

## Previously Recorded *Engaging Your Board in Creating Sustainable Funding* Webinar

**Bianca Galam:** Hello everyone. We are going to get started now. My name is Bianca Galam and I am from Benevon, joining you from our Seattle office. I want to welcome you all to the Benevon webinar “Engaging Your Board and Creating Sustainable Funding.” The webinar today will be led by Benevon founder and CEO Terry Axelrod. Terry are you there?

**Terry Axelrod:** I am. Hi everyone, great to have you. Thank you, Bianca. This is the second in a three-part series—possibly four parts, we are debating—for self-implementers of the Benevon model. And I am not certain how many of you actually have been using the model on your own. We usually have at least half the people on the webinars are people who are new to the model, so I am going to do a brief overview on the model. But, the focus of this presentation, and this whole hour together, is on how to engage your board in creating Sustainable Funding. Okay? But I want to get everybody on the same level playing field before we dive into the board component of it.

So, I think you all have seen this, if you haven’t, this is the Benevon model for Sustainable Funding. And I want to reference that I will be using our book “The Benevon Model - A Step-by-Step Guide to Getting It Right.” Throughout this webinar, I will allude to certain page numbers. Certainly, if you are planning to try the model on your own, you’ve got to have the book because it is designed to guide smaller organizations through the process on their own, to get them strong enough to be able to come to our full program, where we can customize this and coach you to success.

So, just to say, Benevon is in our 21st year. We have been around quite a while. We have worked with over five thousand non-profit teams, and last year, those teams collectively have raised over one billion dollars using this model. So, we are super proud of this. I will say, it is not a model for fundraising, it is a model for Sustainable Funding and, really, as I have come to see over all the years I have been working on this with our great groups, that it’s a model about deep engagement of the community in your mission.

So, don’t think of this as fundraising; don’t think of this as a new way to put on an event, or get some people to write you checks. Really, think about it as, “How do I find the people for whom my organization’s mission could become one of their top three charitable gifts in their lifetime?” In other words, this is a pipeline filling system for major gifts, which is what our groups need. We don’t tend to work with the big universities that already have a readymade stream of alumni, nor do they have a large major gift staff. The groups we work with, even though many of them are quite large in their budget size, all the way down to about four hundred thousand dollars in budget size, these groups don’t have a systematic process for engaging people. They don’t have a pipeline that they are consciously and very intentionally cultivating towards major gifts, nor do they have a system or a process for doing that.

So, I will be referring to the book quite a bit as we go. Starting off by talking about boards today. I want to talk a little bit about: if you think about boards, most of the groups that we work with, tell us that there is a direct correlation between their success with implementing the Benevon model and the level of engagement of their board members. So, you want to think about, how engaged is my board right now? What percentage of my board members really are engaged in the mission; really believe in the mission, versus they are doing it as a nice thing to put on their resume. or because their boss asked them to be on the board and it’s a big honor?” But, how many of them are really deeply connected to your mission? So that is the first thing, it is a question about

mission connection. And I am just going to write a few things on here, so you can be thinking about this mission connection.

And then, most people do not join the board because they are dying to do fundraising. Have you noticed? They end up coming...they come on a board to be involved in the governance. That is clearly the main role of boards is governing, but it just takes a few meetings before they are suddenly finding themselves filling tables, selling tickets. Before you know it, they are having to do the things that they most dreaded. And oftentimes, it is very soon into the process that they are having to do that. So, they are not too happy about it. And many of us have been on the receiving end of a board member who has tried to ask us, "Oh, won't you to just help me out a little? Write a check, come help me fill a table." I don't know about you all but, when that happens to me, sometimes I can't say no. Just because of my relationship with the person, I have to say, "Yes," and I'll go to that event, or I will write that check. But, as soon as my friend gets off that board, I am no longer going to be a supporter.

So, this is a model for how do we engage people like me, in that example, in the real mission of the organization so that when my friend goes off the board, I am going to continue to give. Most groups have a lot of what I call board envy. They always think that, "If I just have that fundraising board...if I just have that perfect fundraising board, everything would be great." We have found that is not the case. We work with a lot of groups that you would think would be the groups that would have those magical fundraising boards. But really, when you pull back the curtain, what is there is a very systematic plan, a staff that are working very intentionally to engage board members and their community so that the board members really don't feel that they are being pressured to be involved in fundraising.

So, all of this boils down to what I call the 'Benevon golden rule'. The golden rule in the Benevon model is to treat your board members as if they are already, if not going to become, your most cherished major donors. So, treat your board members as if they are going to become your most cherished major donors. Think about how you treat your major donors. Okay? Think about that. Even if they are a little quirky, or they don't call you back right away, or they give you a little less money than you might like them to give, you still respect them; you honor them; you treat them with the certain deference. That is what we are saying needs to happen with board members. Treat your board members in that same way and, you will find over time, that that will happen. So, let's go on, I want to give a quick overview of the Benevon model, and then I am going to come back and talk about a lot of the things that we have learned about how to engage the board in the whole process. So, for those of you who are new to this, even if you are not, I would ask that you pay attention to this part, because there are some new things that I am going to try to stress, the five key metrics that we are now teaching when we teach the model, and these may be new to you.

First of all, the model, as you can see from the shape, is a circle. Four steps to it, the first one being the Point of Entry. This is a tour of the mission, not a tour of your facilities or your programs, where we get the people the facts at the most basic one-on-one level, a deep emotional connection, and we capture their names with their permission—no more leaving your business card in the bowl for a drawing. So, many of you already do tours, or you could do a tour. Those are probably more what I'd call a 'tour of your facilities' or a 'tour of your programs'. A Point of Entry, on the other hand, is a tour of your mission. So, we take all that you do in your mission and divide it into three buckets...three broad bucket areas. So, we don't just cherry pick your very best three programs. If you have sixteen programs, we cluster them into three broad buckets. So, supporting individuals, strengthening families, building community. Like that, broad buckets.

