

Zoë: Hello everyone, we're going to get started now. My name is Zoë Erb and I am from Benevon, joining you from our Seattle office. I want to welcome you all to the Benevon Self-Implementer Webinar: Engaging Your Community as Ambassadors and Donors. The webinar today will be led by Benevon founder and CEO, Terry Axelrod.

Terry: Hi everyone, really excited to be with you all today. Thank you for joining me. We've got a wonderful webinar planned for you. We have a large turnout, thank you all for again joining. I read the information that you've sent us when you submitted your name when you registered for this, and there was a lot of good background that we were able to extract from that to learn how much you've been using the model. And, honestly, for most of you, it looked like you are relatively new to the model, or this is your very first time hearing anything about it. So, I'm going to really be focusing today... This is the first of a series of four webinars that we have for self-implementers. Actually, this is not the first one, but this is part of a series. And we've been offering this series a little more informally. We're going to begin to formalize it over the next few months. You'll be seeing more about this on our website. In fact, the next one after this, I'll just tell you right now, is September 26th. So, there are four different topics that we have that, for self-implementers, if you want to try using the model on your own, you would need to understand all the pieces of it.

And today's webinar is on engaging your community as ambassadors and donors. And that's because when most people think about Benevon, the people who have heard about us often know us because they have attended or know someone who's attended a fundraising event, or perhaps they've attended a Point of Entry event, both of which I'm going to explain in a minute here. But they often think of Benevon as fundraising. We don't think of Benevon as fundraising. We think of Benevon as community engagement. Imagine if you had a community full of people who really understood your mission, who deeply appreciated what you do and were giving to you. If they chose to give to you at all, finically, it would be because they believed in your work. In fact, your organization would be one of their top three charitable gifts that they might make in their lifetime.

So, we're looking, with this model, for people who so believe in your work that, of course, they would give you money if they could, but perhaps they'd give you other things, too. Most of all, the very best thing they can do to help you is to serve as what we call 'ambassadors' in the community for you.

Most nonprofits we work with — and Benevon's been around now, we're in our 21st year— we've worked with over 5,000 nonprofit teams of board members, staff, and volunteers, mixed teams, that come to our two-day workshops and are then coached for a year or longer. So, we've worked with over 5,000 teams in that way, and what we see over and over is that, while it may look like people are coming for fundraising, ultimately, they're finding that this is a model for deeply engaging the community. Imagine, again, if your community really understood what you did. Imagine if they really appreciated. Even if you're a brand name... And we work with many of the larger nonprofits, also, that are names that will be very familiar to you; we find that people don't really understand fully what they do, what those organizations do, let alone if your organization is not as well known to people.

So, by getting the word out, this is a process for that. Most groups think that the board members are the ones whose job it should be to do that. And if you've got a great board, what the heck, that's supposed to be what they do. They're supposed to be the ones who get the word out and, often times, also send out letters and ask their friends to write checks. That is not what this is about. Not that we wouldn't love to have the board members involved, but we certainly don't require anything in our model that the board members must do, until they at least see what this is and choose to do it, if they'd like to. So, the

very best way that people can help your organization is by serving as what we call an 'ambassador', and that's going to be the focus of today's webinar.

So, let me go ahead and get started. I want to just show you the model. You've got the circle here, this is the Benevon Model. Oops, well, let me see if I can get this to work. Hang on a second. There we go. Engaging Your Community as Ambassadors and Donors. And I'm going to be working out of material from the book, "The Benevon Model for Sustainable Funding: A Step-By-Step Guide to Getting It Right." Now, if you choose to come to our workshops, which I'll tell you about at the end, we give you a set of all of our books as part of the tuition and the process for being in our program. But if you do decide you want to try it on your own, this is a great book. What it's written for is for groups that want to get started on their own. Usually, for smaller groups, I say budget size about half a million dollars or less, it probably would be a good idea to get started with the book. But just for today's purposes, since many of you have budgets that are larger than that, also, I'm going to cite some of the pages as I go through.

I'll be highlighting five key metrics we have found at Benevon, because we've been doing this for so long, we have...and because each group that we work with submits all kinds of data to us annually, which we pour over and change things — we change formulas, we change whole processes — that there are five key metrics we've developed that if you just stick with these, if you just meet these five metrics, you will be building what we call Sustainable Funding. See, I think of Benevon as a pipeline-filling system for major gifts. The groups that come to Benevon are not usually the big universities that already have a readymade pipeline. Who is their pipeline? Think about it. Their pipeline are their students. They've got alumni, every year. Most of the nonprofits we work with do not have a steady stream of alumni, nor do they have a large, very well organized, sophisticated major gifts department. They usually have just a handful, maybe only one, even, development staff member who is charged with doing everything to keep it going. So, by having these metrics, it makes it very clear to people what you need to do to be successful with the model. And this is also...these are also great metrics to share with your board, to show them that, should you adopt the Benevon model, there are very specific things you would need to be doing. I'm not going to list them all out for you here, right now, but I will as I go through this.

So, let's dive in. I'm going to tell you how the model works, just briefly, as an overview, because so many of said on the form that this would be your very first time learning about the model, so I want to be sure to give you all of it. And as I do this quickly, I will point out the five key metrics. So, the very first step of the model is what? It's called the Point of Entry. The Point of Entry, what we call a sizzling one-hour get acquainted event about your organization. So, if I were a funder who said, "I'm thinking about making a \$25,000 grant to your organization, but first I need to come and see it. I need to take a tour," how many of you would say, "Yes, I could offer that. We have something we could show you"? That tour that you would be taking me on is more of what I would call a tour of your facilities, or a tour of your programs. A Point of Entry, on the other hand, is what we call a tour of your mission, and it's got to include these three things over here: the facts, an emotional component, and a way to capture people's name with their permission.

So, the very first metric is that if you're going to be using the model, you would be putting on two of these per month, each with 10 people or more; 10 or more people. It's usually 10 to 15 people. And each one of them is hosted privately by someone we call an ambassador. Okay? So, privately. That means that it's not something we put on Facebook. It's not something we...it's not an open house. These are me inviting me whole book club, or my whole yoga group, or my friends. A readymade group, usually. My office colleagues, something like that. Privately, so I feel...so that you all feel very special that I've invited you. My relationship with you is what drives a large part of this whole model. So, two

per month, minimum, for 10 to 15 people, each one hosted by an ambassador. That is one of the key metrics. That's one of the metrics, what I just said, all of this over here. Okay?

And let me walk you through a little bit of what a Point of Entry looks like. This is from page 119 in the book, and there's a whole chapter...actually, more than one chapter in the book on how to do this, so you can look. This is kind of giving you an overview. But you're going to decide which is the best time of day or week to have these, after some experimentation. We had our little school where I started this, did these on Thursday mornings at eight o'clock. We had a student greeting people; a little sign-in table where people filled out an individual card giving their name and address, and their email, and their phone number, because they knew in advance that we would be calling them.

