Rebecca Higman: So now, I am happy to introduce our speaker Terry Axelrod. Terry is the founder and CEO of Benevon and she has worked in the fund development field for 30 years.

In the early 1990’s, she served as Development Consultant to an inner-city school in Seattle where she designed and implemented the fundraising and marketing programs which raised over $7 million in just two and a half years. And that included a one hour breakfast event that raised over $1 million itself. The program was actually featured as a cover story on “The Chronicle of Philanthropy.”

Terry is sought after both here in the US and abroad as a speaker, and we are really excited to have her join us for her second Nonprofit 911 with us today. So for those of you who missed it, I would definitely encourage you to download the transcript from her May, 2009 call with us.

Her style really is to take a fear out of individual fundraising and provide all of you participants with a practical and doable system for long term financial sustainability.

And just a little bit of background about her company Benevon. Benevon trains and coaches nonprofit organizations to implement a mission based system for raising sustainable funding from individual donors. This system ends the suffering about fundraising and really builds passionate and committed lifelong donors.

So without further ado, I am really excited to turn the floor over to Terry to get us started.

Terry Axelrod: Thank you so much. A pleasure to be with all of you today. And I am so excited about the Network for Good custom Donate Now and
that two for one offer. I hadn’t known that was going to be part of today’s call, so wow! That is a pretty neat opportunity.

And I am very excited to be with you all to talk about maximizing your organization’s fundraising potential this holiday season. I have been writing and teaching and doing fundraising for many, many years, and I have always felt that the holiday season really is such a ripe time for both cultivating and asking donors for money that I have written quite a bit about it. And actually, one of my books, which I will mention at the end, has a whole chapter on making the most of the holiday season. And we have a lot of good materials on our website Benevon.com relatable to sustainable funding, and also, holiday fundraising.

So this is a topic that is near and dear to my heart. Let me give a little bit of background and then I will give you an overview of how I would like to spend our time together on this call, of course which will include the opportunity for questions near the end of the call, which is my favorite part.

So I want to start by talking about why I think the holiday season is unique and a wonderful opportunity for fund development. Then I would like to give you an overview of the Benevon model, a brief overview. The more detailed description of the model was covered in the last Nonprofit 911 call that I did with network for good, which is available on their website if you would like to download that. So I am not going to go into the kind of depths about the Benevon model that I did in the first call.

Then I would like to talk about what we call four kinds of events, a nomenclature, a structure, a design that we have for fundraising events, and then point to how each of the events and opportunities that you have over the holiday season can be missionized so that you can incorporate them into this model to build long-term relationships.

So often at the holiday time, people think about what I would call “transactional fundraising” where people are anxious to go out and ask for money quickly. And I find quite the opposite, that this is actually a wonderful time to be cultivating those relationships and going deeper with people who you will later cultivate more even next year and ask for more money next year as well.
So what makes the holiday season so unique? And I am going to be referring to some notes that are in my latest book, which is called “Missionizing your Special Events,” and you can find it on our website Benevon.com, and the chapter that refers to making the most of the holiday season.

So what makes the holiday season so unique? First of all, I mean just think in your own life. This is the time of year when people really connect with each other. We are starting to get more invitations to social functions, whether it is business, or personal, or charitable events.

I just noticed in the last few nights each night there has been a different social invitation or more than one invitation, more invitations coming in through the web. Whether it is next to the punch bowl at a holiday party or by mail or by phone, this is a natural season of communication. It is really a ripe opportunity to be just chatting up people about what they are up to these days.

Secondly, the holiday season is the one time of year when we are generally encouraged to be kind, and generous, and caring towards others. Obviously people feel that way throughout the year, but we can kind of let it rip when it comes near the end of the year.

This is the time to take extra pleasure in helping other people, whether it is faith groups, employee groups, families; everybody is looking for projects to take on that will demonstrate their compassion and allow them to really connect with people who are in need, whether it is food baskets, toys, just giving time to listen to others. People are giving time. They are giving in kind goods. So this is a natural season for people to express that goodwill.

And then third, the third reason that I feel that the holiday season is such a unique opportunity for fundraising is because it is the natural season of giving money, punctuated by the end of the tax year, people are taking stock of how they have done financially this year or not done financially this year, and many people are choosing to make their financial contributions before the end of the year.

The first place they are going to be giving are the places that are their special charities. I call them their “Default” charities, those that they have remained loyal to over the years, whether it is their university or their church, but a core short list of nonprofits that people always give to. They really feel
connected to those organizations emotionally, and that is a key phrase to remember as we go through this call, organizations that you feel connected to emotionally. You don’t have any question that you are going to give to these places.

And if each of you were to think for a minute about places that you already know you are going to be giving money to before the end of the year, odds are they are not organizations that are brand new to you. The first line of charities you would give to would be those ones that are your nearest and dearest. And then there is the second tier that may be groups that you have become involved with more recently, maybe in the last few months or in the last year.

But then there is that last stack, you know, the new people that are approaching you, that are sending out those mailings. Are you really going to be giving to any place new? I would suggest that this year most people are not. Most people are not going to be looking out for something new. There first priority is just to continue to support those places that they already believe in.

So the Benevon model is designed to connect your organization, to engage and develop relationships with individual donors who will become long term donors for your organization. So this is not a call about how to find fast donors who will give you to once to sort of save you at the end of this year.