And at the Point of Entry, which has got to be sizzling, you will do these two times a month—minimum. You will be engaging people with stories along the way on the tour. There is a whole design that we have, where the Visionary Leader speaks, then we walk around, we take a tour,

three stops: each one we tell a myth...a myth buster fact, a story, and a need. And we end the tour with one live testimonial. That is a lot I just said. The heartbeat of the whole model is the Point of Entry, right here. As I said, you'll be doing these twice a month. Each one is hosted privately, by invitation only, by someone that we call an 'ambassador'. So, an ambassador is someone who hosts one tour, once in their lifetime; they don't have to do it many times, they just need to do it once, and it needs to have ten or more people attending.

So, the goal is that you have at least two ambassador hosted Points of Entry per month, and that in the Follow-Up Call, after the Point of Entry, which is made by your team leader who is usually a development staff person—this is a half-time job the first year—that team leader makes a Follow-Up Call to every one of those ten or more people who come. And so, in a month, there'd be at least twenty people who would come. And out of that, at least one out of every ten guests agrees, in turn, to become an ambassador. So, that is our ratio, is that you do two of these a month, back over here, and one out of every ten guests agrees to become an ambassador—ten percent.

Now, we have groups that will put on...we have one group that puts on sixteen Points of Entry a month. And they get, probably, three or four new ambassadors out of every ten. So, do the math on that and you can start to see how this scales very quickly. But, at a minimum, we want one ambassador out of every ten, and that is because the Point of Entry is so good. Fifty percent of the people, roughly, that come in the Follow-Up Call, are what we call 'blessed and released'. That means that we truly let them go. That means, in the Follow-Up Call, which has its own questions and a whole format that we teach—this is all written up in the book in detail—you are going to find out, "Are these people even really interested? Is this person really interested in what we are about here? Might they want to get involved in some other way?" Fifty percent of them will. You will have to be trained and train yourself to read between the lines to hear no, when they are trying to tell you no, even though they may be very nice about it. But fifty percent of the people will be blessed and released, and out of the remainder, one out of every ten...well, one out of every ten from the beginning will become an ambassador. So, the Point of Entry... Moving on to step three down here. Before we get to step three, we have got to look at this Cultivation Superhighway.

This is, how does the dating process continue? I think of the Point of Entry, back here, as date number one. A first date. You don't tell everything there. But, after you have done the Follow-Up call and the people say, "Yes, I am interested," maybe they weren't the blessed and released people, they were the people who said, "Yeah, I am interested. I would like to host a tour of my own", or "I am just interested in that one art program you have, I would like to know more". You want to cultivate them, and the more contacts you have with them in here, the more dates you have before you do the asking down here for money, the more money we find you'll get.

So, what does the dating process look like? If I am interested in an arts program, then you want to invite me back and maybe have me come and meet with the art director. Perhaps, if I agree to be an ambassador, it will mean that I will be inviting people myself to a Point of Entry, and that in the Follow-Up with those people, my friends will get more involved and that will get me more involved. But, we find it takes two or three contacts in here, before the ask, before people are really ready to be asked for money. They have been sufficiently cultivated.

So, the ask in our model happens two ways. If you recall from the book, it's either one-on-one, or it's something we call an 'Ask Event'. A free one hour Ask Event. So, many people think of Benevon as this Ask Event, and that is all they think of Benevon as. They don't realize that we would never want people to come to an Ask Event until they have attended a Point of Entry. In fact, minimum, forty percent of the people at this Ask Event, forty percent of the people at the Ask Event must be people who have come to a Point of Entry in the prior twelve months. So, some of you have been using the model on your own for several years. I talked to a woman this morning, she said "We can't get any of those. We are not doing the Points of Entry. We are not really able

to do the Points of Entry anymore. We have, kind of, burned out people. Nobody really wants to bring anyone. So, our staff just put on an Ask Event by ourselves. Over and over, we ask our board members to fill a table. They invite people who use this Ask Event as, really, a first date, and therefore you can't really ask people for a significant gift if they have not been cultivated." So, the Benevon model is different. It is not just a new way to put on a party. The whole idea of the model is that you are only asking people for money once they have been through this whole process. Not as a first date, but as a fifth date; that is when the asking happens...or fourth date, like that.

So, at the Ask Event, as I said, it is free, it is one hour—that would mean sixty minutes—it is either a breakfast or a lunch. And people are invited at the end of the Ask Event to join a Multiple-Year Giving Society. So, this is the pledge card that we used at the first Ask Event, at our school here in Seattle where I started the model. Where it really came together for me, when I was designing it. So, let me make a little sense of this for you. This came at the very end of the one-hour event, so it is a breakfast, you have heard from the Visionary Leader, you have seen the video, you have heard a testimonial, and at the very end of the hour, the person who is going to ask for your money. And they say "You know, today, we...you've heard our stories, you have met our teachers, you have seen the kids. Now we would like to ask you if you would consider becoming a founding member of our sponsor a student society". And the man who made the pitch at our first Ask Event said, "We have over six hundred kids at the school, and we have got a short fall in our operating budget of about six hundred thousand dollars. If you believe in what you have seen today, and you would like to support the ongoing operations of the school, would you consider becoming a founding member of our Giving Society?" And then, one by one, he explained these three giving levels. Sponsor a student for a thousand dollars a year—this is the outcome of it. This was obviously not all on their card. But a hundred and fifteen people... Excuse me. Just a second. Let me clear my throat here. A hundred and fifteen people, out of eight hundred and fifty up here, agreed to check that box, and made a five year a pledge for a thousand dollars a year. Eight people pledged to sponsor ten students at ten thousand a year, and four more at twenty-five a year for five years. Which means, cumulatively, we had raised nearly a million and a half dollars from less than fifteen percent of the people. This is a hundred and twenty-seven people, out of eight hundred and fifty.