You see, the person who invites them, the ambassador, makes it very clear when they invite them — and I'll get into this a little bit later — that the whole purpose of their coming is to help spread the word that you are... "This is an organization I love. I've been involved of a number of years. I've been talking to book club about it for quite a while, and I have agreed to be what we call an ambassador. And I agreed to host a little private tour. I'd love to have you come. We'll do it right before we go to our book club, or we can go out for a glass of wine, or a dinner, or lunch, or coffee," or whatever related to it. "And you will be getting one phone call afterwards from the organization, to see if anyone else came to mind that you might like to invite, and to get your feedback. Perhaps you'd like to get more involved, and perhaps you'd even like to become an ambassador like I am. You just don't know, as you're there, you might be thinking of other people."

So, they know in advance they're going to be asked to sign in, and that they will be getting one follow-up phone call. If they come early, there's a little time to look at pictures on the walls, or in our case, watch the students eating breakfast and having teachers help them with their homework. The bell rang and the kids ran off to class, and we were there in this rundown old lunchroom. We mopped off a couple tables and pushed them together in a little square, and started our program.

Now, the Point of Entry is not formal at all. It's very informal and it feels like you've got a bunch of friends sitting around a kitchen table, kind of. So, there's no PowerPoint, there's no microphones, there's no teacher/student effect at all. It's just much more of an intimate setting. And the first person to speak is the ambassador. So, there I am again, welcoming you all as my friends. I'm saying, "Thank you all for trusting me enough to come today. I'm so excited that you're here. You know how near and dear this place is to my heart, and I hope that as you walk around today, you'll be thinking of others. Because when Susan calls you in a couple days, she'll be wanting your feedback."

And then I tell a little bit about why I'm so passionate about it. So, it's what we call the 'personal connection,' so I'm going to tell you what it is about this organization that's hooked me. What is about something in my life? Something a little bit more personal about why I'm involved here.

And then I turn it over to the Visionary Leader, that's the executive director or CEO, who says what their personal connection is, which is very important. People want to know, "Why is that man," or, "woman running this place? And how come they're so passionate about this particular type of nonprofit work?" And then they brag in the middle of that one minute here. This part is two minutes; this part is one minute and it's bragging about the results. What are some of the things that you've accomplished in the, what we call, three 'bucket areas'? So, we take all that you do. We're going to do that as we go through here. We take all that you do and divide it into three broad buckets.

So, some of you on this call have way more than three programs in your organization. You might have seven, or eight, or twenty-five programs. We don't just cherry-pick three of your best programs and call those buckets. No, we cluster all that you do in 100% of your programs into three broad buckets. So, it might be something like supporting individuals, strengthening families, building community— broad buckets. And right here in the Visionary Leader talk, the executive director shares something that they are most proud of in each of these three buckets. A little, quick brag; kind of a preview for what's to come in the Point of Entry. And then there are two more minutes on the vision for the future.

So, most Visionary Leaders— and I know we have quite a few of you on this call, at least according to the list many of you are executive directors or CEOs. You are hugely visionary, but the problem we have is that, so often, when we ask a Visionary Leader to share their vision, they're too good. They sound like they have the whole thing so figured out that people think, "Well, what do they need me for? They've got it all handled." So, we spend a lot of time with the groups that we coach personally in our programs, in our year-long workshop and coaching program. We coach the Visionary Leaders in this entire talk so that it all hangs together and lets people know, "We have a vision for the future, but we're going to need some help to get there."

Next, we get up and walk around. We take a tour. And the tour consists of three stops, and each one of the stops, which relates to one of the buckets, we tell a myth-buster fact, a story, and a need. So, some of you, just for example, maybe some of you on the call here work in the area of transitional housing. We worked with a group that had wonderful transitional housing programs, and we took people on a tour. They took people on a tour, I went on the tour. It was upstairs in a three-story walkup, older apartment building. Clean and nice. And when we got to the top of the stairs, about ten o'clock in the morning, bright sunny morning, the woman taking us on the tour said, "Many of you may not know this, but the average age of a homeless person here in our community is nine years old, and that's because there are so many children that are homeless. In fact, this morning, right here in our very...the spare room we're in, we said a very bittersweet goodbye to Maria and her nine-year-old son Johnny, who had been here for six months which is almost twice as long as the average family stays here, but that's because they came from a terrible domestic violence situation. Johnny had been kept home from school much of the year. Maria had not been working. They needed help with counseling, healthcare, job placement, job training, financial, housing, transportation, all of it, and we were able to help them put their lives back together. And when they walked out of here this morning, there were a lot of hugs and tears as we said goodbye to them. We're so proud of them as they launch their new lives. For every family live Maria's and Johnny's, what we see is that we need one more caseworker, because that one caseworker would allow us to serve another 35 families and greatly reduce the waiting list so the people don't have to wait as long. We have a long waiting list, that would allow us to cut that down significantly."

So, that kind of gives you a sense of the myth about the nine-years-old. The fact is really, the average age is nine years old. The story that relates to that about a family and the need. In the need, we don't tell the amount of money we need, we're not asking for money in the need, we're asking people...we're telling people what the money would buy. So, we never ask for money at the Point of Entry, at all, and we do this three times, each one very powerful. Sometimes, the stories are told, like I did kind of third person, "Let me tell you about Maria and Johnny." More often they are told with a letter; through a letter or an audio tape. We don't use any videotape here. So, you're hearing from the voice of the actual family or individual that was served.

And then we end with a live testimonial where someone gets up and talks about how your organization changed their life. So, it's ideal if you're going to be doing these twice a month, that you have someone on your staff or very nearby, who's there on the premises, so that if you're doing these frequently, you don't have to go find a new person to tell their own story. In our school, it was a teacher who had been a student at the school, and his lifelong dream was to finish his degree and be able to come back and teach there, and his story was really powerful.

And then we had a final thank you from the ambassador, "Thanks again for coming. I hope that you've really seen why I'm so passionate about this place. And I hope you'll take Susan's call in the next couple days when she calls you, and be thinking about other people in your life who you'd want to have know about this place. Thanks, and have a great day." That's kind of how it ends.

And then that leads to the second step in the model, which is a one-on-one follow-up call with every person who's come to the Point of Entry within two or three days. And the metric here, the second metric, is that you want to have at least one new ambassador be generated out of the follow-up calls from every Point of Entry. So, if you've got 10 people over here, who've come to the points of entry, you want to have one out of every 10 people, in that case, would say, "Yes, I thought that was so great. I have a group myself. The whole time I was there, I was thinking about my work group," or, "my friends," or, "my book club," or, "my football buddies," whatever. And that is the metric, is at least one out of every 10 people. It's actually one out of Every Point of Entry.

So, we have groups that put on these Points of Entry, not twice a month like I said, but we have groups that may put them on way more often than that. They may put them on 10 times a month. 10 times a month, they'll put them on. So, that would mean that they'd be getting 10 new ambassadors per month, right? So, the idea is that you're not asking people to be an ambassador more than once in their lifetime; if they want to do that, that's great, but it's not like we have to go back to people over and over, and over and over. People are human, they have a certain number of friends and a certain amount of time to dedicate to this.

So, the follow-up call has five steps to it. Again, out of the book, pages 33 and 34. You want to thank people for coming, and you really have to mean it, and ask them what they thought of it. Listen closely. And then ask, "Is there any way you can see yourself becoming involved with us? Or anyone else you can think of we ought to invite?" And that's where people will often say, "I really would like to be an ambassador. I want to be like my friend was," or, "The whole time I was there, I was thinking about my work group. I work at the community college, we have programs every day here for people in that kind of a situation," or, "we have counseling programs. I'd like our own staff here to know about what you're doing. I'd like to host one of those." So, it doesn't have to be a big, hard thing to be an ambassador. Most people have a readymade group, and that's the easiest way to find a successful ambassador, is with a readymade group.

