

# **TONY L JONES**

**FUNDRAISING GUIDE** 

# Contents

PURPOSE	3
ABOUT Tony L Jones	4
COLD CALLING RULES AND REGULATIONS	5
Penalties for Violations	6
Preventing Violations	6
FUNDRAISNG TIPS AND STRATEGIES	7
CALL SCRIPTS	8
CALL SCRIPT: CORRECT PARTY	8
CALL SCRIPT: INCORRECT PARTY	9
OVERCOMING PHONE OBJECTIONS	10
EMAIL/LETTER TEMPLATES	11
Email/Letter template 1st Attempt: Donation request to friends and family	11
Email/Letter template 2nd Attempt: Donation request to friends and family	12
Email/Letter Template: Request Letter from Nonprofits	13
Email/Letter Template: Request Letter businesses	14
Email/Letter Template: Press and Media Organizations Outreach	15
Letter/Email Template: Giving Tuesday	16
SOCIAL MEDIA TEMPLATES	17
Twitter templates	17
Twitter example 1	17
Twitter example 2	17
Instagram post example	17
THANK YOU LETTER	18
Individual donation template	18
Business donation template	18
Fundraiser event attendance	19
GOFUND ME INFORMATION Error! Bookma	ark not defined.
EDECITENTLY VENED OTTECTIONS	20

# **PURPOSE**

The objective of this guide to provide guidance to Tony L Jones members to help solicit funding from individuals, business and charity. The guide includes scripts, templates, banking information and frequently asked questions.

# ABOUT Tony L Jones

**OUR VISION** 

**OUR MISSION** 

**OUR AUDIENCE** 

OUR TEAM

Tony Jones-Founder

#### COLD CALLING RULES AND REGULATIONS

Although we are not essentially telemarketers, it is very mindful that we are aware of federal rules and regulations such as the Telephone Consumer Protection Act of 1991.

#### Basic Rules and Regulations

The Federal Communications Commission (FCC) issued a cold-calling rule. The rule establishes procedures to eliminate unwanted telephone solicitations to residences and regulates the use of automatic telephone dialing systems, prerecorded or artificial voice messages, and telephone facsimile machines. In particular, any firm that solicits customers or sales by means of cold calls must abide by the following:

**Time-of-day restrictions** No cold calls may be made before 8 a.m. or after 9 p.m. at the called party's location.

**Do-not-call lists** Must establish and maintain a do-not-call list. If called parties request that no further cold calls be made to them, their names must be added to the do-not-call list. Cold Callers Must Check the "National Do Not Call Registry" — With very few exceptions, federal law requires all telemarketers, including securities firms, to search the National Do Not Call Registry every 31 days to avoid calling any numbers that are on the Registry.

**Identification requirements** – Persons making cold calls must provide the called party with the name of the caller, the person or organization on whose behalf the call is being made, and a telephone number and address at which the caller may be contacted.

**Established procedures** Firms must have a written policy concerning cold calling and the donot-call lists.

**Training requirements** All personnel must be trained concerning cold-calling rules and the existence and use of do-not-call lists.

The FCC rule excludes calls made to parties with whom the caller has an established business relationship and calls for which the calling party has received prior express invitation or permission.

#### Penalties for Violations

Given the overlapping nature of the regulations, there are four different actions that can be taken against brokers or brokerage firms which violate the cold calling rules. First, the FCC can institute proceedings in federal court, or administratively, for violating its rule, with potential fines of up to \$500 per day for each offense. [1].

The Attorney General of any state where a violation occurs is also authorized to bring an action for a permanent injunction in federal district court, if the Attorney General believes that the firm is engaged in a pattern of conduct which violates the FCC rules, and in addition to the injunction, can obtain actual damages, or a fine of \$500 for each violation, with the potential for fines of \$1,500 per violation, if intentional. [2]. The statute also authorizes individuals who have received more than one call per year from a telemarketer violating the rule can also initiate a state court action, for actual losses, an injunction, and a \$500 fine per violation. [3].