So, the point is, these were the people who have been cultivated; these were people who had really been through the whole process, and they were ready to make a significant gift. Notice, we have this box down here. We let people, as they'd like, make a gift of any amount. So, they can give a hundred dollars once; they can give fifty dollars three times; whatever they wanted to give was absolutely fine. And then the last box, we said, "Please contact me, I have got other thoughts to share". So, these are people...maybe they had already checked one of these boxes up here; maybe they just have advice for you or for us, or they wanted to give us real estate or stock. Whatever it was, we were happy to give them a call.

So, going back to the model, you will see that, after the Ask Event, we got back on the phone and started to call all the people who just made those big gifts, and we thanked them for coming, and we said, "Is there any way you can see yourself getting more involved now that you have been to the Ask Event?" And one by one, they start to say "I wish I had brought other people with me. I with that my next-door neighbor, my daughter-in-law, my friend from the health club had been there. That event was wonderful." And that's when we said "Would you consider becoming an ambassador, where you could invite them to a Point of Entry? You could host that Point of Entry. We will do they Follow-Up, and by next year at this time, if the dating process has...if they haven't been blessed and released, you could invite them to sit at your table, and they would be able to give money and join the Giving Society if they would like, next year." So, that is how the model works. If you do it for [INAUDIBLE 00:16:43] this Free Feel-Good over here. These are the events that we put on there, this is nothing new. You don't have to cook up any new events. Definitely, please, do not cook up any new events for Benevon. You want to look at program events you're already doing: a graduation, some kind of a celebration for your program participants. Something

that's mission-focused, though. Not a golf tournament; this is not free tickets to the golf or the gala. This is actually a program related event, where you invite a few donors, perhaps put a little reception before it, and give them some facts and some emotional connection, and then call them and Follow-Up, and see whatever their feedback is after this Free Feel-Good. So, that kind of gives you a quick overview of the model; I have given you this.

Let me talk now about the roles for boards. So, I just want to start with saying, the biggest misconception... I was on a different call this morning with another group, that immediately said, "Our board thinks they know what Benevon is. Some of them have been involved with other groups years ago. Some of them have heard about it. To them, this just sounds like a way to get them to fill a table or write a check. And they don't understand that they really do not have to do any asking for money." So, there is nothing on here, that I am going to tell you about, that has to do with board members asking anybody for money. So, that alone should be a relief to those of you who are board members on the call, and to those who will be trying to explain this to board members. But we do have three roles that all board members can participate in. We do not require anything. If your group chooses to come and work with us, officially—come and work right with Benevon, and have a coach, and come to our trainings, and bring a team and all the pieces that we have—you do not...the board members do not have to do anything. I will tell you though, what we would like them to do: these are three roles that we feel are pretty appropriate and pretty easy for board members. The first one is to invite people to Points of Entry. Now, we do not require that board members invite people to Points of Entry, but if you send a team to Benevon, you bring a team of seven to ten people to one of our workshops, those people who come on the team, they all need to agree to become an ambassador. And those people will come back having designed a brilliant Point of Entry, because that is what we do at the workshops. And then, they will, hopefully, invite the board members to come to a Point of Entry Event. Once you've got it refined a little bit, have them come to a Point of Entry Event, perhaps, appended on to a board meeting. And the board members should be really excited after that. Then they will get a Follow-Up Call, just like anyone else would get that has come to a Point of Entry. And in fact, many of them will say in the Follow-Up Call, "Now that I see what this is, this is fantastic. This is why I got involved with this organization in the first place. I love the mission here. I have got a group from my office. I could easily have ten, fifteen people from my office come, or from my yoga group, my book club, or my faith group; whatever. So, naturally some board members may choose to actually become full-fledged ambassadors, meaning that they would invite ten or more people.

But some of them may say, "I just want to invite a couple of people." So, in addition to the two Points of Entry that you going to have per month, that are only hosted by ambassadors, you might decide that you're going to have one that is more open to the public Point of Entry, you might have one more that's going to be open to the public, and perhaps some people on the board might say "I've just got one or two people, I'd like to invite them to a public one". That is fine. Second thing, role for board members that we think is pretty easy, is to have them thank people after they have given money. So, have you ever received a "thank you" call from a board member after you've made a gift? Many of you may say yes, I suspect a few of you...I hope a few of you would be saying yes, but most people say no. If you have, you remember it. "Wow, a board member took their time to call and thank me? How great is that?" And, when you think of it from the board member's point of view, they were probably given a list of people, and told "Just call. You can even call them on their lunch hour and thank them from the gift." People will remember that. And If you talk to a real person, they're probably going to tell you great things because they have enjoyed being involved with your organization, and certainly involved, if they gave at the Ask Event, they will have lots of good things to share.

We even have one group, they did a board retreat, and they gave each board member, at the break, a name on a three-by-five card and a phone number of a donor, and said, "Please go out on your cell phone and thank this donor over the break." And people came back in gushing. They were so excited. They said, "Oh my gosh, this person really gets it. They really love what we do." And it was really energizing for the board members. I'm not suggesting that you do that, I'm just

saying, this is a very easy role for some board members. You might have one or two that would really like to do that. And the third role for board members is that they give money themselves. We do not want any board members to ask. They can ask if they want, but frankly, we find that, the board members who like to ask may be doing it a little bit prematurely in or model, so we kind of want to hold them back until the donors have gone through the dating process, like I described. But we certainly want to be able to tell the community that a hundred percent of your board members give money. Now, we don't believe that we should have minimums. You may choose to have a minimum. A lot of boards say...it's kind of what we crassly call a give, get, or get off policy. You know, "If you don't give at least this much, you shouldn't be on the board". We believe we want more diversity in boards, including financial. And we want people to feel comfortable with their gift.

Again... going back to the Benevon golden rule, we want to treat them as if they are, or are going to become your most precious major donor. So, you don't want to ask people too soon, nor do you want to be inappropriate and ask people for too much money if they're on the board. Each board member is capable of giving a different amount, so we recommend that this whole giving thing with the board be handled one-on-one. You can let the board members know—and I'll come to this in a minute—at the board retreat, or in a board agreement that they signed that you would be asking them to make a gift of some size so that they're prepared for that. But the individual amount that they give, we would recommend that you meet with them individually, as if they were a major donor, and ask them. Of course, we would love it if they would join your Giving Society. We'd love it if they would be one of the people who would like to give at one of these levels. If they would give a thousand dollars a year, that would be fantastic. That's eighty-three dollars a month, and some of your board members might say "I'd like to do that. Some might want to give even more down here. But whatever it is, they can give whatever amount, we want to be able to tell the community that a hundred percent of your board gives money. Okay?