Okay, on to step number three where we finally get to ask for money. Notice we didn't do that at steps one or two, we wait until people have been well cultivated, and that happens in this second step here, the Cultivation Superhighway. So, the Cultivation Superhighway is where... I think of the Point of Entry like a first date, and the Cultivation Superhighway is where we have some more dates with those people who are interested. You see, in the follow-Up call, about 50% of the people are what we call 'blessed and released'. Blessed and released. Those are people who say, "You know, it was really great, but I don't have time," or, "That's not really my thing, or they don't even call you back.

So, we allow in our model, 50% of the people to be blessed and released. Of the remaining people, one will be an ambassador and all the other five, you're going to want to do this dating process with, inviting them back to things. Cultivation steps that focus in on aspects of what they most liked. So, in the follow-up call, if they said to you, "You know, I really love that art program that you're doing with those kids," you're going to want to invite them back, perhaps to meet with an art teacher, to come to an art night, to maybe invite their friends to come over and be volunteer art teachers in your school, whatever. But it's something that relates to their specific interests. It's not like you're just inviting them to another event that's more of a generic kind of an invitation. So, each one of these, very personal.

We tell lots of stories about people in many... If any of you are self-implementing, you probably will know that you've got people who, just by coming to the Point of Entry, will say, "This was really great. I want to come back. I want to bring some other people," and as their friends get more involved, they get more involved. So, by the time you get around to asking them for money, down here in step three, many people will be wondering, "Why hasn't anybody asked me for any money yet?" You know, they're out there talking to their friends about you, and you've become their thing. They are very, very passionate about you.

So, the ask happens in two ways: either one-on-one, or it's something we call a free one-hour Ask Event. So, the Ask Event is what many people know when they think of Benevon, which unfortunately is not the only thing that Benevon's about at all, in fact many of our groups don't put on the event, or they skip a year from time-to-time because they have so many donors. But at the Ask Event is a free one-hour Ask Event, like I said, and every one of the table captains — this is metric number three — 100% of the people who serve as table captains at the Ask Event have been, guess what, ambassadors in the prior twelve months. And guess who is sitting at their table, all of the people who came to the Points of Entry up here. At least 40%, and usually it's 50. And my first Ask Event, it was 80% of the guests at this Ask Event are people who have been to the Point of Entry. So, they come to the Point of Entry and then they come to the Ask Event, and they're sitting at the table of a friend who's an ambassador. That is the only way that you will the metrics.

So, the one-hour Ask Event, very powerful. It's quick, it's easy, it's in and out. And, again, the only people who should be coming there are people who've already been to the Points of Entry. If you end up having a few people who haven't been to a Point of Entry, let's just say you get 80% who have and 20% who haven't, the 20% who haven't should not be giving you any money at the Ask Event. In fact, many of the 80% may not even give, but we certainly don't want anybody giving money at the Ask Event unless they've been to the Point of Entry.

So, here is the pitch that we do at the end of this one-hour Ask Event. You can read about it in the book [INAUDIBLE 00:22:30] format for the whole event. It's very, very moving. There is a video. There's testimony, there are stories throughout. There's a powerful talk from your Visionary Leader in front of a larger audience, and it ends with a pitch where someone gets up and talks about why you need the money.

So, at our school, the man who did this was fabulous. He said, "My name is so-and-so, I'm on the board here at this school. I love this school. We know many of you didn't know what we were going to ask you for today, so you just came because you trusted us, and let us tell you what we really need," and he told them about how we've had to give raises to the teachers causing a shortfall in the operating budget of half a million dollars, now up to six hundred thousand. "And out of that," he said, "today, we're launching something called the Sponsor a Student Society," and he asked the table captains to pass out

the pledge cards. He said, "If you believe in what you've seen today, and you'd like to help to support the ongoing operations of our school into the future, we'd like you to become a founding member. The first level is, if you would consider giving \$1,000 a year for each of the next five years, you'd be sponsoring a student." Out of 850 people, 115 people checked that box. Now, the IRS requires you must report all pledges as if they are received on the day they are pledged. So, by IRS standards, we had just raised over \$500,000.

And he went on, he said, "We know some of you are capable of giving even more. If you'd give us \$10,000 a year for five years, you'd be sponsoring ten students," eight people did that, "and \$25,000 a year for five years," four more people sponsored a whole classroom of students. He said, "I want to thank those of you who've just become founding members. And now I'd like to ask the rest of you, who may not have checked off a box at all, to tell us in the fourth box how much you'd like to give and for how many years. In other words, a fill in the blanks box, leaving the donor right in the driver's seat, which is the only place to leave your donor. Some people said, "I'll give you a \$100 once," or "\$50 three times." Whatever they wanted to give was absolutely fine.

The last box, we had typed it in and it said, "Please contact me. I have other thoughts to share." This was for the people who, even if they had checked one of these top three boxes, might have other ideas: want to sell real estate, transfer stock, just give you some opinion, introduce you to their friend who's on a board somewhere. Whatever it was, we were very happy to give them a call.

So, when you stand back and take a look, from fewer than 130 people, out of 850, which is only 15% of the people, we had just raised nearly a million and a half dollars, when you include all the pledges. And we were shocked. I wanted to know, "What had we done right?" So, I got back on the telephone and I started to call those people, and I said to them, "Thank you so much for coming yesterday. What did you think?" I was quiet and I listened and they all started telling me the same thing. They said, "If I had known how great that event was going to be, how terrific your school as, I would have invited other people."

This seems to be the natural human response, when people feel they've made a real contribution, and they started telling me the names of all these friends and family they wished had been there. And that's when I said, "Well, no problem. Would you like to, between now and next year, become an ambassador? You would have an opportunity, right now, to invite those people to our Point of Entry. You could become an ambassador and invite them, and that's the fourth step in the model, introducing others. You invite them to the Point of Entry, where we will educate and inspire them, we will follow up with them."

So, the idea is that people would then invite their friends to Points of Entry, we would follow up, and then eventually, they would come and be table captains the next year. So, over and over, the model goes round and round, and people are getting new people. The ripple effect starts to happen, and the model expands out and out and out. That's what we want for you.

So, I want to go forward now, to the whole concept of ambassadors, and really talk about what that would entail. So, let me go back and review with you the five key metrics, first of all. I neglected to say this very last one, which was...this is a minimum of 10% of your Ask Event would join the Multi-Year Giving Society. The average Ask Event will have between 200 and 300 people, and that we would expect 20 to 30 of those people, then, would join the Giving Society.

And if you do that year after year, it really will grow, but that means that you must have new people at the Points of Entry, new ambassadors, new table captains. This is not about having the big event in town. This is not about having the same people come back every year, because they love your events so much. No. We are not about the event. We are about the relationship that's being developed. So, here you have these five key metrics of the Benevon model. And I would say this will...if you can adhere to these five, you will be successful. They are not easy, but they are definitely attainable.