Despite the possibility of actions by the FCC and an AG, of more immediate concern to securities professionals is the possibility of administrative actions by the NYSE or the NASD for violations of their respective cold calling rules, with the typical available remedies of fine, suspension, or bar. [4].

#### Preventing Violations

Firms, and individual brokers can avoid possible violations of the cold calling rules, by ensuring that all employees who make cold calls are familiar with the provisions of the rule, including the time restrictions. With many cold callers working late at night, a violation of the 9PM restriction, particularly for callers on the West Coast, can easily occur if the firm is not careful. Further, firms should be sure that a do not call list is in place, and that the firm has procedures, either computerized or manually, for callers themselves to update the firm's do not call list, and that the updated list is available to all potential callers and brokers.

Procedures, and monitoring of those procedures are an important part of a firms compliance responsibility. However, since the FCC cold calling rule provides for a defense, in a private action, that the broker "established and implemented with due care, reasonable procedures" to prevent violations, those procedures may provide the defense needed should the firm find itself being sued by a potential customer, and may provide a basis for a defense in an SRO proceeding as well.

#### Excerpted from:

https://www.sec.gov/reportspubs/investor-publications/investorpubscoldcallhtm.html

https://www.seclaw.com/coldcall/

#### **FUNDRAISNG TIPS AND STRATEGIES**

- Repeatedly say the donor's name and Business name. This should be used at least three times during the communication. People love to hear their name.
- Effectively use "YOU" and "YOUR". This conversation is about what the donor can accomplish, not Tony L Jones. The donor wants to know "What's in It for Me"? In the communication please let them know how they can benefit from a partnership or donation to our organization. It's highly recommended that you do your research on the perspective donor or organization prior to reaching out. Great sources for information include the company website and LinkedIn profiles.
- Build rapport and be personal and genuinely human. Don't read the script verbatim, allow the script to serve as a check off list. It's highly encouraged to speak in a manner that's comfortable for you and match the tone/style of the person you're communicating with. Be conversational and informal. Imagine you're talking with a friend that you have truly known for a while and you should have completed enough research on the donor prior to reaching out.
- Proactively offer the perspective donor benefits they care about. It's not about us it
  about the donor, don't make an outreach seems like a sales pitch. Remember "What's n
  it for me".
- Render a big smile as you speak or write a way that the customer can hear your smile and passion for Tony L Jones in your speak or email. If you're on the phone consider standing up and walking around to convey energy. If you're emailing use friendly word choices, don't use emojis that is truly a turn off to many.
- Call ahead to get correct information. Most people who are soliciting contact information for desired organizations a day before and ask questions such as "Who handles funding or gifting at your organization?" and they use that information to conduct research for emails. We must be friendly with the operator or receptionist; they are the gatekeepers. Also, if you sending a email to <a href="mailto:customerservice@thecompany.com">customerservice@thecompany.com</a> it most likely goes to customer service team. The representative will most likely send you a generic email back a=and it will never make it to correct person that why its important to seek the person contact information who possess the power.

#### **CALL SCRIPTS**

#### CALL SCRIPT: CORRECT PARTY

1. "Hello, {Contact Name}. I am {Callers Name} manager with Tony L. Jones. How are you, this {morning or evening} (Contact Name)?"

Please pause and wait for a response, even a negative one. In either case, respond accordingly with a smile, remember that Tony L Jones brand and reputation is on the line.

2. "Good. I'm delighted to hear that (Contact Name)! Is it a good time to speak with you today?"

If yes, continue the script.

If no or unavailable, then ask "When is a good time that I may be to speak with you regarding a potential funding opportunity?

If they say they are busy, rebuttal by saying:

"If email correspondence may be easier, I will be more than happy to communicate that way! Do you mind providing me with your email address?

