 'This is not about a donation on your part: this is advertising. All these people have to buy groceries. You want them to go to Jewel or do you want them to go to Al's?'"

We want them to go to Al's because you're part of the community just like we are. So, part of it is put on the business hat. Do not be afraid to tell people with a value that you're providing to them and back to the book "Beyond Fundraising" by Kay Grace, and she

talks about don't go in there with a tin cup and say, "It would be really wonderful if you gave us this money."

And so that's my answer too about how do you work to change the culture on the board. A little bit again, my answer is pride in this idea of people who give us \$0 to walk in an event or people who give us an in-kind donation of signage, you know, "Great thanks for the in-kind donation of signage [sarcasm.]: \$500 a signage to have top going one of our big events."

You know they're saying that's all that our cause is worth to them. And we're saying back to them that it's OK, that the cause is only worth that.

I'll tell you, let me--now that I'm just, you know, I'm firing guns blazing--let me be practical though. It is difficult to make the transition. And one of the things you need to make the transition is to be willing to lose some sponsors. So, I don't want to just sound like all buster and bravado because it can be difficult and you can lose some groups. But you made the transition by talking about the value that you provide instead of the value that you need.

I hope that helps.

Jono: Absolutely, thanks Jeff. I think we've got time for about two more questions.

And I think this is a great one because it's about house parties. And what's the current wisdom about house parties as fundraising events? And I had to laugh when I received this message because Jeff and I participated in several house party fundraising events many years ago that were quiet successful. So, I'm interested to hear what your answer is. What is the current thinking about house parties as fundraisers?

Jeff: Well, I'm biased and yea, it was way too many years ago to think about. But I'm biased: I love house parties. And frankly I think they're underutilized right now. They were very popular 10 years ago or so and we've kind of--you know mass participation events, bike rides and the AIDS rides if anyone has ever done one of these is big on house parties.

I don't have a lot of experience with house parties these days. I have a lot of experience with home selling and direct selling which seems to be increasing. But I don't see a lot of groups doing house parties. So, you know I think do anything that other people aren't doing. You know? Use any tactic that the people aren't working. We are not doing any with anyone right now ourselves so really haven't found the right match. But, there's a lot to be said for that personal ask.

Now, you probably already know some of the basics of how the house party is. We kind of alluded to this with volunteer things: never invite someone to a house party without telling them what it is. It's never good and never works to invite people over for "wine tasting" and then someone stands up and talks about giving to the environment. That never works. So you send an invitation out and you say, "Come have fun and do some

good. We're going to talk to you about the work we're doing and give you a change to support it."

You know, so that, in my past, has done very successful. And then of course, all this stuff about normalizing applies. Which means; you don't have to run around a hat and tell people to give whatever they can afford because everyone's going to look to their right and if everyone else is putting in a \$20 bill, they're going to put a \$20 bill in.

You suggest a donation, and then you engineer it back to the work you're doing. "Would you consider a gift of \$100? A gift of \$100 will help us take care of five endangered species for a day" or whatever is it. They can be very successful. Groups of 20 or 30 are where I'd target to. Too few people are as bad as too many because it's very awkward either way, but, 20 or 30 people. And then of course, you want to rehearse the pitch a lot. Because you want the speaker to get up and speak about 10 minutes and have their stuff down and talk about stuff. What's your mission? How do you achieve it? What's your vision of a better world? All of these things are really important.

But I like house parties. I don't see a lot of them happening right now, so I say give them a try.

Jono: That's good to hear. And just to add a personal story there; it was about seven or eight years ago that I was raising money for AIDS vaccine research and Jeff suggested a house party of our co-workers actually, to raise money for the cause. I was a little bit skeptical of the house party and I was even more skeptical when I saw that their invitation warned people that we would be asking them for money. And I think at the end of the night we had collected something like \$7,000 from a group of individuals, many which who'd never given that large of an amount to a cause before. So it's amazing what you can do when you call up some of these practices that Jeff's suggesting and actually ask for a donation.

OK, our last question is a really, really interesting one. It comes from Ann. Ann asks, "What advice do you have for organizations to deal with controversial issues? For example; women's reproductive rights or gay rights who's sponsors, perhaps, have become victims of harassment because of the cause that they support. As corporations are moving toward making gifts take on marketing instead of mission, are such organizations doomed for corporate partnerships and so on?"