Okay, so I want to shift gears now, now that I've kind of given you the overview and you've got the jargon down, to talking about what it would really take to grow this. How are you going to find ambassadors? How are you going to find those people? So, we say...we do an exercise at our two-day workshop, where you'll have your whole team with you. It won't just be one or two of you, what we call a Treasure Map. You stand up at the wall, and you've got one of those big, sticky Post-It notes, those white sheets, and in the middle, you put your organization, the name of your organization, and then, you surround yourself with all of the groups that your organization comes in contact with on a regular basis.

So, who would those be? It might be your board, it might be your staff, it might be your volunteers, it might be your donors, it might be your vendors, it might be other nonprofits in the community, or, if, let's just say you work in the medical community, it might be other healthcare providers, like that. You've got natural groups that your organization comes in contact with. And we even have you look more deeply around each one of these, like, we have former board members, we have advisory board members, different sub-boards that you might have, maybe committee members around our staff, we might have former staff, we might have program staff, we might have administrative staff.

Volunteers, if you have a volunteer program, a lot of groups will have different categories. I mean, a Red Cross chapter might have health and safety volunteers, they might have people who do fire, you know, disaster, and fire like that. Food banks have volunteers in different kind of sub-categories. And certainly, around donors, you've probably all got donors, some of whom give from events, some of you...you know, you have gold donors, and donors from the gala, and you've got donors who give through direct mail, and you've got foundations. You know, you've got a lot of people.

So, by the time you do this in the healthcare community, you know, you've got all the different contacts you've got. So, by the time this is done, we even look at, you know, what resources does each one of these groups provide? You know, does your board... What are the things that your board brings? What do they have in abundance? We like to say that the Benevon model is an abundance-based model. So, we're not looking for...asking people for things that they have in short supply, and to give you their very last once, we're looking for things that people have in abundance that they would naturally want to give.

So, some board members have what in abundance? They have a lot of contacts. Some of them have money, some of them have time, they've got different things. Each board member brings different resources, so we're going to think about those. Some of the staff have different things in abundance. And certainly, one of the things your staff have in abundance are stories, and that's very important in this process, that they can tell you those stories firsthand. Your volunteers might have an abundance of time, some of them. They might have real passion. They might have a desire to, you know, get this on their resume, or they might have kind of a social motivation.

So, you really want to look from the perspective of the people on the Treasure Map, at what are the

things that most would make them...would have them want to be involved with you? Okay, so, we do that Treasure Map, and then, we also...and out of that, we identify a number of ambassadors. We have each group at the workshop make a list, and this is written up in the book. It's tricky to do in the book, because you've got only one person reading the book, whereas if you're at the workshop, you've got 7 to 10 people, and they're all buzzing, because you're all together standing there at the wall, kind of work on this together, and going, "Oh, what about this group? What about this group? You know, we forgot about all the clergy in our community, or we forgot about the elected officials, or the sponsors of other events in town," something like that.

So, within each group, you come back from this whole exercise, from being at the wall, and you make a list of about 30, at least 30, people that are capable of being ambassadors. And you might think, "Well, gee, you know, the volunteers already know what we do. They would never really want to come to one of these Points of Entry." But what we suggest is that you identify volunteers in...you identify a lead volunteer. Like, let's say you're a food bank, and you've got the volunteers who come in on Fridays, and they pack the backpacks for the kids who are...to take home with them on the weekends, so there will be food for them and their families on the weekends.

So, you want to have...who's one of the key volunteers in that Friday volunteer group? And have that person become your what we call ringleader, and they call back, or they invite all the other Friday volunteers, and say, "I'm going to be hosting or organizing one of these tours that we're doing now." And the other volunteers might say, "Well, what do we need to go to that for? You know, we already know the place. We're here every Friday." "Well, yeah, we do know our part of it, we know what we do on Friday, but we don't know all the rest that's going on here. A lot of other things are happening here. And I'd love to have us all be together to come and learn about it." So, that becomes...that person, right here, becomes your...an ambassador over here. And you can find ambassadors within probably some of your gala donors, or perhaps even your gala volunteers. You can find ambassadors amongst your board members, some of them, some of the board members, and even amongst some of your staff, although we certainly don't ask that staff be ambassadors. Many times, they want to be. So, you're going to come up with a long list of individual ambassadors.

And then, we look at your personal Treasure Map. So, let's pretend you are one of the people on your Benevon team, when, as I mentioned, 7 to 10 people, a team has to include the Visionary Leader, which is the executive director or CEO, the Visionary Leader, and the team leader, who is the development director, usually, the team leader is the development director, and then one other staff member, who may be a staff of any of your choosing, it could be a staff member who's a program person, it could be a marketing person, and then, two board members minimum, otherwise...we saw two to three. Usually, it's a board chair, and it's a board, maybe, the development chair, if you have a development committee, development chair. Sorry, I don't know why the pen is doing that, I guess it's the way I'm doing it, sorry. And then, two or three or four other people who are not on the staff. So, those people, three...I just put three others. It usually equal 7 to 10 people. And these three others are either volunteers or board members also.

So, if you take this whole team, and if they're going to be your core team that's working with you for a year on this, you're going to have them each agree to be an ambassador before they even embark on this process. So, they will be doing their own one of these Treasure Maps, and they will each look at who's in their life, "Oh, these are the people in my book club, these are the people in my faith group, these are the people in my exercise club, whatever, my work group, my kids school." You know, you've got the natural groups that they have. And so, you want them to do a Treasure Map too and identify

who are going to be the 20 or 30 people, because in order to get 10 or 15, they're going to have to invite a lot more than that. Ideally, they just pick one whole natural group, like, I said, the book club, they already know they meet on Tuesday nights, or Tuesday coffee or whatever, it's very easy...it's a lot easier to say, "Let's all do it before we normally would meet, and we'll go out and get something afterwards or before." We have people who do these in conjunction with their Monday night football game, people who do them all different ways, but they find a time that really is convenient for the natural group that they're with.

So, let's just imagine now that you have got 20 or 30 people who are on a list to become an ambassador, that in your mind, they'd make a great ambassador, but they don't know much about this at all. [Laughs] So, you've got to figure out, how are you going to invite them to be an ambassador? You've got to call them up and you're going to say to them, "Do you want to be an ambassador?" Well, you can't do that until what? Until you've invited them to a Point of Entry. They've got to experience what they will then be inviting other people to attend, right? So, you can't just call them up and go, "Want to be an ambassador?" You've got to call them and invite them to your Point of Entry first.

So, I'm going to describe the volunteer job description here. I'm going to show it to you. This is from page 83 in the book. So, an ambassador is a short-term volunteer who opens doors for the organization in the community, introducing more people by hosting and filling the Points of Entry, which you're not going to call a Point of Entry, you'll call it, you know, "Welcome to the Red Cross," or, you know, "Getting to know us," or some other name that's kind of warm and inviting, with 10 or more guests, okay? And the main qualification is that they're passionate about your mission, and that they'll follow through, that they will actually deliver and do what they say they're going to do.