Our whole model, our whole approach, is how to engage and develop relationships long term with the right individual donors. By right I mean…I don’t mean the super wealthy people, necessarily. I mean the people who are right because they care and believe in your particular mission.

So if you received the handout that was emailed to you in conjunction with this call when you registered, take a look at that right now and you will see that our model is a circle. It is a four step circular process for engaging and developing relationships with individual donors.

And the first step of it in the upper left hand quadrant is where we introduce your organization to new people at what we call a “point of entry.” Now at point of entry, the whole purpose of that first event in step one is not to ask anyone for money. It is to tell them the story of your organization. It is to engage them. It says on the handout: “The facts at the most basic level and
to give them an emotional connection, an emotional hook, that they will
never forget, and to capture their names with their permission.”

So the people who come to the points of entry have been invited word of
mouth by a friend. And think about the holidays. When I come back to this I
am going to talk about how many opportunities there are throughout the
holidays to invite people to these points of entry.

But the point of a point of entry isn’t to ask anybody for money. It is just to
show them your wonderful work. So it is usually done in the form of a tour,
and we help groups to craft and customize, especially groups that have
complex missions or sort of policy groups, advocacy groups, research
groups, groups where it is not really obvious or if the work is very
confidential and they can’t just take you around and show you the cute kids
that you got there or the little puppy dogs. How do you convey the impact of
your work in a one hour introductory “get acquainted” session with people
so you are not asking them for money?

This is the cornerstone of the Benevon model. Think about if I were to come
to your organization and say I would like to take a tour. Some of you would
go, “Come on right in! We are all set for you.” And others of you would say,
“I don’t even know what I would show you. We don’t even have a place. We
don’t even have a building.”

So we help groups to customize that one hour and make it life changing for
people. So just hold that thought as I go through this now. The second step
in the model is a one on one telephone follow-up call with every person who
has come to that one hour point of entry within a week afterwards. And in
that call you ask them several key questions. You don’t just send them a
letter to say, “Thanks for coming.” You call them and ask them several key
questions to determine how seriously interested they are in proceeding
around the circle with you and your organization or not.

If they are not interested, you bless and release them, which his kind of
paradoxical in today’s world. You think, “What do you mean? Let go of
someone who just came to something to learn about us? Don’t we even send
them a little letter or don’t we ask them to send in a little check?” No. If you
adopt this model of fundraising, you are never looking for a one time donor.
You are really looking for the people who want to stay with you long term.
So in the follow-up call, you ask them five questions. You say, “Thank you for coming,” which isn’t a question. You just start by saying, “Thanks for coming.” And you really got to mean it when you say that. And then, “What did you think? What did you think of what you saw on the tour?”

Then be quiet and listen; that is the third thing. And then, “Is there any way you could see yourself getting involved with us? Any way at all that you could see yourself getting involved with us?” You don’t have any hidden agenda. You are not looking to recruit board members or new students for your school or volunteers. “Is there any way at all you could see yourself getting involved?”

And lastly, “Is there anyone else you can think of that we ought to invite to a similar point of entry?” Now you don’t call it a point of entry. You give it a much warmer and more inviting name, something that is more engaging than that.

At the follow-up call, if they are not interested you are going to let them go. We say you “blessed and released them.” You let them go and you truly take them off your list. You don’t mail them things. You don’t bother them again. That is it.

Or, if they are interested, you proceed around the circle to the third step with them, which is where you ask them for money. Now between steps two and three, if you look at the circle chart that you have, it says, “Cultivation superhighway.” That is where we hasten the ripening of the fruit, so to speak, before you pick the fruit at step three.

So many of you know. The old style of fundraising was you would come to something like a point of entry, but it wasn’t really a point of entry up in step one. It was a point of ask. It was, “Hello. How are you? Let me tell you about my great organization and please get out your checkbook.” It all used to happen too fast in step number one.

So in our model you want to wait until the donor has been cultivated enough before you ask them for money. So that white space there on the chart between steps two and three where it says “Cultivation superhighway,” that is how we have the donor get more cultivated and warmed up before being asked.
And how that happens in our model are with individual contacts. There are many opportunities for that over the holidays. There are many times when you are going to be seeing people, potential donors, former donors, board members, lapsed donors, volunteers. You are going to be seeing so many people over the holidays that each time you see one of those people it could count as a cultivation contact if you learn more about them, engage them, find out more about what they are doing, ask them some questions, and really see how there interest meshed with your organization. If you make cultivation contact customized and personalized, it will help to ripen the fruit so that by step number three when you finally ask for money, those same donors will be wondering what took you so long to ask them.

So step three in our model is asking and it happens either one on one or at an “Ask” event, and some of you may know about our Benevon style ask events, which are a free one hour ask event. So this is a breakfast or lunch. It is not a dinner. It lasts for 60 minutes only, not an hour and a half. People are invited word of mouth by a friend with a table captain at this event, and they are told in advance that they are going to be asked to give money at this event, but there is no minimum and no maximum.

So it is free to come. You don’t have to come with your check already written out. You don’t have to buy a ticket or underwrite a table; none of that. You truly get a free breakfast or a free lunch and you are told in advance you are going to be asked to give by the end of the event, but you don’t have to give at all.