- 3. "I'm the fundraising manager with Tony L Jones. We are a non-profit with a mission to upskill Black Americans and allies committed to the pursuit of learning-by-doing into Learning Experience design and technical roles through our immersive design bootcamp. We also provide various creative services to organizations seeking consultation, products, and learning experiences designed from an anti-racist perspective. We are a strong advocate for equity, diversity, inclusion, and anti-racism. In doing some research (present why they would benefit) We are raising funding to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come. Would you be interested in donating to our organization?"
- 4. If the person says yes, continue to providing donating payment options refer to page 20.
- 5. If the person says no, continue with the below script and rebuttal "Your gift would allow Tony L Jones to provide both learning experiences to the public and growth opportunities for Black designers in a big way. It is especially important this year."
- 6. "Thank you kindly for your donation, today. It means a lot to many people. Tony L Jones will benefit from your kindness and generosity."

#### CALL SCRIPT: INCORRECT PARTY

1. "Hello, {Contact Name}. I am {Callers Name}, (Manager) from TONY L JONES. How are you, this {morning or evening}?"

Please pause and wait for a response, even a negative one. In either case, respond accordingly with a smile, remember that Tony L Jones brand and reputation is on the line.

2. "Good. I'm delighted to hear that (Contact Name)! I'm calling to speak with someone who will be able to assist me with fundraising or gifting efforts! Would you please be so kind (Contact Name) to put me in contact?

If yes, continue the script.

If no or unavailable, then ask "When is a good time that I may be to speak with them regarding a potential funding opportunity? Do you mind providing me with their contact information?

- 3. "I'm the fundraising manager with Tony L Jones. We are a non-profit with a mission to upskill Black Americans and allies committed to the pursuit of learning-by-doing into Learning Experience design and technical roles through our immersive design bootcamp. We also provide various creative services to organizations seeking consultation, products, and learning experiences designed from an anti-racist perspective. We are a strong advocate for equity, diversity, inclusion, and anti-racism. In doing some research (present why they would benefit) We are raising funding to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come. Would you be interested in donating to our organization?"
- 4. If the person says yes, continue to providing donating payment options. Refer to page 18.
- 5. If the person says no, continue with the below script and rebuttal "Your gift would allow Tony L Jones to provide both learning experiences to the public and growth opportunities for Black designers in a big way. It is especially important this year."
- 6. "Thank you kindly for your donation today (Contact Name). It means a lot to many people. Tony L Jones will benefit from your kindness and generosity.

#### OVERCOMING PHONE OBJECTIONS

- I give elsewhere ("Awesome! That is absolutely wonderful to hear! Then you truly know how much a difference a donation like this can make. Tony L Jones will greatly appreciate any donations even if its \$5")
- I can't afford it ("I understand that things are truly tight these days, I have had to do some adjustment by myself. ... Is there an amount you would be comfortable with?
   Tony L Jones will greatly appreciate any donations even if its \$5. And (Contact Name) most charitable donations are a tax write-off")
- I don't give out my details over the phone ("Absolutely I feel the same way too, you have to be secure these days. No problem (Contact Name) I'll be more than happy to send you all the information via email to you today so you can use that to access our secured GoFundMe page. Would you please be so kind to provide your email address!")
- I don't have a credit/debit card ("No problem (Contact Name)! I'm the same way too! ... You can mail your gift in by check or money order. I'll send you the paperwork via email. Can you provide me with your email address?")
- I'll think about it later on ("Thank you so much (Contact Name). I truly understand some decisions can't be made instantly. Just a reminder that our challenge runs only to the end of this week, so I hope you'll double your gift by making your decision soon.")
- I'll do it online ("Thank you (Contact Name) We do have online options through our GoFundMe site, so you know, the average gift we're receiving is \$XX if that helps you with your thinking. Can you provide me with your email address so I can send you our GoFundMe information so you'll have it at your fingertips when you get ready?")
- I have to discuss it with the spouse/ leadership team ("I understand that, and thank you! It's always great to communicate things. Are there any questions you think your may have that I can help you with now?")

# **EMAIL/LETTER TEMPLATES**

Email/Letter template 1st Attempt: Donation request to friends and family

Subject line: Tony L Jones Funding

Hi [insert name],

I wanted to reach out and let you know that I'm leading a fundraising initiative to support Tony L Jones, new education non-profit for BIPOC. We are raising funding to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come. As you probably already know, this cause is very important to me. [Write 1-2 more sentences about your personal history with this cause, and why it means so much to you.]