So, let's move on now to the top ten check list. I neglected to say the page numbers in the books are here. This is all right out of the book, so I definitely would recommend, if you're going to try this on your own, that you get the Benevon book. I'll tell you how to do that at the end. So, we've got now, the top ten checklist for how to involve your board in the fundraising process. This is really key. A lot of these are questions that you want to ask; kind of reflective questions. You might even want to ask these with your whole board. The first one is, when it comes to fundraising, what are your biggest concerns about your board? And as I said earlier, we find most non-profits have board envy. Everybody else's board is better than theirs, and even those board that some of you are convinced are the perfect board, trust me, they have issues. So, what are your biggest concerns about your board? That's the thing to be focused on. What percentage of your total board members would you rate as truly passionate about your work? These are right in the book, page 51, so if you aren't writing them down, which don't need to be doing, just be thinking about right now with me, "What percentage of your total board members?"

I am amazed... We ask this question a lot at our workshops, and I'm amazed, given the mission types that we work with, which just spans the whole non-profit sector, that I would assume that everybody would tell me eighty percent, ninety percent, and that is not the case. Groups that I would expect that of say, "Oh, maybe fort percent, maybe fifty percent are really passionate about our work, about our mission."

Three: what percentage of your total board members understand the Benevon model, and are eager to participate in its implementation? Not just how many have heard about the model, or nod there heads pleasantly when you discuss a Point of Entry and an Ask Event. But how many of them really understand the model? How many of them really get the depth of this? That this is not about fundraising, it's about deeply engaging the community. It's about weeding through and finding out the people who are really with you on the mission, and will stay with you for the long

term. It's not about getting one time gifts from people. What percentage of your board members really understand that?

Four: what percentage of total board members have attended your organization's Point of Entry event? So, if they say they're supportive of this, if you're implementing this on your own, how have they demonstrated that? Have they actually shown up at a Point of Entry event? Furthermore, have they invited others to attend Point of Entry events, let alone served as an ambassador? What percentage of your board members have been involved in thanking donors? And what percentage give money personally?

Have you completed a Treasure Map interview with each board member once a year? So, this is where you will do a Treasure Map with a board member. You'll sit down with them over coffee or lunch, and say, "Let's look at your Treasure Map, Bob" or, "John," or, "Sally," whatever the name is and who are the people...? This is you in the middle. This is your life. This is Bob's life. What are the groups that you come in contact with? Your work group, your family, your alumni association, your sports group, your kid's school. What are all the groups that you come in contact with on a regular basis? Which of those groups might be easy to put a Point of Entry together with, or at least to invite some people?

Once you get the Point of Entry designed properly, you can even take it on the road and do what we call "Point of Entry in a box". So, Point of Entry in a box would mean, "I've got twenty employees who do..." At our company, we do those brown bag lunch things where we bring in...invite in different non-profits, and it's up to the employee if they want to go. No one's forcing them. But, "Gee, we're having..." If we're having one coming up on a local domestic violence organization, or an arts group, or an environmental group, people can opt into that. If it's an hour long, you can do the full program. We have in the book, how to actually customize your Point of Entry to take it on the road. I do not recommend doing that right off the bat. I think that you've got to get your Point of Entry worked out and refined in your office, but eventually, you could take it on the road. So, if Bob says, "Wow, I could host one of these things right at my office". Or if he says, "I've got three people from my family, and I've got two people from my work, but I don't have enough to do a whole group," you could say "Well, you can invite them to one of those public Points of Entry". Or, we have one man and his own thing was his Monday Night Football group, and he said, "Great, I'm going to invite the whole football group. I'm going to invite you to come out and do it in my living room before the football game starts." So, whatever it is, if you do this personal Treasure Map with each member of your board once a year, you will immediately find that some of them... Again, we don't require board members to host Points of Entry. But, for a lot of them, this is a lot easier than asking their friends for money. Because they have a readymade group, which is the easiest way to host the Point of Entry.

What is your plan to increase or retread your board member's passion? There's an exercise in the book—I don't have the page number here—called "passion retread". This is a very popular exercise, we do it at all of our workshops, where you ask people a simple question. And if you have a whole board...group...whole board is meeting, ask a question at the beginning, which is, "Why are you involved in this organization? What is it in your life that brought you to this kind of work? How did you choose the mission of this organization?" And get people to briefly share their own story. Some people will say, "I'm new to town, I was invited to serve on the board and I did it." Others will have a deep long story. But whatever it is, it gets people reconnected to why they're involved with you.

And then, lastly, do you have an annual board fundraising retreat where each board signs an agreement, outlining their options and requirements for participation? Now, think about this, because a lot of people would say to me, "Oh yeah, yeah. We do that. We have the retreat, and we have them sign the annual board agreement, and they would know the requirements." I've often said, "Well, send it to me. Let me see it." One time I got one that was three pages, single

spaced. It looked like an IRS legal document. It was really impossible to read. I'm sure people just sign it and say, "Take it away," they don't really know. So, make sure that your board agreement is legible and understandable. I've got samples of it in the book, I didn't put one in this PowerPoint presentation.

But here is our outline for a board retreat sample agenda from page 55 in the book. So, this is 90-minute retreat. Now, don't try this if you aren't already using the model. You've got to actually have done some work with the model so you know what you're doing...what you're trying to convey to the board. So, you start with the introductions, then you do the passion retreat I said. Have board members just say why they chose to volunteer here. This is the name of the person who's going to lead this section of the retreat. And then, introduce a legacy statement that your team worked on at the workshop. I didn't go into this here, but it's in the book, where we talk about: what are the specific metrics that your organization want to get out of this? How would you define Sustainable Funding? How would you quantify it? It's not just, "We want a lot of money, or we want a big reserve, or we want an endowment." How much, specifically, do you need? Let the board discuss this, because this is a big topic. In my opinion, the main thing the board should be working on is, "What is the definition for sustainability for the organization, and how can we work to achieve it?"