In our formulas at Benevon, we have been doing this now for over 13 years with over 3,000 groups. We have a lot of formulas and math behind this. Our formulas would say that for every 100 people who come to the ask event, 10-15 of them will join your giving society at the end of the ask event. This event is very tightly choreographed, one hour, extremely passionate. Your visionary leader, who is your CEO or Executive Director or head of your school, that person will share personally why they are involved and talk about their vision for the future. There is a seven minute video that moves people to tears three times at least, and then a live testimonial from someone whose life has been changed thanks to your work.

So by the time you get to that one hour ask event at step three of our model, people are ready to be asked to give. And the pitch person, which is a very tightly scripted pitch, invites people to become a member of your giving
society, and there are three giving levels, starting at $1,000 a year for five years and going up from there.

And I know some of you are thinking, “Well we are way too small for that. She doesn’t understand our community.” We still say you have got to use the levels, and this is all written up in our books and on the tape that you will listen to if you click on Network for Good and go and hear the first longer version of this program that I recorded for them the last time we had a conference call.

So by the time you get around to asking at this point, of every 100 people who come to the ask event, 10-15 of them should join your giving society. So maybe 10 people out of every 100 will be making a pledge to give you $1,000 a year for five years.

Now that is not an accident. That is because those are people who came to the point of entry who were well cultivated. And another 25-30 will be giving something that day. So there is also a box on the pledge card besides the three top levels, the $1,000 a year, $5,000 a year, $10,000 a year level for five years; they are making a five year pledge. In addition to that, there is also a fourth box on the pledge card for people who can fill in the blanks. “I would like to give you $100 a year for two years or $10 a year for four years”; whatever they want.

The last box says, “Please contact me. I have other thoughts to share.” And that is for people who don’t want to write a check that day. They want to go back and sell stock or transfer money or get more involved as a volunteer with you.

So by the next day after this wonderful ask event, you are on the telephone calling and thanking people for coming. The people you are calling are the people who just gave you these big gifts the day before and they are darn excited. They are saying, “If I had known how great that event was going to be or that I was going to give you all that money, I would have invited some other people to that ask event yesterday.” And that is your opportunity to say, “Well we would love to have you still do that. Would you like to be a table captain next year? And the way you can do that is by, between now and next year, make a list of the people you would like to have sit at your table and you can introduce them to our program by inviting them to a point of entry,” back up at the top of the circle.
So step four is “Introduce others,” and then you do that by inviting them to a point of entry back up at step one. And after that, we will educate and inspire them. We will call them and follow-up. If they are not interested we will bless and release them. If they are interested we will cultivate them so by the time they are back at the ask event next year, step three, they will be the ripened fruit people who are ready to give money or they don’t need to give at all.

So that is the Benevon model. OK. It gives you a systematic process for engaging and developing relationships with individuals who will stay with you over time.

Now if you look at that same handout that you have, I would like to talk for a minute about the kinds of events that occur in our model as I move into talking more about how this would apply over the holidays.

So there are four kinds of events in the Benevon model. The first kind of event, as we said, is the point of entry, up in the upper left, “The point of entry.”

The second kind of an event is down in the far right, step three, which is the “Ask” event. The third type of an event is the lower left hand quadrant, which is something we call a “Free feel good cultivation event. I didn’t mention that before, but a free feel good cultivation event is a program related event.

So if you are doing a holiday pageant, if you are a Christian school, for example, and you are doing a holiday event, a Christmas pageant, say, that would be a natural program related event that you are doing at your school. You could invite donors. You could invite people who already are giving to your school and love you to come and attend that event. It is not a separate party. It is not a social event. It is not something new you have got to cook up special for the holidays, but a program related event that is a free feel good cultivation event where you invite your donors and you include enough of the facts and emotion. So you have a little speaker maybe talk for a bit.

Like at the school where we started all this, our free feel good cultivation event was our graduation, because we had to have a graduation anyway. And we had the principal…We had a little reception in the little room next door
to the big auditorium. And we invited all the donors, and we had the principal speak about the test scores and the grade point averages of the kids who were graduating. And then we heard from a grandmother and her grandson about the impact of the school on their life. And then everyone, all the donors, were invited to go into the big auditorium for the main graduation, which was fabulous.

So you see, a free feel good cultivation event, step four there in the chart, serves as a point of re-entry. And just like a point of entry up at the top of the chart, it gives people the facts and the emotion, like the grandmother and the grandson, and then ultimately, you can follow up with them just like you would after a point of entry and continue to cultivate them and go round and round the circle.

So far I have told you three kinds of events that are used in the Benevon model. Let me back up and review. In step one there is the point of entry. At step three there is an ask event. At step four there is the free feel good cultivation event.

Now there is one other kind of event that is not on your chart. And if you have the chart printed out, you might want to write this in. It is kind of up near the step two part. I call it a “point of entry conversion event.”

A point of entry conversion event is what most of you would call a fundraising event. So if it is a gala, or a golf tournament, or a little auction, or a fun-run, any kind of event that you are already doing as a fundraising event, we say, and that is the whole subject of this book that I mentioned earlier, “Missionizing your Special Event”, that every event you do, if you are going to bother to do it at all, you need to include your mission in that event. Otherwise, there is no point in having the event.