We're encouraged by the support we've already received, but still need help reaching our fundraising goal of [insert dollar amount].

Would you be willing to contribute to our fundraiser? A donation of any amount would truly help us reach our goal to fulfill our mission. It will truly mean the world to us and will impact many.

To help us fund support for Tony L Jones simply click the link to my fundraiser below:

https://charity.gofundme.com/o/en/campaign/Tony L Jones

If you could also share my fundraiser link with your friends (Contact Name), it would mean so much. The more people hear about our cause, the quicker we can reach the fundraising goal.

If you have any questions, we would love to talk to you via phone or schedule a Zoom, so please don't hesitate to reach out if needed.

Sincerely,

#### [Your name]

Email/Letter template 2nd Attempt: Donation request to friends and family

Subject line: Only [insert days] to help me reach my fundraising goal

Hi [insert name],

We only have [number] days to finish fundraising initiative for Tony L Jones.

If only [insert number] of people donated [insert dollar amount] to our fundraiser, we would be able to make significant progress toward our fundraising goal. Would you be able to help make this a reality for us?

To donate, just click the link to my fundraiser below:

https://charity.gofundme.com/o/en/campaign/Tony L Jones

It would also really help if you could share our fundraiser link with everyone you know. The more eyes on the fundraiser, the better!

We appreciate all of your support! We wouldn't be able to accomplish [fundraising goal] without your help. If you have any question, we would love to talk to you via phone or schedule a Zoom, so please don't hesitate to reach out if needed.

Sincerely,

#### [Your name]

Email/Letter Template: Request Letter from Nonprofits

Subject line: Tony L Jones Funding

Good morning/afternoon [insert name],

We recently started a launched our fundraising initiative for Tony L Jones. We are a nonprofit organization providing a tuition-free LX Design Apprenticeship for participants to learn the Learning Experience (LX) Design trade by partnering with experienced professionals to work on real projects together. We have gained support from GoFundme.Org as our fiscal sponsor. Our mission is to end systemic racism while giving meaningful experience to those who may not have access to traditional paths of education. We are beyond excited to involve our community in our fundraising efforts.

100% of funds donated to Tony L Jones (less payment processor fees) will go to support the mission. We already have more than 350 volunteers in this program, so funding will go to cover legal, operating costs, skeleton staff to manage volunteers, and technology licensing fees for Mentors and Apprentices. We will be able to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come. To find out more about how we plan to make a difference, click on our fundraising link below:

#### https://charity.gofundme.com/o/en/campaign/Tony L Jones

In order to meet our fundraising objective, it will truly take a village. Are you able to support this incredible cause? Any amount you can contribute will make a difference—even \$10.

Thank you (Contact Name) for reading about our mission, and please reach out if you'd like to learn more get involved with our fundraising efforts. If you have any question, we would love to talk to you via phone or schedule a Zoom, so please don't hesitate to reach out if needed.

Best,

#### [Your name]

Email/Letter Template: Request Letter businesses

Subject line: Tony L Jones Funding

Hi [insert name],

We recently started a fundraiser initiative for Tony L Jones. We truly believe that organizations like yours can really make a difference in our communities, and that's why we're seeking for your support. We are a nonprofit organization providing a tuition-free LX Design Apprenticeship for participants to learn the Learning Experience (LX) Design trade by partnering with experienced professionals to work on real projects together. We have gained support from GoFundme.Org as our fiscal sponsor. Our mission is to end systemic racism while giving meaningful experience to those who may not have access to traditional paths of education. We are beyond excited to involve our community in our fundraising efforts. [Insert 1-2 sentences about your cause and how these ties into the local businesses or why it may interest them.]