And then review the model diagram. So, the circle model that I showed you at the beginning with the four points, and show them how the model works and then review your financial goals for your leadership gift sponsorship. All these are in the book, delineated more and more. But you want the board to understand what this is all about. Then tell them about the ambassador concept. Show them the ambassador volunteer job description on page 83 in the book. People will immediately think "Oh yeah, I know what an ambassador is. That means they just want me to invite a bunch of my friends." Yes, we do, but we want them to come to one Point of Entry. We want all those people to come to one Point of Entry event. We'd rather they not be sprinkled through the year, we want it to be done quickly. It's a short-term volunteer assignment. It makes it a lot easier for people if they know that they are going to be doing it once. Now, notice, I did not say board members have to be an ambassador. I'm just saying it is something that is possible as a role.

Inform the guests of what their Point Event will be about, that they will receive one Follow-Up Call. So, if I am an ambassador, and I'm inviting you to come to my Point of Entry, I'm not tricking you. I'm not saying "Oh, we'll go out for dinner. We'll go for a beer afterwards." Although I may very well invite you to do that, I'm going to say, "You all know me from the book club. You know how much I love this organization. I've been talking about it forever. I'm what we call an ambassador, and I'd like to host a special one hour event, to have you learn about it. And, let's all go out for dinner afterwards, and it would be great for me. I would really appreciate it if you would come and be thinking about who else in your world might want to know about this kind of organization." I know that some of you work here, some of you work there; perhaps there's a link that you would have when something will connect when you see the story, when you see the Point of Entry, that will tell you...you'll be thinking of other ways and other people who should be involved. And length of services is one year, or until they complete their commitment to bring ten people, which usually takes three months. If they want to renew their term after that, if they want to continue for another year, that's fine.

Team member job description. I want to tell you. If they decide that they're going to be on the team...on your Benevon team... If you work with us, if you come to our program, you'll be actually bringing a team of seven to ten people. If you want to try it on your own, you still need a team—page 65 in the book tells you this. So what is required for a team member? This is not every board member at all. Maybe two or three, maybe five of your board members would want to be on the Benevon team, which you would probably give a different name. You won't call it the Benevon team, you'll call it the Sustainable Funding team, or the save the children team. Whatever you

want to call it that's related to your mission. But you will want those team members. If I say, "Yes, I'm on the board, but I also want to be on the Benevon team." What do they have to do? They have to come to the Benevon, they have to attend the introductory session or watch our free 55-minute video online. This is one of the best resources we've got, and you all should note that because, after today, if you liked this, or if you've already liked it and you're wondering, "How do you explain this to other people?" that's the video to have them watch. It's free on the Benevon website.

Have them come to an initial Point of Entry event. So, you don't want anybody to get involved in this until they...you certainly don't want anyone to become an ambassador until they've attended a Point of Entry. Then they can be an ambassador. So, if you're a team member, if you're saying, "I'm going to come to that two-day Benevon training with my team from XYZ organization, one of the things that you must agree to do, not optional, is to be an ambassador and bring at least ten friends each year. Ideally, to a private invitation-only Point of Entry.

Number four: they make personal...make a Treasure Map, twice a year, and add names to the list, and make thank you calls, and invitations as requested. They come to Free Feel-Good Cultivation Events. They take on other special roles on the team like being a greeter at a Point of Entry, and hopefully, they'll even suggest some other names of people to be ambassadors. They'll attend your monthly Benevon team meetings—so, this is part of what you'll be having is monthly meetings—and they will serve as a table captain at the Ask Event, and fill the table with nine people who they brought to the Point of Entry. So, team member is an option, it's not required for board members. But let's just go back to this. So, introduce the ambassador concept, make a Treasure Map with them—I said that. Have them each make a personal Treasure Map with at least fifteen people, review the board agreement document, which I did not put in here, but it's in the book: the agreement that they have to sign, which really gives them a number of options. There's a lot of little boxes on there like, "Oh, I'll be an ambassador, yes or no?" Maybe they won't check that one. Or "I'd like to help you with your Point of Entry", or "I will make a financial contribution." So, this board agreement document specifies...it's all delineated in the book. And then you can have a little time for questions at the end.

All of this adds up to 90 minutes, a 90-minute retreat, and we recommend that this happens at least once a year for people that are involved, for any group that we work with at Benevon. Okay, so, I'm going to open up for questions in a minute, let me just go back here and tell you some of the resources that are going to be available to you after today. First of all, I've obviously mentioned the book quite a few times. This is the Benevon store...the link for the Benevon store. We'll give you an e-mail, after this that'll have all these resources in it, but these are the books. So, the book that I'm referring to right now is this one. This book "Missionizing Your Special Events" is fabulous. This is all sold as a package deal. I think it's a \$124.95, and that includes the free...this video. The 55-minute video that I just mentioned, is free on our website, but lot of people, for whatever reason, want to buy it so that you can get the two books and the DVD, the whole package for \$124.95. This book on its own is \$79.95. So, it's a good bargain, but you can only get it at [benevon.com](http://benevon.com).

Then we have the free video, I mentioned that. There's some other videos on the website, also; you can those out. But the 55-minute one is what you really want to watch, and give others to watch. Bloomerang, we just started a wonderful relationship with the software company Bloomerang. In fact, they've designed something called "Bloomerang for Benevon", a customized version of Bloomerang, private version of it just for people who are using Benevon model. It's inexpensive. It's web based. It's super user friendly. As I tell people, "If you can use an iPhone, if you can use a cell phone, you can use this." And to me, that's the most important thing, because if you are going to be using the Benevon model, you darn better be tracking everywhere because you're going to have a lot of stuff to track, and you don't want it to be the kind of thing where you have to write an e-mail to the one person who's trained to use the scary database. And, you don't

want to rely on e-mail, you want to be able to put your own notes in, just the same way as you would put something in your cell phone.