Most nonprofits are not in the party planning business. They are in the business of serving people and making the world a better place. So you don’t need to be putting on parties.

But a point of entry conversion event is an event that is like a fundraising event, and you want to insert your mission into it. Well, think about how many events there are during the holidays that you could begin doing that. Think about how many events you are doing that could be converted. How
could you easily convert, say, one of the many community group presentations that you are invited to do?

Like if you are, over the holidays…Let’s just say that corporate employee groups who call in wanting to take on a project for you over the holidays. They want to take a holiday dinner to a shut-in elderly person or have a class of school kids that want to serve dinner at your homeless shelter. How could you insert your mission into that and capture the names of these people so that later, after the holidays, this is a group that isn’t just a one time holiday season employee group that comes out or school kid group, but they are an organization that gets involved with you throughout the year like that? How could you do that?

What if your organization does not have any direct service opportunities, even, for volunteers? How could you create volunteer opportunities that are going to be attractive to groups at this time of year?

So I am not just talking about human service organizations that serve kids or families in need. I mean what about arts groups, environmental groups, advocacy groups, membership organizations?

You need to have some projects the community can take on when they call you at this time of year, like cleaning up a roadway, a park, a trail, helping with a year end letter writing campaign to legislators, helping to paint or clean up an office.

What are some of the self contained volunteer projects that you can offer at this time of year? You need to be ready with that. You have got to have your list ready. Even this fall, right now, you need to have that list all cleaned up of kind of a wish list of projects that if people wanted to help you out, they could do.

But the goal is to convert these project center opportunities into events or attach them onto a point of entry. So you have got to be sure, you have just got to be sure that you are thinking long term with your donors. That is my real point here.

So a point of entry conversion event, if you think about all the kinds of events you have got planned over the holidays, how are you going to insert your mission?
So if it is a holiday pageant…Well, let’s take a fundraising event. What would be a good example of a fundraising event? Maybe some of you will have a question of this, like, “Boy. I have got a fundraising event coming up over the holidays.” Like, let’s say you have got an auction coming up over the holidays or you have got a gala. Are you being certain that you are inserting your mission into your gala? Do you have a time during the gala when someone talks about the actual work that you do there? Do you have maybe awards presentations that you could do where you are awarding, say, some of your key volunteers, or your students, or your teachers, or some of your board members? And I don’t just mean giving them an award and saying thank you. I mean presenting the award in a way that conveys to people what your work is all about so that guests who attend these events are really learning about your organization. They are not just coming to a party. The next day they have got to be able to remember, “What was the name of that organization whose auction or event I just went to last night, and what do they really do there anyway?” And what people will remember best are stories.

So what I recommend you do, if you have events already planned that you know you are going to have over the holidays, I recommend that you plan in advance, how are you going to take 10 minutes out of that program?

Like, let’s just say it is a banquet. Say you are doing a banquet, a holiday banquet. Many people will say, “Well our guests don’t want to be interrupted for us to talk with them. They are just there to socialize and have fun.” Well I say you are not in the party planning business! If you are going to be putting on a nice party for them, you have the right to take at least 10 minutes of that program to talk about yourself. And you should do it near enough to the beginning that people are willing to pay attention that you don’t have to talk over them.

And during that 10 minutes, I recommend that you have your visionary leader, who would be your CEO or Executive Director, come up and talk for a few minutes about why they are really involved. Share from the heart the kinds of needs that you are seeing right now in this economy. What are you seeing right now, and especially at this time of year? Needs of the people that you serve and needs of your own staff. What are you seeing right now?
And then also have a story. Have someone come up and give a live testimonial about how your organization has changed their life. That whole thing could just be done in 10 minutes. And that way, at the end, you can have the board member come up and say, “We know many of you came tonight just to have a lovely holiday evening with us and we are delighted that you came. But if you find that you are more interested now in learning about our organization, we have these wonderful little tours that we do once a month, and we will be doing them again starting at the first of the year. We would love to have you come to them. So if you are interested in attending a point of entry starting after the first of the year, please let us know. Either give a little business card right now to the host who is hosting your table.” Or perhaps you have a little card under their plate for them to fill out. But you want to get people’s permission to follow up with them so that they could be more involved with you.

One of the key things I remember from the work that I have done in nonprofit is, again, this time of year when so many people are always calling us wanting to volunteer. Even for Thanksgiving, we had so many people that used to want to come and help and serve meals or take holiday baskets out to families in need.

And I have done that with my own family. I have done that kind of volunteering over the holidays. And I am always noticing, “Is the organization thinking of me as a one time volunteer or are they thinking about a way to build a relationship with me?”

And the more that they talk to me first, like if they come out to my company and they say, “We are so grateful that this whole department is going to be delivering turkeys at Christmastime to people. But before we do that, we want to be sure that you really understand what we do in our organization and that our needs are year round.”

So you do a little what we call a point of entry in a box where you take the point of entry to them in their office, in their lunchroom. Obviously, if they are willing…

We even have some groups that we work with that they will not allow a volunteer group to do special projects for them unless they have had this point of entry in a box. They are just too busy. They say, “One time stands are not sufficient for us anymore. We are looking for volunteer groups in the
community that will help us year round, because our clients’ needs happen year round. It is not just this month of the year or that month of the year.”