So far, we've been able to raise [insert amount] with the help of our community—but we still have some work to do to meet our goal. Please be advised that 100% of funds donated to Tony L Jones (less payment processor fees) will go to support the mission. We already have more than 350 volunteers in this program, so funding will go to cover legal, operating costs, skeleton staff to manage volunteers, and technology licensing fees for Mentors and Apprentices. We will be able to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come

Would you be able to make a contribution to our cause? A donation of any amount will make a difference and would mean so much to us. To learn more about our fundraiser and give a gift of any amount, simply click the link below:

#### https://charity.gofundme.com/o/en/campaign/Tony L Jones

Thank you (Contact Name) for reading about our mission, and please reach out if you'd like to learn more get involved with our fundraising efforts. If you have any question, we would love to talk to you via phone or schedule a Zoom, so please don't hesitate to reach out if needed.

Best,

#### [Your name]

Email/Letter Template: Press and Media Organizations Outreach

\*Please get approval from marketing or admin(Crystal or Christy) before you reach out the any press or media organizations. It will be best for this communication to come from them.

Subject line [short, sweet and simple]:

Hi [insert name],

Our executive leadership team recently saw your story about [social justice/inequality], and wanted to share our own efforts to combat this.

We are a nonprofit organization providing a tuition-free LX Design Apprenticeship for participants to learn the Learning Experience (LX) Design trade by partnering with experienced professionals to work on real projects together. We have gained support from GoFundme.Org as our fiscal sponsor. Our mission is to end systemic racism while giving meaningful experience to those who may not have access to traditional paths of education.

So far, Tony L Jones has raised [insert amount] to help. 100% of funds donated to Tony L Jones (less payment processor fees) will go to support the mission. We already have more than 350 volunteers in this program, so funding will go to cover legal, operating costs, skeleton staff to manage volunteers, and technology licensing fees for Mentors and Apprentices. We kindly ask you review our donation page below:

https://charity.gofundme.com/o/en/campaign

Thank you for reading our story, and I'd welcome an opportunity to share more details with you. If you have any question, we would love to talk to you via phone or schedule a Zoom, so please don't hesitate to reach out if needed.

Best,

#### [Your name]

Letter/Email Template: Giving Tuesday

Subject line: Celebrate Giving Tuesday by donating to our cause

Dear [insert name],

Happy #Giving Tuesday! We are raising money for Tony L Jones, and need your help on this special day to reach our goal.

I'm aiming to raise a total of \$[insert amount] by the end of the day, which will allow us to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come. The clock is ticking to make this goal a reality.

Simply click the link to my fundraiser below to read more about our cause and make a donation. Any amount will be greatly appreciated.

https://charity.gofundme.com/o/en/campaign

If you could also please be so kind to share our fundraiser link with your contacts on social media, it would help boost awareness for our cause.

We truly appreciate all of your support!

Best,

#### [Your name]

Funding Manager Tony L Jones www.Tony L Jones.com

#### **SOCIAL MEDIA TEMPLATES**

## Twitter templates

Twitter example 1

Please support our #GoFundMe by donating and sharing the link https://charity.gofundme.com/o/en/campaign/Tony L Jones. Thank you so much for your unwavering support!

Twitter example 2

We've had our #GFM for [insert how many days] ... thank you so much for your over wavering support! Please RT to help us reach our goal:

https://charity.gofundme.com/o/en/campaign/ [#hashtag]

#### Instagram post example

We are beyond excited to announce that our @GoFundMe fundraiser campaign is live and in action. Please support our GoFundMe by donating (even \$5 helps) and sharing with your friends and family. Link is below!

https://charity.gofundme.com/o/en/campaign [#hashtag]

#### THANK YOU LETTER

Individual donation template

Dear [donor name(s)],

I want to take the time to sincerely thank you for your donation to Tony L Jones. As you know, we started this fundraiser to end systemic racism while giving meaningful experience to those who may not have access to traditional paths of education, The contribution of\$[insert donation amount] on [insert date of donation] helps us get one step closer to our goal.