Jeff: That's a great question and a good one to end on. No, those organizations are not doomed at all. And the trick is; finding the right relationship. And you know, my first piece of advice to the first part of the question -- and again, maybe a little contrary to what most people are saying out there, I don't know, but -- be who you are. Be proud of who you are. There's a need for all the organizations out there and there's a need for ones that are pushing topics that other people find distasteful.

Don't try to cultivate unanimity. Don't try to cultivate harmony. If you're in one of those causes, be who you are. Think about act up's 20 years ago, you know? Some people liked their acts, some people didn't. But you know who they were, you know? Sometimes if

you are one of those groups that polarize the community, yes, you can say half the people hate us, but then half the people love you, you know? That's much better than being vanilla ice cream to everyone.

So to point one, the idea of a mission, my advice to groups is be who you are. That is different from what you're going to hear from some people, so, maybe you want to get a second opinion. But, I think, when you try to be everything to everyone is when you end up being nothing to no one. That's the first thing. Then specific to your question, again, are you doomed for sponsors? No, not at all. You just have to be authentic, be honest, and find people who are a real authentic and honest match.

How do you do that? Start with step one. Who are you? Clarify who you are. Get it down. Get it down to a sheet of paper or a warm Power Point slide. You just want to keep harping on this. This is what we do, this is why it matters, here's how we change the world, here's what the world looks like after we've done it, here's how you can help. Then, you take a little bit of ingenuity, and this is why I'm recommending books on marketing and the purple towel, but whom else is doing that too? It's a stretch.

One of the examples was reproductive rights. You could go a lot of places with that. And who knows if any of these things would go, but I think of reproductive rights, I think about; we're trying to get women to be allowed to be who they are. Well Dove just ran -- we're talking a major group -- just ran a whole campaign for a year and a half about real beauty. I'd go to Dove and say, "You're about helping women be who they are, we're about helping women be who they are." Now, Dove might say, "I'm not interested in that at all." My point though is that we're trying to distil the essence of what you're doing and then find organizations that are selling the same thing and then being able to prove to them: "This is why this is important to you. This is why we are who we are."

Now there's a whole different kind of ugly, not talked about side of cause marketing or cause sponsorships. That is the unlisted donations. And you find it a lot with pharmaceutical companies. There's nothing that polarizes people in the not for profit sector as much as pharmaceutical donations. And should you take them or should you not?

And lot's of groups do take them and don't credit them to the organization and don't talk about them. You know, that's a cultural thing that you only decide. So, in other words, you could do businesses and say, "We really need you money and we won't tell anyone you gave it to us." My advice, you can probably already tell from hearing from me for 90 minutes, I think that's not going to serve you well in the long run, you know? Because it gets you in this culture of guilt almost, about what you do, you know?

Be who you are, be proud of it. And in certain cases, yes, you might have a harder time getting corporate donations, so built up your other ways of reaching people, but don't write off that program. It just takes some ingenuity in finding the right matches.

Jono: Great. Well, Jeff I really want to thank you so much for donating your time today in addition to all of the great questions we've received on email. A number of people have

just called in to say how much they got out of today's call. Stanley said, "Great details, presentation, honest opinions, and answers to the questions." So, on behalf of everyone on the phone, thanks very much for your time today.

And the best part about it is if you missed any of the call or if you want to share the call with one of your colleagues, you can download that mp3 file which you can burn to a CD, listen on your computer, your I Pod, whatever works for you, at fundraising123.org and that will be there within 24 hours. And then the text transcripts, again, within about a weeks time.

So Jeff, any final comments from you side?

Jeff: No, just thank you. Well, yes, very briefly; thanks everyone for your time. I really appreciate it. And to the theme of the whole presentation; thank you for what you do. There aren't a lot of people engaged in work to make the world a better place. And the work that you do has meaning and it has the ability to it.

Don't get discouraged, you know? For programs, they aren't always great, and the great ones, sometimes they just lucked into greatness and sometimes it took a long time to make them great. So stay strong, stay true to who you are, and don't get discouraged.

Jono: Great. Thanks very much, Jeff, and we look forward to speaking with again on our next Nonprofit 911 call. Please stay tuned to fundraising123.org for the date and time of that call. Thanks again and have a great day everyone.

Jeff: Thanks.