The roles and responsibilities, they need to come to at least one Point of Entry themselves every year, and they host and fill a tour for 10 or more within three months of agreeing to become an ambassador, so this is a short-term volunteer assignment. Yeah, they can have it in their home or office, but it's really easier if they have it in your offices. It's a lot easier for you all to have it at the organizations offices, because hopefully, once you practice this a few times, you'll figure out the best time of day or week, and you'll have your people and your props all ready, so you don't want to be having to go on the road a lot, although there is a chapter in the book about how to do what we call...or a section in the book on how to do what we call Point of Entry in a Box. And they've got to inform the guest of what this is going to be all about. So, and especially, as I mentioned earlier, that they're going to receive one follow-up call from the organization, and they're not going to be asked for money.

So, you've got to make sure that those two things must happen. They're going to receive a follow-up call, and they will not be asked for money. And you've got to...they've got to aim to have at least one of their guests become an ambassador after the Point of Entry. So, let them know right up front, you know? "Barbara, if you would like to be an ambassador and invite your book club, in the example I've been using, be thinking right from the beginning, right from when you first invite those people, about who in that group might have some other people in mind." But don't get too smart about it. I was just thinking, the first Point of Entry I did at the school where I started this, I invited my sister. And she did not know that she was part of another group that ended up having two of the seven women in this coffee group she was in actually became ambassadors, because they cared about what we were doing at the school. My sister never became an ambassador, but they did. They really loved what we were doing, it was really their passion.

So, you want to let people know our greatest...the greatest way you can help us, the very best way you

can help us, is to spread the word. More than giving us money is to help us get more people to know about what we're doing. So, you want to aim to have at least one become an ambassador. And then, this ambassador, let them know that they're going to be welcoming the guests and closing out the Point of Entry, using this how to open and close, which I'm going to show you in a minute. And they will complete their commitment within three months, and they can re-up if they want for another term, or they can get involved in other ways.

We have one group that we work with that has...I think they have about 50 ambassadors that have been successful ambassadors, and then they have about 75 others that are in the process of becoming an ambassador. They don't even let them be calling themselves an ambassador. In fact, they have a pinning ceremony and all. They don't even let them be an ambassador until they've actually had at least 10 people come to the Points of Entry. So, if they have a Point of Entry and they only get eight there, they don't get to down. They got to have another one [Laughs] until they get at least 10. And then, so they've got 50 ambassadors, or maybe it's a little more than that now, and another 75 that are in the process.

So, you might think, "Well, what do they do with the first 50 once they've done their thing?" Well, some of them will want to do it again. Some of them will want to be an ambassador a second time, a third time. Some people are really gung-ho about this, and they have a large network, and they'll do it for a long time. But most people, once is enough. And then, you want to find ways to keep them involved. Many, in this case of this organization I'm talking about, those people truly are ambassadors now out in the community for the organization. Many of them are on other committees, they're on...of the organization, they're on...a number of them have come on the board. They're out there speaking about the organization in a really positive way.

And let me just say, the word ambassador offends some people. A lot of people are kind of intimidated by it, or they just don't like it. That's fine, don't use it. Pick another word. "Friends of," or "Supporters," "A community of people that we..." or "Our dear friends." Whatever you want to call it. You can even give it a very specific name. But we don't require you to call them ambassadors, that's just our generic name for it at Benevon, so you understand the concept of it. Okay.

Now, how to open and close your Point of Entry. So, opening your Point of Entry...and, actually, as I'm going through this, let me just comment that we will be having some time for Q&A at the end, so do start...I haven't been watching, but if you haven't already, do start typing in some of your questions, because I'll be happy to answer them when we're finished. You hopefully are having some good questions come up now we can get some nice dialogue going at the end. So, how to open and close your Point of Entry. This is in the book, page 122. And this is... We recommend that our groups actually print this out on a little card and laminate it and give it to the ambassador at the Point of Entry, because I've been to a number of these where the ambassador thinks that they're doing this right, but they don't say this, they just kind of hurry through it, they're nervous, or they forget some of the points.

You've really got to cover all of these points. "Thank you all for coming, this is my name, I am what we call an ambassador," or whatever you're going to call them at that point, "Which means I've agreed to help the organization spread the word by inviting people just like you. Our goal is to give you a firsthand experience, educate and inspire you. As we go through the next hour, please be thinking of any other individuals or groups that might want to learn about this. When you get a call from Susan in the next couple of days to get your feedback, I hope you'll consider becoming an ambassador." And usually, people will also say, "This is the very best way you can help us. The very best way you can help us is by spreading the word." Okay?

So, you want to make that known right at the beginning. And then, the ambassadors should share their own personal story about why they work with the organization. If there are 10 guests or fewer, they should ask people to go around the table, and briefly say their name and connection. This is really helpful, doing that kind of ice-breaker exercise, not only for the guests, but for you and this Susan person who's making the follow-up calls, because they start to get a sense of, "Oh, you know, her...this..." I was thinking of the hospital we work with, where they found that, you know, one man said, you know, this was where his wife came for her cancer treatment, and another person said, you know, "My three children were born here at the hospital." And another one said, "I'm new to town, I've never even been in here, but I just wanted to find out where it was in case I need it.

So, you have kind of an ice breaker line then when you are making the follow-up calls that's very helpful, and it connects people to the mission. Even if you're the ambassador and you think that you know all...the reason, you think you know your guests pretty well, you will be surprised what comes out in just those really brief introductions. A lot of people worry that that will take too long. You only have one hour for the Point of Entry, but we never find people really run over, that's why we say, "If it's 10 guests or fewer." And then, the ambassador thanks everyone and turns the program over to the Visionary Leader, okay?

And at the end, they've got to come back, bring out that laminated card again, and now say, "We're going to end now to be sure we honor our one-hour time commitment, thanks for joining us, we really appreciate you taking your time, Susan will be calling each of you in the next few days to get your feedback." Please take her call. If you are inspired, the best way you can help is by telling others and inviting them to a similar event. If you'd like to host a session like this for your own friends, let her know that when she calls you, I hope you will consider becoming an ambassador. Thanks, and have a great day."

So, there you go, how to open, how to close. Now, the last piece of this is, you know, how are you really going to invite your guests? You know, what are you going to tell them? And I think I said that pretty clearly at the beginning, but there are sections in the books that talk about this, how...the kind of wording to use. What we don't want is a stale invitation, you know, "Oh, I signed up for this thing, I said I would do this thing, I got called an ambassador, I got to get 10 people, you know, you've...I've helped you in the past, please come help me, the time probably doesn't work for you, but can you make it work this one time? I need more people."

That kind of an invitation is not very inviting, [Laughs] right? As contrasted with saying, you know, "I'm so excited. You know, John, you know how excited I am about this organization, I've talked to you about it many times, I'm really...and they've got a great new program for working with children, and something that I'm really passionate about and I think you would enjoy. They started offering these little tours. And I've agreed to help them by hosting a private one, and I'm hoping that you can come and see what this is all about. And, you know, invite others if you'd like, but I'd really love for you to come, so that you can see what this is about, and perhaps you'll be able to think of other people who should know about this."

So, you want to get that enthusiasm in there. You want to get that enthusiasm in there, you want to get people enthusiastic about it, and you want them to...even if they're coming strictly out of guilt and obligation, because you are the ambassador, and you're saying, you know, "This is what we do for each other in the book club," that is an acceptable reason. That is okay for a reason to invite people to a Point of Entry. But it is not okay after that, because as I mentioned in the model, the second step here, in the

follow-up call, we're going to do the heavy bless and release. 50% of the people will be blessed and released.