Thanks again for your generosity and support,

#### (your name)

Funding Manager Tony L Jones www.Tony L Jones.com

Business donation template

Dear [business name/contact name],

We want to extend our sincere and profound gratitude for [company name]'s contribution to our funding. [company name]'s generous gift will have a tremedous impact on helping Tony L Jones provide both learning experiences to the public and growth opportunities for Black designers.

On behalf of Tony L Jones we want to personally thank you for helping us make a positive difference. Your support encourages our continued commitment to reaching our goal.

Thanks again for your generosity and support,

#### [Your name]

#### Fundraiser event attendance

#### Dear [attendee name(s)],

We truly appreciate you making the effort to attend to our fundraising event for TONY L JONES. We had an amazing turnout, and we managed to bring in \$[amount] more in donations! Your attendance and support have played an important role in our fundraiser's success—thank you.

With your contribution, we'll be able to ensure Tony L Jones can thrive as a tuition-free nonprofit serving aspiring designers and communities for years to come. Your generosity and support is an encouraging reminder of why we started this fundraiser to empower others to reach their highest potential.

With gratitude,

#### [Your name]

### FREQUENTLY ASKED QUESTIONS

#### HOW DO YOU DO IT?

Tony L Jones is a nonprofit organization providing a tuition-free LX Design Apprenticeship for participants to learn the LX Design trade by partnering with experienced professionals to work on real projects together.

Tony L Jones employs a "learn-by-doing" educational experience for the Apprentice. The minimum length of time for an Apprenticeship is six months and can go up to two years for participants who want to hone deep subject matter expertise in LX Design. Apprentices and Mentors will work together on various types of instructional design projects, which currently include a variety of eLearning courses for the United Nations. In addition to providing a free learning experience for Apprentices, the Tony L Jones model provides Mentors with opportunities to gain valuable education and leadership experience.

Tony L Jones understands that every individual has a different learning style. Instead of a heavily sequenced classroom-based curriculum, direct instruction is fed to Apprentices in the flow of work via Slack. Tony L Jones has very specific skills and competencies the Apprentice must master to complete their Apprenticeship, but we do not force the order and cadence of skill acquisition. Instead, Apprentices continue to work on a variety of projects until they reach target competency and can prove that competency through extensive documentation and mapping against our competency framework. Tony L Jones revenue, necessary for operating costs, is generated through charitable donations and contracted services, including custom eLearning development, product design, and consulting.

#### HOW WE WILL YOU USE THE MONEY?

100% of funds donated here (less payment processor fees) will go to support the mission. We already have more than 350 volunteers in this program, so funding will go to cover legal, operating costs, skeleton staff to manage volunteers, and technology licensing fees for Mentors and Apprentices. We are grateful for your support!

#### WHO IS YOUR FISCAL SPONSOR/BACKER?

<u>GoFundMe.orq</u> is proud to act as fiscal sponsor for Tony L. Jones, given the important charitable services it is providing to an important charitable class of people. GoFundMe.org is a 501c3 non-profit organization (EIN #81-2279757) and solely responsible for the collection and management of your donations in support of the charitable services described here. All donations may be eligible for tax-exemption, and GoFundMe.org will issue donation receipts on a quarterly basis.

#### WHERE ARE YOU LOCATED? WHO IS YOUR COMMUNTIES?

Though we offer full remote access to our organization to the majority of our participants, it's critical to also establish a physical presence in underserved communities. Our goal is to engage with individuals equitably regardless of access to technology. We aim to become an engine for economic and cultural development in these communities by meeting them where they are.

#### WHAT DO PROGRAM MENTORS GET OUT OF Tony L Jones?

Our mentors gain career enrichment, leadership opportunities, and the experience of designing learning products that are aligned with the values of social justice, antiracism, and diversity and inclusion.

#### WHAT DO PROGRAM PARTICPANTS GET OUT OF Tony L Jones BOOTCAMP?

Our designers have access to mentorship opportunities with experts in the fields of education, design, and tech. All designers may cite their time at Tony L Jones on their LinkedIn profile, which they can leverage for future employment opportunities. The projects they develop become portfolio artifacts, serving as explicit proof of skills and proficiency