Then we have our live introductory session. So, at Benevon, we get around, and these are some places we're going to be going in the next few months. This will be attached in the e-mail that we'll send you after the webinar today, so you don't have to write them down but, some of you, may be located near one of these. And these are two-hour, free sessions that happen as a way...myself or one of our team will come out and do a session. If you are part of a group that is looking for a speaker, or might like to do a private webinar or private conference call for your members, do let us know because we do a lot of private ones, also, that are not listed on here. Then we have, after the conference call...we have conference calls and webinars—here they are, self-implementer webinar. This is the next webinar coming up. This one, as I mentioned, today's session is part of a series. The next session in the series is going to be on missionizing your special events, and it's on July 11th, at 11 am Pacific Time. So, the same time of day as now, but it will be on July 11th, and you're all invited to attend. In fact, I'm sure we'll send you a little e-mail if you're on this call today.

Workshops. This is what the real work of Benevon is. I say, if your budget size is half a million dollars, or less, you should start with the book. Start on your own. That's who I write the books for. But if your budget is more than four or five hundred thousand, you should definitely consider coming to our workshops. This is a two-day workshop. Here are the dates. We only do seven of these a year, so there's five more coming up. You come with a team of seven to ten people. Let me just say who needs to be on the team. You must have what we call the 'Visionary Leader', and that is the executive director or CEO. You've got to have a team leader, who's usually a development person, and this is the half-time job. And it needs to be one person in the development department, it's a half-time job. You can have one other staff member of your choosing. Some people will have a second development person, some people would have a CFO, or a program person. Two board members at a minimum, two-plus board members, and all the rest of the people leading up to seven, need to be people who are not on the staff. So, they are either going to be more board, they're going to be volunteers, or they're going to be donors. Maybe they're people who've helped you with your gala in the past. So, all together, this equals seven people, minimum. And those seven come to a two-day training—one of these dates here—where you sit at your own round table, and we customize the whole model, just for your organization. So, you'll be in a room...like, Detroit is coming up, I think it's next week. In fact, we have many groups coming to the Detroit training, and they are each bringing a team of seven to ten people. They'll each sit at their own round table at a lovely hotel that we have arranged, with a nice ballroom. And, right up at the front of the room, there'll be an instructor on a little bit of a stage with a PowerPoint...or we'll actually use a similar technology to what I'm using today, to guide them.

Everybody gets about a hundred and twenty page three-ring binder of scripts, and templates, and formulas. And each piece of this is customized for your group. We pause along the way. You meet your coach; your coach sits down with you right at your table from time to time, during the breaks, where you actually customize this for you. So, each aspect of that circle that I showed you at the beginning; each aspect of the model will be customized for you. You walk out of the two-day workshop knowing exactly what your Point of Entry looks like. What are your buckets? What are the stories, the myths, the facts, the needs? We have a special meeting for the Visionary Leaders, to help them prepare their talk. Who's going to do the Follow-Up Calls? We talk about that. What about the Ask Event, when will it be, how much money can you expect to raise? We help you with the whole financial projection for that. And then, what are you going to do with the Free Feel-Goods? All of this is customized. And you've met with your coach. Your coach has signed you off on specific documents that you've prepared during the two days. It's a lot of work, but we've got it down, and people are so excited.

I was talking to a man, we had a workshop a couple weeks ago, and he was there with the team, and he said, “Most of these people didn’t even know one another,” at the team he was on, which is not uncommon. Sometimes, if you think about it, your visionary leader might not know all of your donors. Maybe a board member might not know your team leader, for example. People have kind of come together, and because there’s a structure, and because there’s a coach, and because there’s a process and plenty of time to work on each segment, people come away feeling very connected. That’s what this man said. He said, “These people didn’t even know one another, and now we are a cohesive team with a focus, a plan, and a coach to ensure that we get there”.

So, if after today, you are interested in the workshops, you are going to be receiving a little survey after today. I think it’s got four questions to it, something like that. Right when you hang up from the webinar. And we also have a white paper that I wrote, called “Board Fundraising that Works”, that will be given to you, if you fill out the survey. You’ve got to fill out the survey. There’s four questions, or five on it, I think. Just yes and no questions. If you fill that out, right when you hang up the phone, it will pop up. Fill that out, and then we will e-mail you this “Board Fundraising that Works” white paper, also, just as a gift. And I think that you’ll find it really useful as a summary. But, you will need the book. I don’t want to mislead you, you will need the book if you want to try this on your own.

One of the questions in the pop-up survey is, are you interested in more contact with Benevon? Are you interested in more contact with Bloomerang? What else do you want? What else do you need? Because we will automatically invite you to the next webinar in this series, if you’d like. So, I think that’s all that I have to say. I’m just thinking, Bianca, maybe we can open up now, and let people, if they’d like... Just to tell me... If anybody wants to raise their hand. I’d love to actually interact. We’ve got about 15 minutes here with people to get some more questions answered. So, if you’re willing to come off mute and actually talk to me, you’ve got to tell me the name of your organization, and I don’t know what questions I’ll ask you, but please feel free to raise your hand. And Bianca, you can call on people for me. If you would help me with that, I’d appreciate it.

- Bianca Galam: Yeah, definitely. And I just want to remind everyone how to raise your hand. If you’re looking at the WebEx window, you’ll see the participants tab at the upper right hand of your screen. And once you click on that, you’ll see a little hand icon on the bottom right. You’ll just click on that, and I can see it, and I’ll go ahead and unmute you.
- Terry Axelrod: Thank you, Bianca. I don’t know... I’m not looking at a screen that shows me if anyone has actually written in any questions, either, but we might be able to... Oh, there is Melody asking. She’s saying she doesn’t see it. See that, Bianca? Maybe you can help.
- Bianca Galam: Yes, I will help Melody. And then, I see Alisha. So, Alisha, let me get you off of mute real quick. Give me one second.
- Alisha: Okay. Is it unmuted? It looks like it’s unmuted.
- Bianca Galam: Yes, Alisha. You should be unmuted now.
- Terry Axelrod: Hi, Alisha!
- Alisha: Hi. How are you?
- Terry Axelrod: I’m great! Where are you calling from?