So if you do that little point of entry, you can take the same emotional components on the road. You could have your visionary leader go. Say it is a corporate lunchroom where people bring a little brown bag lunch in and you get to go and present to all the people who will be delivering the holiday turkeys or the holiday baskets.

But you are talking about your mission. You may bring a staff member who reads a story, reads a thank you letter from a grateful family that you served, or perhaps even a life testimonial from someone. If it is an environmental group, perhaps it is someone who has been impacted by your work or helped to do trail renewal and other environmental projects. If it is an international relief group you may bring someone who has done ministry work overseas. They come and speak right there and talk about the changes that they have seen thanks to this organization.

So bring the stories right to people because you will resonate. That will resonate with one or two of those, or maybe all, of the people in that room. If it is a church group…Tell them the stories before you let them come and volunteer for you. Make sure that they know what your organization really stands for so that it is not just a one time feel good thing for them. It is actually something long term.

A couple more things and then I will open up for some questions. You have got to get yourself ready for the holiday season, sort of a little sprucing up, shall we say. And I would say the way to do that is get your wish list ready.

I don’t know how many of you have a wish list, but I think every organization should have one and it needs a tune up, because hopefully, some of the things you have been wishing for are given to you and you can cross them off the list and clean up your list and make a new one.

But that requires some focus. What are you looking to get in the course of this year? Don’t put any money items on your wish list, but put a few items that you would really like, whether it is a new computer system, maybe you want a new phone system. We have one group that put in that they were looking for a new air conditioning system. It was in a hot climate. And sure enough, that sheet of paper…Volunteer opportunities. We are looking for
volunteers who will go out and be volunteer drivers or people who will pack backpacks filled with food at the food bank every Friday.

Really put down the things that you need. You can divide it by your departmental areas or you can divide it by the clients that you serve. But I would say maybe put maybe 10 items on that list. And make the wish list attractive. You can make it a little holiday-ish and festive. And have copies of those sitting in your waiting room. You can make sure that you send those out in your newsletter as a piece of your newsletter and then certainly at your points of entry. Starting right now, be sure the people know what you need, because even the person who is delivering the holiday basket or the turkeys, they are serving up turkeys, say, at Thanksgiving, when they see one of those wish lists, they may resonate with something else on there that they could help you with.

And the last thing I would say is that after the holidays, it is not too soon to be thinking about this, or after each group does their holiday volunteering projects for you, for example, when you make that thank you to them, be sure to leave the door open for what else they could be doing.

I mean start thinking right from now about how you would be engaging them in the longer term so that you can say, “It was so great that your work team came out to do that holiday project for our client, but we really would love to talk with you more about what our needs are throughout the year. Could we schedule a little point of entry?” You wouldn’t call it that. Maybe you would call it something warmer and more inviting like a “in the blink of an eye” tour, for example. We have vision groups that call them that.

But reschedule a little tour like that for your folks in January. Kind of keep the door open. And likewise, I would say that at every open house, every holiday event, whether it is one on one with your board members out visiting with their own friends in their neighborhood, whether it is at their company holiday party, whether it is an open house at your place for your volunteers or your staff, the number one thing that you should be aiming for as you are standing around the punch bowl socializing with people should not be, “How can you give me money right now or how can I ask for money, or would you give me some money right now?” But it should be inquiring about that person. “How has your year been going? What kinds of things are you involved in this year?” It is such a rich opportunity when you are
standing there one on one with people to learn a little bit more about their life, to engage them.

And then if they are not a person who is an ongoing donor with you, to say to them, “I really enjoyed talking with you here. I would love to get connected back up with you after the holidays. Can I talk with you in the new year? Can I give you a call in the new year when we have these wonderful little tours?” Or, “I would like to come out to your place and meet with some of your folks.”

The point is use the holiday season as a time for planting seeds. Use the holiday season to customize your fundraising to the person that you are speaking with. If it is someone who doesn’t know your organization, your first contact with them you can’t go asking them for money. You want to use the holiday season to engage them in your work. Tell them about your work. Use it like a little one on one point of entry.

If it is someone that has already been exposed to your work but they are not really going to be ready to give, then use your holiday contacts as a cultivation contact with them as a way to deepen your relationship and get to know them better, and likewise, to have them get to know you better.

But if it is someone who is ready to give, then you can certainly use the holiday time to ask them for money, and you can do that by whatever methods you do, whether it is in a mailing, whether it is a one on one face to face solicitation, or whether it is as a fundraising event, so long as the donors know in advance that they are going to be asked for money.

And lastly, the final way would be if it is someone who has already given to you this year, and we have many very generous donors who have made their gifts already in the year and they are not going to be making another gift at the holiday time. But if you see them at one of those wonderful recognition events or just out at a social event, use it as an opportunity to say thank you. Be sure that you tell them what their money has allowed you to do.

Give specific examples. I always say, don’t ever say thank you without the second part of the sentence being, “…and let me share with you some of the wonderful things that your gift has allowed us to do, how many more people we’re able to serve.” Give a specific example: “Here is an example of the
kind of family that’s been able to benefit thanks to that program we’re now able to offer, thanks to generous donors like you.” OK?