So, in case you're thinking, "Okay, this is just some new way to do the bait and switch by the time we get down to the asking here, pretty much I know if I'm going to invite somebody to a Point of Entry, they're going to be asked for money." That is not the case. Really, only a small percentage of them will be, if they come to the Ask Event. Now, I didn't go back and talk about that we do the one on one asking also. A lot of our groups, well, in fact, all of them that we teach and coach at our two-day training, will be taught to go out and ask for a Leadership/Challenge Gift, so that's a gift from one donor or a small group of donors that inspire...that's announced right at the Ask Event, right before the pitch, as a way to inspire additional giving.

And then, let's just say that some of the people who came to your Point of Entry back up here are out of town on the day of the Ask Event, but you've done the whole dating process with them, and they're really ready to give, they just were out of town that day. Those people, you can go and ask one on one also, and show them the pledge card and say, "We're so sorry we missed you. We'd love to have you become a founding member of our Giving Society at one of these levels. Does that make sense to you? Which level would you like?" So, you want to just be using the model throughout to build long-term major donors, but only of those people who have been to Points of Entry. Point of Entry is the driver. If you're only going to do one step in this model, you want to do the Point of Entry.

Okay, so, let me talk a little bit about the resources available, and then we'll open up for questions. So, first I mentioned the books, which are key, and they're right there in the bookstore. I can tell you the prices. Let me just think about this a little bit. This one is \$79.95. Oh, sorry, this one is... I think this one is \$49.95. I think this one is \$49.95. Sorry, I should know the prices. This one is \$79.95. And then, this book is the one I've been talking about. If you're only going to get one book, this is the one to get, because it's the guide to doing it right. And then, this is missionizing your events, which is wonderful, for those of you who put on a lot of events, I go into great detail there on how to take each event and convert it...move it into a systematic process, so that it will forward what you're trying to accomplish with this model, this deeper engagement. And even how to rotate the events to different times of the year to allow for the Benevon model to come in and do the Points of Entry, and the Ask Event. And eventually, perhaps how to stop doing some of those events, so that you're able to free up more time to focus on the deeper donor cultivation and major gifts.

And then, this is the... This is actually \$19.95, but it's free right on our website. It is a video, a DVD, or our free 55-minute video. It's right there on our website. And I would encourage you, if you've got other people after today who are interested in Benevon and you want to explain it to them, don't try, just send them to the...just go to the website and watch the 55-minute video. But you can buy... You don't need to buy this at all, this video right here, but a lot of people want it, so we sell it all in a package deal. The whole thing is about 20%...I think it's 15% or 20% of its \$129.95-ish...I can't remember, kind of in the vein, but it's a good buy. And you may want to get the whole set. It's only available on our website. We do not sell it on Amazon, so you've got to get it at Benevon.

We have videos. I mentioned the 55-minute video, there's also a 10-minute video, and there's another really great video called Inside a Benevon Workshop, which talks about...which interviews people as they come out, right out, of our workshop, and it actually takes you into the workshop room to see a little more of what goes on. Some of you know that we work with Bloomerang, a fantastic database for nonprofits that we really, really like. We have a private version of it called Bloomering for Benevon, so if

you decide that you want to use the Benevon model, either on your own, or come to our classes, which I'm going to tell you about here in a minute, you will probably...you will definitely need some type of database. You can see all the things that you need to track.

But you may find that you would like to try, or learn more about Bloomerang for Benevon. It's web-based, inexpensive, and very easy to use. I mean, if you can use it on your phone, it's kind of like...if you can use it...I tell people, "If you can use a cell phone, you can use Bloomerang." And the Bloomerang for Benevon is not expensive at all, and really does have all the processes built in. It's got the Point of Entry, it's got the follow-up, it's got the whole model kind of built into the...right into the software, so it's really convenient for tracking and producing the data afterwards, also. Then, a live introductory session, so, if you liked this today, we do live sessions. This is just an example of some of the cities we're going to be in in the next few months. Check on our website, Benevon.com. There are a lot of things on there. We do get around. These are little three, two-hours sessions that we do all over the country about Benevon, and we also speak at a lot of conferences so if you would ever like us to do a conference for you or a webinar for you. If you have a national group or a statewide group, and you would like a webinar speaker, let us know that. Then here comes our conference calls and webinars. Like today, we've got a whole series of webinars that I mentioned and here's the next one called, The Five Key Metrics for Getting It Right on September 26th, and then after that we're going to be repeating this webinar, Engage Your Community As Ambassadors and Donors on October 17th. Then we are doing a private webinar. Actually, not private, it's open to the public but private in that it is hosted by Boomerang as opposed to hosted by Benevon about the same kind of topic, Engaging Your Community As Ambassadors and Donors on August 31st. These are all on our website and you would need to register for any of them. They are free. We really are trying to get the material out there. We want people to think differently about individually fundraising and not be scared of it, and not go right out and ask for money, but actually think of it as community engagement and deep donor engagement.

Then we have our workshops. The workshop calendar right here, as you can see, the workshops are two-day workshops where you come with a team of seven to ten people. I kind of specified there, "the team." They have the visionary leader who is the CEO, the Team Leader who is usually the Development Director, maybe one other staff member of your choosing, and then two Board Members minimum, and the rest of the people are either Board or volunteers. The tuition covers seven people, but you can pay a little bit extra for the meals and materials and get up to ten people, for seven to ten people. We spend a lot of time with groups figuring out who the right team members are. Please, if you want to come to our workshops don't just go online and register. We actually want to talk to you first to be sure you are coming to the right workshop time of year. We have all kinds of things we've learned about. Just for example, all of these workshops that you can see through here are all in the later part of 2017 and these are all groups that will be putting on their Ask Event in the Fall of 2018, because, you see, you need almost a full year of Points of Entry to ramp up to put on a productive Ask Event to meet those metrics that I showed you. Then the groups coming here will be putting on their Ask Event in the Spring of 2019. This will lead them to a 2019 Ask Event. That's just an example of the kind of thing we would want to talk to you about first.

We don't want you to come off-season, as we like to say. We also want to look at what are all those other events you are already doing. We don't want to cause a problem for you by having you put on an ask even the same month as your other gala. Hopefully, over time, some of those other more labor-intensive events can fade away but we certainly don't recommend that you change anything the first year until you've proven that this can really work for you. So you come to the two-day workshop, you sit at your own round table in a room of ten or twelve non-profits, different kinds of non-profits, so you've

got to be willing to be in a room with other non-profits, even if their mission is very different than yours. But it is kind of a group experience, but also a very private experience. You are kind of focused on your own team. You are sitting at one of those round tables in a hotel ballroom. That's why we limit it to 10 people because that's about as many as you can fit around one of those round tables. The instructor who is standing at the front of the room gives you...every person has a three-ring binder about 120 to 125 pages filled with scripts, templates, formulas that we customize for you.