Alisha: I'm in New Jersey. I work for Seabrook House. I'm the development assistant here.

Terry Axelrod: Okay, great! Have you all been using the model? Or, you are thinking about using it?

Alisha: Yeah, we're trying to. One of the board members, actually her organization uses Benevon, so they've, sort of, been trying to push us into using it, and teaching us some stuff [INAUDIBLE 47:00].

Terry Axelrod: Good, good.

Alisha: The question I have is actually, our board members are all over the country, so there's only about two of them that are local, do you think that it would be ok to use the ones that are not actually here all the time as people who could call and say "thank you for coming" to an event, and just state that they are a board member? Like you were saying that it's nice for people to hear that a board member is calling them.

Terry Axelrod: Well, the short answer is, yes, but the longer question I have is, are you doing an Ask Event in New Jersey? Or are you planning to do one? Are you doing Points of Entry in New Jersey? What are you doing in New Jersey?

Alisha: Our main campus, which is where all of our administrative offices are and everything, is sort of out in the middle of nowhere [Laughs].

Terry Axelrod: [Laughs] It's ok.

Alisha: We're a treatment facility. So we are out in the middle of nowhere, for that reason. Then we have little satellite places; outpatient clinics all over New Jersey. So, we would be able to do Points of Entry at any of them, really, but we would most likely start here, on our main campus. And then we do have an Ask Event coming up in October.

Terry Axelrod: In New Jersey?

Alisha: Yeah.

Terry Axelrod: That's great, what you just said, because, even though you've got board members all over the country, if we were to work with you, we would say, "You've got to start in one location and you got to choose where you want to have the Ask Event, and that's where the Points of Entry need to have taken place; in a driving radius that's close enough to the same people to come to the Ask Event." So, yes, if the board members are all over the country, they can certainly call and thank people. Have you been doing enough Points of Entry? Do you have enough ambassadors? Are you really going to be able meet...? One of the metrics... I didn't really state this and I'm just realizing I should do this. Let me go all the way back here to the beginning and kind of tell you this metric that I didn't do, which is the percentage of the people at the Ask Event. I said that forty percent need to... Here we go, this big, messy thing here. Hold on a second, maybe I can erase it all. There we go. At the Ask Event, as I said, at least forty percent of these people must have been to a Point of Entry before, but at least ten percent of these people, of the guests at the Ask Event, will join your Giving Society. At least ten percent. So, in order to get that happen, you're going to have to have... That won't happen if you don't have the forty percent. So, how are you doing on the Points of Entry?

- Alisha: We haven't started them yet. I've collected all the information from... We're using stories from some of the alumni that we have. So, I'm still in the process of doing that, and then getting the okay to have people here for the Points of Entry because we are a treatment facility. So, we have patients right here on campus and everything.
- Terry Axelrod: You may find you want to... With a lot of the behavioral help groups we work with, it's pretty sensitive, and a lot of other groups we work with it's pretty sensitive, also, so you may find that bringing them out to the middle of nowhere, to a treatment facility is not easy or attractive. And it might be easier to do it in town, in people's offices or homes. But, really, whatever you do, you've got to do Point... I mean, you can do whatever you want, but don't call it a Benevon Ask Event if you haven't done the Points of Entry because you won't get the results, and then people would say it didn't work.
- Alisha: Yeah. It's also only me, right now [INAUDIBLE 00:50:47].
- Terry Axelrod: Without a team... I mean, there's a big chapter in the book about... I mean, staff-driven, it just... don't take this personally, Alisha, but it really just perpetuates the fantasy that the magical development director can save the day. And you've probably got a pretty big organization, I would imagine, if you've got facilities all over. Really, without a real team, like I said, the seven to ten people who serve as ambassadors, that's why I said this is hard. It's complicated to pull it off. And you may really want... I'd be happy to, and I didn't really offer this, but we will even do private calls with groups, with their board, to help the board understand what this is. If you think there would be ever any interest in them working with us, because I'm assuming your budget is larger than a half a million dollars for your organization [Laughs].
- Alisha: Right. Actually, that would probably be a good idea because it's really, with the president and everything, he has an interest in Benevon, and he asked me to more research and kind of implement it. Now, the more research I've done and the more things I've read... I've read through some of the materials from one of the board member's organizations who did use you guys. Also, I was at the last webinar series, and I think I did actually ask you a question about the size of the team, and having some push back on getting people to help. I think maybe if we did personal phone call with him included, he could maybe understand a little better why I'm saying I need...
- Terry Axelrod: I'm happy to do that. Let us help you because you've got... I mean, the good news is you've got a board member who already has experienced this or somehow knows about it, so you've got some support on the board. You've been doing your homework. He's inclined this way. Really, if he leaves it to you to do the whole thing, it's not going to be a happy ending, and he's going to think it didn't work and you're not going to look good for your career. So, we don't want that [Laughs]. We want you to look good. I'm a former mental health professional, so I really care about the work you're doing, and you need the money. So, let's arrange that. And put it in your little survey afterwards, when it pops up; you know, write something in there to me, and I'll read those, and I'll be glad to arrange a call like that, if you think there's interest. Okay?
- Alisha: Great! Thank you.
- Terry Axelrod: Okay, thanks a lot, Alisha. Thanks for being the brave first person to raise your hand. Okay, Bianca, have we got any other brave souls? [Laughs]
- Bianca Galam: We do, we have Rachel Berry. Rachel, are you there?
- Rachel: Can you hear me?

Terry Axelrod: Yeah, hi.

Rachel: Hi.

Terry Axelrod: Where are you calling from, Rachel?

Rachel: We're calling from Nevada City, California.