So I think that gives you a little overview, kind of a framework. I know that I have not gotten super-specific and I would like to do that now in the question and answer period. Then at the very end, I will have a few more comments to make about the holiday time. So maybe we can go ahead now and take some questions. Would that be possible, to open up for questions?

Rebecca: Let’s kick us off. We have a question that Sheila sent in, and Sheila said, “Our upcoming event is a dinner that the public pays for, they are $100 tickets, which is prepared by our teenage students in our culinary apprenticeship program. Some of the attendees are our friends and sponsors; some are just foodies who don’t know us at all. Is this considered a point of entry event? How should we use this event as an invite to get a tour of our facilities?”

Terry: Ah, I love this question. Sheila, what a great program! OK, here’s what you should do. Because the people are paying money to come to the event…This is for all of you. Any event that people are paying you money to come to, or that you’re expecting them to give you money when they get there, would be called the old-style fundraising event. That’s what this is. Any fundraising event needs to be converted into what we call a point of entry conversion event. It’s not the same thing as a true point of entry, where you don’t ask for any money, but this is where you insert your mission.

So Sheila, what I suggest you do, and maybe you’re already doing this, if there is a part of the evening when people are seated, if it’s actually a dinner where people are seated, as opposed to what I call a mill-around event where they walk around little food stations and get their food…If it’s a sit down kind of a thing, at some point in the time they are seated, you need to have your amazing students get up and talk. Do this 10 minute thing that I mentioned earlier about the program. Have a board member welcome people. Have your CEO just talk about how long they have been there and what an amazing program it is.

And then, give an example. Have one or two of your students talking about how this program has given them a whole new future with a very specific story of their life. “Here is what I had been doing before. Here is what this
program taught me to do. And here is what my future looks like right now. Thank you so much for being here.”

If you do not have a sit down event, if the event is a mill-around event, normally it is very tricky to convert a mill-around event to insert your mission into it because you don’t have everybody focusing; they are all socializing and not paying attention, necessarily, to the speaker.

But in your kind of an event, Sheila, if it is a mill-around event, if it is like food stations, I am kind of picturing. I have seem some of those kinds of events. You could even have one of the students who has come through the culinary program, each one of them, whether they are wearing a chef’s hat or a special badge, in some way identify themselves with something that says, “I would love to tell you my story.” And just have them milling about so that people will engage them. And have them rehearsed and prepared to tell their story about how your organization has changed their life.

Again, you want each person…The objective of a point of entry conversion event is that every single guest at that event comes away being able to do two things. Number one, remember the name of your organization. And number two, remember what you do. And the only way they are going to really remember what you do is with a story.

So the goal should be that each of your teenage chefs has a certain number of contacts with each person there if you are doing the mill-around method. The point is each guest has got to have a direct experience of the impact of your work.

As individuals, we are emotional donors who are looking for rational reasons to justify our emotional decisions to give. And if you want those donors who paid you $100 for the one night stand to come back next year and ultimately come to points of entry and bring in more people, you will want to have some kind of a little response card that they can fill out. Or, if they are seated at tables, definitely in the program you want to say, “Please let your table host know. If you have enjoyed tonight, we would love to have you come and see our work first hand. Once a month we have these wonderful little tours up at our wonderful center. We would love to have you there.” And if not, if it is a mill-around, you can have cards just available for people to pick up that have those dates on them.
So the main objective, though, is that this is not a one night stand. You do not want to put all that work into putting on that event for $100 a ticket…I mean that is a lot of work to put on a food event. I know how much work those can be. You want this to be the beginning of a relationship, not the end of it. OK, Sheila? I hope that was helpful. Thank you.

Rebecca: Great. Our next question comes from Valerie, and Valerie says, “We actually don’t do any events at this time, as we are an online nonprofit that reaches a national audience. Do you have any recommendations for us? We are thinking of maybe doing a Webinar style series of events.”

Terry: Well, you know, I don’t know what kind of organization you are with, Valerie, like what the mission is, if it is environmental, or a policy group, or whatever. But I would certainly not encourage you to start any events if you are not doing any. I think events are not the wave of the future. They are extremely labor intensive and they go against the whole notion of one on one personal relationships, which is what people want.

And if you are lucky enough and smart enough to be online, and hopefully you are online with Network for Good and you are collecting lots of donations through Network for Good, I would say use that online relationship to get one on one, to get personal with people.

Again, without knowing the details of the your type of organization and the scale of it, if it is a smaller organization I would say have somebody available to quickly transfer those online relationships into live ones if possible. I mean maybe you call people up and find out a little more about what their particular interest is in you. But work on that one on one.

I don’t recommend a lot of online kind of “cute” giving events, occasions like that. I think our model is so much about personal connection to the mission. But you have got to find a way to connect those people.

And maybe on your website you tell the stories. You may already have that. A lot of really great stuff is being done now on the web with stories being told and video on the web that can connect people.

But the goal would be to get them live enough with you that they want to come and hear more or talk to a real person about what you do. That is the
best I can do, Valerie, without knowing in more detail about your organization. I apologize if I didn’t quite go deep enough there. OK.

**Rebecca:** Our next question is a timely one I am sure is of interest to a lot of the folks on the phone. Kirk would like to know, “How do you recommend using the tools of social media to reinforce the Benevon model?”