So, the instructor will teach one segment. Like they might teach, how do you define your buckets and how do you craft your buckets, and then they'll pause and let you work at your table with your group. Then the coach will come and sit with you from time to time during those different work times and insure that you are on track, that you are coming up with a plan. We kind of layer it on like that for two full days. It's quite rigorous and intense, but very fun. It goes by really, really fast. People always comment, I can't believe it went by that fast. I thought I was going to be bored and I was kind of nervous to sit that long, but you are really engaged because it is your mission. These are people that oftentimes team members don't even know each other, but they are very excited because they all care about the same mission. So you walk out of there with a timeline, a plan and a coach. You now know your coach, and your coach stays with you by telephone over the next year. You get about eight coaching calls spread out between the time you come to the workshop, and the time of your Ask Event. That is plenty of coaching to insure that you are successful.

What is our definition of success? The average group raises \$200,000 the first year in cash and pledges, so it's now all cash. And by the third year, groups that stay with us in our longer-term program have raised by now a million and a half dollars, and by the fifth year, they've raised three and a half million dollars. That's an average and that includes the pledges. So it's not all cash. That includes pledges going forward. Looking forward now, those are the dates of the workshops. I think that gives you a sense of all of the resources that we have. I'll leave that slide up for a bit. The tuition for the workshop, I neglected to say, this year is \$18,000 and next year it's going up to \$19,000 for the team of seven. The additional people per person, the eighth, ninth and tenth persons will be \$250 each to cover their meals and materials. We do recommend you bring a good size team because everyone on your team must agree to four things if they want to be on the team. Number one, that they will attend the two-day workshop and participate fully; number two, that they will serve as an ambassador in the first three months of coming back from the workshop; number three, that they will attend a monthly team meeting in your office; and number four, that they will participating in all the coaching calls which happen about every eight to ten weeks. So not everybody is going to want to sign on. They have to agree to be on the team for one year. Not everybody is going to want to do that, so some of those folks who don't want to be on the full team...like for example, you might have some Board Members that might say, "I'm interested in this but I cannot go to Seattle or wherever it is those dates, or I can't take that kind of time." They could, if they are really interested, serve as an ambassador and just help you by putting on one tour, one posting, one point of entry about when you get back, like that.

So lots of roles for people. We don't have any requirements. There is no forcing everybody to do anything. The model is incredibly permission-based. So after today, if you are interested in anything more with Benevon, two things. First, there is going to be a little pop-up survey when you hang up the phone from this webinar, and it asks you just, I think, three or four little yes or no questions. It will take under one minute to do. And for those of you who finish the survey, you will be receiving a white paper and I'm very excited, called Recruiting Ambassadors, a white paper that I've written for you. I hope that you will answer the survey, and read and enjoy the white paper. Then tomorrow, later today or tomorrow, you will be getting another email with all the resources that I've shown you here with the

various links. Do let us know. Do fill out that survey when it pops up so we'll have a sense when you would like anymore follow-up after today. That's the only way you can let us know that, if you put that in the survey. Just say, you know, I would like somebody to call me about this or that.

Okay. I think that covers it more than enough. Why don't I pause right there and I will ask if there are any questions. Do we have any questions, Zoë?

Zoë: Yes, we do, Terry. Kathy asked, for one on one Asks, is there generally a best time that you have found to Ask, for example, after six months, after four interactions, etc.?

Terry: Great questions, Kathy. So assuming that one of the interactions is a Point of Entry, and not just that they came to a golf tournament three years ago. But assuming that one of the contacts, the initial one hopefully, is the Point of Entry and that you've had two or three more dates with them, usually that's about enough. I would say maybe three or four contacts. People by then are kind of wondering why haven't you asked them for any money, but we don't have a strict rule, Kathy. We don't have a strict rule. You kind of know. We teach in the upper levels of our workshops a lot more about major gifts in Cultivation, and one of the things we teach is that again, there is not any hard and fast rule about when that will happen, but as you have these ongoing contacts with people, just as you develop friendship relationships with people, you kind of get to know them a little bit better, you get to learn their style, if they like things fast, they like it slow. How often do they want contact. Are they people that text or do they prefer the phone. Do they use email. How do you communicate with them, and then you learn about their family and their work.

Before you know it, you kind of have a sense of, you know, this would not be a really good time to be asking them or this would be the right time to be asking them. You even get a sense of how much to ask for. So it's very customized. If you think about a big university, they are not just inviting you to galas every week, every month or twice a year. They are really customizing their Cultivation and what they are asking of you, based on what they know about you and what they hope to know about you. They spend a lot of time getting to know you. This really is a getting to know you model, and we have many groups that have done so well with this that they've built so much sustainable funding, even by the end of using the model. It takes them honestly about seven to twelve years, we've found. Like we said at the beginning, we've been doing this for over 20 years now. We've seen many of the groups bring the model to scale, so to speak and that takes seven to twelve years. Out of doing that, they have a significant group of major donors. At the school where I started this, we had our first Ask Event, and you saw from that chart we had about 127 new donors in our Giving Society. By the time I left the school we had about 200 donors in the Giving Society and the woman who took over after me as the second Development Director grew that to over 500 donors by using this process. She had no training in fundraising at all or non-profit, and she just was so scared she stuck to the model, she followed it to a T and that's when I knew there really was a system here that even a new person, if they were passionate and diligent, and faithful to this process could be very successful. She was at the school for about here years and ended up, by the time she left there was over 500 donors in the Giving Society in those top three levels of the Pledge Card that I showed you all. That was when the Board wondered how much money they would need to raise in an endowment. So the interest along off the corpus of the endowment would be enough to cover our annual operating gap, which as you saw was about \$600,000. They decided we would need a \$15 million endowment which we were able to complete by the end of the seventh year.

So you really want to think as you embark on the Benevon model what would Sustainable Funding look like for us. Really, what would it take to make sure this place is going to stick around. Many of you have Senior Leadership that are retiring soon and you're wondering how are we going to keep this going. They have all the relationships. So we find we stay with groups long-term and we help them to transition those relationships, and we help them to find Board Members who are really deeply passionate. As I said at the beginning, this is a model for deep, community engagement. Really getting the community to understand what you do, and if you do that well the money will follow, Kathy. Okay, next question.

Zoë: All right. Meghan asked, right now running the annual giving campaign takes most of my time in the Fall and into the New Year some. Do you have any suggestions for how to add Benevon? Do some organization stop doing Annual Giving Campaigns?

Terry: Good question, Meghan. Yes, they do. The answer is, it depends. I'm not going to be able to talk to you right now on this webinar, but just the kinds of questions I would ask would be, how many donors do you have in your annual campaign, what time of year? I'm assuming you do it at the end of the year, and what dollar amounts do you ask them for. Our rule of thumb usually at Benevon is that once a donor has joined the Giving Society and made a five-year pledge of at least \$1,000, not a five-year pledge for \$100. Once they've done at least \$1,000 pledge for five years, we recommend that you take them off of all of your direct mail and year-end mailing. They may still send in money to you extra, but we want to treat them in a special way so we recommend that you stop that. If you ever wanted to talk more about it, Meghan, I don't know how large your organization is or how large that campaign is, but we would look at is it really productive. A lot of groups we find spend a lot of time on that year-end mailing and it doesn't really yield much when you contrast it with what you could achieve by having some of those same Board Members, because often it is the Board Members writing letters to their friends or they give you a list and the donors are giving just out of guilt or obligation to their friend that's on the Board which is not sustainable. So we would have you ask those Board Members be Ambassadors and host Points of Entry, so rather than asking their friends for money with a letter right off the bat, they would be inviting them to come and learn about the organization. Then following the model, if they were interested we could definitely ask them to give money down the road at the Ask Event. So in our ideal scenario, Meghan, every single person who gives you money knows what you are really about and really is passionate. Now I'm not saying that the people who give through the mail are not that way, but it can be a little bit arm's length. Zoë, any more questions?