Terry Axelrod: Okay, great. What kind of organization are you with?

Rachel: We promote local food in our community, through schools, and promoting farmers, and helping people grow their own food in their backyard.

Terry Axelrod: Wonderful. Okay, what's your question?

Rachel: And, one of your students is here: Malika Bishop.

Terry Axelrod: Oh my gosh. Hi, Malika!

Malika Bishop: Hi there. [Laughs]

Terry Axelrod: How are you? Oh my gosh, it's been a long time.

Malika Bishop: It has.

Terry Axelrod: Nice to hear your voice, yeah. Okay, thanks for joining us today. What's a question I can answer?

Malika Bishop: Well, we've been self-implementing here for several years now, and we're just looking for more details on the bless and release process.

Terry Axelrod: [Laughs] Okay, like what? [Laughs]

Malika Bishop: We've been keeping a lot of the people who attend our Point of Entries on our mailing list, even if they aren't engaging and wanting to be donors. We're wondering about that, and just how you decide who to bless and release, and what that means to you.

Terry Axelrod: Okay, great. So, they come to Point of En... Are you doing Points of Entry?

Malika Bishop: Yes.

Terry Axelrod: Okay, so, people come to the Point of Entry. They get the Follow-Up Call. You should assume that you will be blessing and releasing fifty percent. If you're not, then you're probably being overly optimistic. Now, by bless and released, what do we mean? We mean do not put them on any mailing list, do not send anything to them. You may put them in your data base, in fact, you should put them in your data base because they attended a Point of Entry, and they may very well pop up later, so you don't want to not know them at all. But do not put them on your mailing list, do not mail to them, do not ask them for more money. If you have a sense of, they're just kind

of nicely saying “Oh yeah, it was a nice thing. Thanks a lot,” do not add them [INAUDIBLE 00:55:17].

Malika Bishop: So, you’re saying, don’t ask them from them for money, but, could we put them on our e-news list, so that they’re getting updates about us?

Terry Axelrod: No. If they are a real bless and release, we don’t even do that. We really just let them go, totally. And definitely don’t ask them for money. Definitely don’t ask them for money. Honestly, what we find is that the more you’re willing to...bless and release is a wonderful paradox because people will come back. I’ve had many people I’ve blessed and released who send me other people because they’re honored that I respected that they didn’t really have it... It’s not that they didn’t love my mission from my organization, they just were busy and it wasn’t their thing right then. They didn’t need any more mail. You can ask people. We have some groups that will ask, “Is it all right if we put you on the mailing list?”, and of course, everybody is going to say yes, because they don’t want to be rude, and then they’ll delete it. So, I would rather you just trust your instinct and say... If you are on the cusp of wondering, I think you could say, “May we put you on the mailing list?” But, if they’re nicely trying to tell you no, don’t even go there. Okay? That may not be the answer you wanted to hear Rachel but, there you go. Okay?

Malika Bishop: Well, it’s [INAUDIBLE 00:56:30] to hear it. That’s not what we have been doing and [INAUDIBLE 00:56:33].

Terry Axelrod: [INAUDIBLE 00:56:34]

Malika Bishop: We’ve been really just blessing and releasing people when we’ve cultivated them as a donor and they are clearly not interested in being a donor. So, to cut it off so much earlier is a really interesting twist for us [Laughs].

Terry Axelrod: Yes, well, it would’ve probably saved you a lot of time the other way, too. I think that focusing in on the people that really care, and we’re just kind of constantly saying, “I’ll...” And definitely look for more ambassadors in those Follow-Up Calls. The ambassador process, Malika, is something we introduced, maybe five years ago. It wasn’t there when you came through the training years ago.

Malika Bishop: Right, we have adopted it.

Terry Axelrod: You have? Great. Terrific. I think we might have time for one more quick question. Do we have any more, Bianca?

Bianca Galam: Yeah. Tess, you should be unmuted. Are you there?

Tess: Hi. Can you hear me?

Terry Axelrod: Yep, gotcha.

Bianca Galam: Yes.

Terry Axelrod: Hi, Tess.

Tess: Hi.

Terry Axelrod: Where are you from?

Tess: I'm from Massachusetts. [INAUDIBLE 00:57:38].

Terry Axelrod: Great. What's your question? And tell me what your organization is.

Tess: Okay. We are a performing arts education organization here in Massachusetts. We have a very, very small staff and very small pledges. So, we have not started self-implementing yet but we would love to. And one of the things we will need to do is hire a development person. I'm currently serving that function, but I won't be around that much longer. So, I need to find someone who would be an appropriate team leader. I wondered if you had any advice on finding some fundraising professionals who would work well with the Benevon model.

Terry Axelrod: Yes, there is a team leader job description in the book. So, I would recommend you look that up. There might even be one, just free, on our website. I'm not positive. I think we might have it on there. It tells what they. And, really, when a group comes to Benevon and we're training them, we tell people, "Don't over hire. You don't need to hire the major gifts person from Harvard", I mean, you're in the Massachusetts area. You know what I mean. You don't have to overdo it, because we are going to train them and coach them. But if you're doing it on your own, if it's a smaller organization, I would say, get somebody with a few years' experience. They don't have to have a ton of work experience. They need to be outgoing, very detail oriented, very good with people, like talking to people on the telephone and willing to really speak up if you've got to kind of corral a team. You don't want somebody who's going to save the day, and try to do it all of their own. Okay?

Tess: Right, thank you.

Terry Axelrod: Yeah, very good, Tess. Listen, all of you, if you have more questions, in that pop-up survey, put your question in and we'll do our best to try and answer them. I can tell from what Bianca's telling me, there are lots of other people who are asking questions, that we're not able to get to. But I want to respect everyone's time, and I'm one minute over, and I want to thank you all. Come back on July 11th. We'll have our next webinar, for self-implementers. And invite your friends who are self-implementing. And, if you are interested in coming to the real Benevon program, we'd love to have you. So, answer that survey and we'll send you the free white paper on board fundraising networks.

Thanks everybody, have a great day. Bye-bye.