Terry: I just had a meeting about that this morning, Kirk. Stay tuned and watch our website, and I am on Twitter, I am on Facebook, and I would love, love, love to have you all follow us. We will be talking a lot more about this. Every time I find good stuff that is already out there I retweet it. I am writing my own stuff and we have a lot of information coming out, so keep following us. And you can follow Benevon or you can follow Terry Axelrod, either way.

But I certainly think once people know about your organization, as soon as they do know about your organization, again, through whatever method of social media you are using, you want to use the media to, number one, tell them about your events.

I mean on all of our Twitter accounts we are always telling people…In fact, I did a tweet yesterday or the day before about this call just saying how excited I was and I would be having a call with Network for Good folks about holiday giving.

So you want to be Tweeting and using all the social media access you have to talk about the good work that you are doing. I also recommend you share stories. To me, the stories are the most powerful. I mean whether it is Youtube, whether it is through video, or Facebook, or Twitter, the more you can be sharing stories about the impact of your work…Asking for money online without giving people the emotional connection is not going to do the trick.

I can’t be more specific unless I knew a little bit more about your organization. I would be happy to give you more examples if I know.

And for that matter, any of the rest of you who are still typing in questions for Rebecca to read, if you could just say a little more about the type of work that you at your organization, I will try to be more specific in my answers.
But Kirk, follow us. Please follow us. Follow Benevon or Terry Axelrod on Twitter. And we would be following you. We really are expanding our work there. And stay tuned. We are going to be writing more on this also.

Rebecca: So excellent. All right. Our next question comes from Sunaina, and Sunaina says, “Hi Terry! You mentioned several times that we should encourage the founder or CEO to be the person who emotionally engages the audience before the ‘story’ about how the organization has changed someone’s life. My organization is based in the U.S., but it does its work in Africa and the volunteers on the U.S. side are very widely geographically dispersed so that it might not be practical to have the founder live.”

So Sunaina has two questions. The first is, “Is there a reason why you emphasize that it should be the founder or CEO who speaks, or can it be a volunteer that has directly participated in the organization’s work?” And then the follow-up question after the CEO founder question is, “Also, what do you think about video testimonials? Do you think those are significantly less engaging and that we should push for live volunteers and clients, or would videos be almost as effective?”

Terry: Okay. Very good Sunaina. I got the questions and thank you for the detail. I know it may seem like a long question, but it helps me a lot.

So founder in your case…I mean usually when we are working with an international group and their donors are all over the U.S., but let’s just say all the work is in Africa, there usually are enough people in the U.S. who visited live the programs in Africa. Those are the people who should be doing the visionary leader talk, and they should be doing the testimonial. You should not use video. We say no video at a point of entry.

You can have a photograph, you can read a letter, you can have an audio tape, but we want the point of entry…Like your points of entry, Sunaina, might be in people’s homes around the U.S. Have them hosted by people who have gone to make the mission trips or the trips over to Africa, who have witnessed first-hand your work. A video puts people in a different kind of a mode. We want this to feel intimate and we want them to share stories, particularly about what they most were impacted by.

I was at a meeting last night and listening to some people who had been doing some international work and some of the stories they told were little
things; they were not the big life-changing things, but they were so human, little stories of what they witnessed over there and the impact of the work of this organization.

So, I would not recommend video; keep it live. And you are right; it does not need to be the founder or executive director if they are not located in that city.

Now having said that, a lot of you may have organizations where your CEO or executive director travels around. I mean think about like a president of a university on a large scale. I mean they travel around the country once or twice a year and they visit their alumni in key communities. So I don’t want to let off the hook the CEO or executive director, because there is no substitute for them making some of those appearances themselves and really sharing from the heart why they do the work they do.

Before I take another question Rebecca, let me just mention some of the other resources available through Benevon, I think I would be remiss if I didn’t do that. And then we’ll end with a couple other questions.

So, Benevon, as I mentioned, has been around for thirteen years. We’ve worked with over 3,000 non-profit organizations to help them customize this model to their unique needs.

And we offer classes, we offer workshops and coaching programs that last for either one year, or many groups are with us in a five year program, to ultimately build sustainable funding. And I know some of you on the call are smaller groups, some of you are just getting started, so if you are interested in any of our programs, please go to our website Benevon.com. You can email us at info@benevon.com and tell us that you would like some kind of follow-up after today. If you are interested in any of our classes, they are all listed out on there.

This year we launched a Webinar series, and given the economy, eight one hour Webinar, which you have to buy them all as a package, and they are sold in conjunction with our nine books and tapes for groups that want to self-implement the model and kind of get started on their own, is a lower price point. Those are $799 and that’s for eight one hour Webinar which get into much more detail about the things we are talking about today with points of entry and such.
There is not a lot of detail in there about holidays in particular. But the books...And again I will just make a little plug here for this one book in particular which is the latest book. It was called “Missionizing Your Special Events” and you can order that off our website. Again, that’s Benevon.com, and the book is, I’m just looking here, it’s $49.95, and you can order it online.

Lastly, again, please, please, please, do follow us on Twitter or Facebook and tell us more about yourself so we can be following you and learning more about your great work.

Okay, so that’s all I really wanted to say. I think we can go back and take a couple more questions Rebecca.