Zoë: Yes, we have a lot of questions.

Terry: Okay. Keep going.

Zoë: The next one is from Tina. Do you still recommend two Points of Entry with ten to fifteen individuals in smaller communities where there are a limited number of people to draw from?

Terry: Yes, Tina. Hi. I don't know the size of your community, but we've done this in really tiny communities and frankly, sometimes they do better than the people in the big communities because there is a different kind of a bond and a connection. Absolutely. You can do anything you want with the model. If you want to follow it, yes, do. If you want to do it on what I call a Benevon Light Version, you could just do one Point of Entry per month. I wouldn't say that is at all a function of the community. I would say it's more a function of the Ambassadors. We have people that put out one Point of Entry with ten people and when they called them afterwards to follow-up, all ten of them want to become Ambassadors. So if you set it up properly and by that I don't mean manipulate people. I mean if you

really explain to them what it is and really share passionately what you do. The same goes with smaller kind of start-up organizations. I was talking to a woman earlier today who started a non-profit and it just got started in March, and she said, “You know, how do I get the word out about what I’m doing?” It’s an amazing program for people who were formerly incarcerated, and she said, “Well I only have one staff member. What are we going to do?” I said, “Well, you can do the Points of Entry in people’s homes and tell them. You can come up with your three buckets, you can come up with the stories, and a lot of times in that example people are super passionate.”

The main problem with doing Points of Entry in people’s homes and this isn’t what you’ve been asking for Tina, but I’ll just say it, is that it’s very tempting for people to want to give money when they are in someone’s home. They feel like out of obligation or a way to repay for the wine and cheese, or whatever, but they should at least make a little gift because it’s a friend. It is very tricky to do them in the homes, unless you make it crystal clear to people that this is strictly informational, they will not be asked for money, and you are not even accepting any money there, that this really is for the purpose of explaining what you do and hopefully having them think of other people they would want to invite.

If you think about it, we had 1,100 people in our school take the tour in the first five months. If you had 1,100 people learn about your organization regardless of what size your community is, you hardly even have to do any kind of an Ask Event. Just that many people knowing about you, the word is going to be out. Good things are going to happen between the Point of Entry up here and the Ask Event down here. A lot of things can happen where especially in this dating process, people will give you their old computers, they might say I want you to come out and meet this person or that person. You could even get money here that comes from peripheral sources, but a lot can happen just in this process. You don’t even have to have an Ask Event at all. Okay, I went off a little bit. Tina, sorry about that but good question. Okay, Zoë, what’s next?

Zoë: Next is from, Michael. How do you track multiple year gifts made by one individual to know when one of their pledges is about to or has expired?

Terry: Good one, Michael. Sounds like you are a self-implementer because that’s a question asked by somebody who gets it. A couple of points to make. Usually the short is you track each pledge separately so they are carried separately on your books. You can follow it that way and with a good data tracking system it will inform you of that year-by-year. In practice, what I found at the school, we had a lot of people who added new pledges every year or they would say let me add on another year and the next pledge they go, why don’t we raise that from \$1,000 to \$5,000 and they do that in the third year. It was kind of a mess so we had to invoice them. Even though we don’t recommend invoicing at all, at Benevon, because the only way you are going to get the pledges paid off is if you talk to the donors and you have a relationship with them. The Pledge Pay-Off Rate should be 90% or more paying it off and that’s only because you are in contact with them. If you just rely on mailing to them and waiting five years until their pledge is paid off, they are probably not going to renew their pledge.

That’s why, by the second year in our model, I didn’t really show you all of this when I walked through the model, but by six months after my first Ask Event at the school, we did a Capital Campaign. We had to raise \$3.2 million for a new building and the only donors we had were those 127 that you saw on that slide. How were we going to do that? We had to go back the same people that had just made pledges and ask them to come back to what we call Points of Re-Entry, little evening Points of Entry focused on capital and then we asked them one-on-one afterwards. We showed them the architect’s drawing, gave them the whole plan for this exciting new building that we desperately needed, and then we did one-on-

one follow-up. We raised \$3.2 million from 18 of those same donors who had just given at the Ask Event. So you do not want to be thinking that you've got to wait five years before you ask people a second time. The Giving Society, these five-year pledges that people make to you down here, these are people who in their own way are telling you, I love your mission. I'm with you and the family. I know that instead of giving you \$1,000 one year at a time, because I could do that and there is that option on the bottom form of the pledge card. You can give X amount of money. You give \$1,000 a year, one year at a time, but by virtue of the fact that I checked the top box where I did it for five years, I'm telling you that I know I don't have to make a five-year pledge, I want to. I believe that much in what you are doing. Sign me up.

So, that's the magic of the model. We take that as permission. You have permission right there to be in touch with that person way sooner than once a year, which is a long answer, Michael, to your question. Okay, Zoë, do we have one more? I think we have another minute or two and see if we can squeeze in one more quick answer to a question.

Zoë: Vicki asked, how do we get Board Members to re-engage?

Terry: Good one, Vicki. I don't know the type of organization you have. I don't know the situation of your Board, but using the model, the concepts and the model, what I would recommend is you put together a team, like I said, figure out who are the right people to be on your team, and it would only include two Board Members, so you don't want to roll into the Board Meeting and say, "We're doing this new thing, everybody has got to do this or that." In any event, never. That will only backfire. If you get a great team and either try it on your own, or come to one of our classes, what we'll find is you come back from the workshop or after you've designed the Point of Entry, and you put on a couple of what we call kick the tires Points of Entry for close people, close-end people that you can make a lot of mistakes with and they won't be too critical, but they will give you good feedback.

After you've refined it, and turned out a great Point of Entry, and worked out all the kinks, they you have a Point of Entry for the Board, the whole Board. You usually do it right appended onto a board meeting, an evening meeting or morning meeting, whenever you have them. After that you follow-up with every one of the Board Members, the same as you would with any other guest at a Point of Entry and you will find that many of the Board Members will say, this is why I got involved in the first place. I finally feel like we are telling the story properly, and yes, I have a work group, I have a school group, this or that group. I would love to host one of these. Those are the Board Members who are very organically going to be getting back involved. That's what you want. You want people, Vicki, who are very organically reconnected and some of that, it's not everyone, some of the Board Members shouldn't be on the board anymore. Maybe you've lost them, it's been too long, you've grown apart, but many of them will come back very organically by using the model without pressuring them. There is no requirement that Board Members have to do anything in this model and that will kind of ironically, paradoxically get them even more engaged.

I think we have come to the end of our time. I just want to thank everyone for the time today and remind you that there will be a little pop-up survey coming up when you hang up the phone. Please fill it out and then you'll get the white paper. Tomorrow you will get an email with all of the resources that I mentioned and the links in it. Do join us for our next webinar which is on September 26th on the Five Key Metrics of the Benevon Model.

Thanks everyone. Have a great day. Bye-bye.