Rebecca: Great, thanks for sharing the additional resources with everybody. Let’s see. We had a question here from Michael who is at a little bit of a different point with the audience that is coming up for his event, and I like his question. He’s writing in from a public broadcasting station. And Michael says, “How do we take advantage of this model with cultivating current members at our annual fall preview/thank you for giving event that’s coming up next month?”

Terry: Very good. I’m assuming, Michael, that that is not an “ask” event. It is a cultivation event. And the purpose of a cultivation event...And we’ve worked with a number of public broadcasting stations so I’m quite familiar with the loyalty of your donors and subscribers and the, frankly, missed opportunity sometimes to go deeper with them, because they have been kind of accustomed to giving, but they give kind of in smaller amounts.

So if you are bringing them all together, my gosh, what a wonderful opportunity to say thank you and to share. I would recommend you have some testimonials that night from people who are subscribers and donors and about the impact of your work on their lives.

A lot of people don’t realize the emotional impact and the fervor and the support that people have for public broadcasting. I mean you have major groupies – people who love your work. But you want them to not just say, “I love this work.” You want to get a couple of them to talk about how it
changes their life; why they listen, which programs in particular, why they listen or watch your work.

And then follow up. The goal is you don’t want to ask for money if it’s a cultivation event. You just want to thank people. But you want to say, “Right after the New Year we are having this or that event or we are starting something new where we can come to your office and put on a little program for people, or you can come to us and we are doing backstage tours.” or whatever it is you are offering.

Again, planting seeds for the future. If you’ve got that kind of loyalty of support of people who are coming to an event, a nice big cultivation event, or whatever size event it is, you are building that relationship. Those are the cultivation contacts. It’s wonderful that you are doing that and that you are not asking them for money. Just be sure to plant the seeds so that right after the first of the year you have their permission to call them. That’s the whole idea here, is to have enough of a relationship built over the holidays that afterwards its not awkward for you to pick up the phone and call them and say, “I’d love to invite you this or that just by way of follow up to that great conversation we had at the cultivation event, at the event for the public broadcasting station.” OK?

Rebecca: So this question comes from Audra. Audra says, “We are a transitional housing program for homeless families and single adults. What kind of a tour would you recommend as a point of entry event for an organization like ours?”

Terry: Ah! Audra, I use the example of transitional housing every single time I talk publicly about how to do a point of entry. And I never have had really anybody from a transitional housing program ask me that question. I’m so excited to tell you my answer, which is, take them to an empty unit, if you have one in your transitional housing, because you don’t want to violate any confidentiality, and tell them a story about a family that had lived in that unit. And tell them where the family was before they arrived. Tell them what you did to change their life. And then tell them what you sent them off to and what kind of great shape they were in. Talk about the emotional connection that your staff felt to them, that they felt to you, how proud you are of the new life that they have made for themselves and how sorry you are that you have to say “no” to a certain amount of families. For every one
family you can say “yes” to, you might have to say “no” to three or four or five.

And talk a little bit about the average age for a homeless person, which for many people is really educational because that age is so young, and that’s because there are so many homeless children. You’ve got a great place to do that, Audra. You don’t need to show them the people. Just tell the story.

**Rebecca:** Great. This last question comes from Selina. Selina says, “We are a mid-size nonprofit that does not have the opportunity to engage donors because we actually work in East Africa supporting orphans on the ground. So how would we use the Benevon model in terms of doing a tour when we don’t necessarily have a large center or engaging events in the U.S. that we can invite potential donors to?”

And I think this question is pretty scalable to other folks on the phone who, similar to the internet question we had before, maybe they don’t have events or maybe they don’t have a central hub. You mentioned in your presentation that some organizations don’t even have a formal office. What do you recommend for non-profits like that?

**Terry:** Yes. In the “Missionizing Your Special Events” book there is a whole chapter on what we call “point-of-entry-in-a-box.” This is how you take a point of entry on the road, Selina.

So I would say find your supporters who would host them in their homes, host points of entry in their homes, in churches, in their office conference rooms or lunch rooms. You can take the point of entry…It shows you in the book just how to customize it so you can give it that same emotional impact and the facts without video, and taking it right on the road so that you can still do the follow up right afterwards. You do not have to have any live site to show people at all.

Having said that, you may be able to do some of it in an office if you have an office. There is a section in the book about if you have boring office syndrome, what do you do? If you do have an office but you don’t think there is much to show there, it talks about how to do kind of a virtual tour right in your one room office and bring it to life for people. OK?
**Rebecca:** Excellent. Well thank you Terry, and thank you to everybody who joined us today. Terry, if you just have any other final sign off words, and then I will take it back and thank everybody for being here one last time.

**Terry:** I would just end by saying that the holidays are really open season for people to give, people to naturally connect, people to genuinely be kind, generous, and caring, and it is the natural time for people to want to give. And if you really connect people truly to your mission, you will have made not just a one time transactional holiday donor in the year 2009, but a lifelong donor, which is what we are all after.

Thanks again, Rebecca, for the opportunity, and thanks to Network for Good.

**Rebecca:** Wonderful. Thanks again for joining us. And thank you again to everybody who called in today. So with that, I would just love to wish everybody a great afternoon or great morning, depending on where you are. Have a good one! Bye everybody.