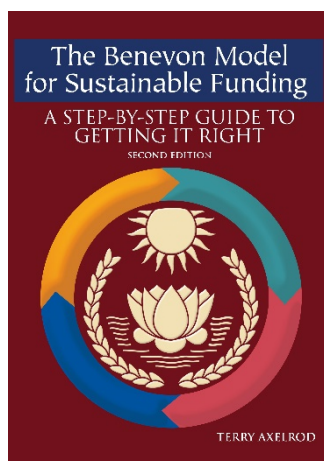


# Engaging Your Board

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## Engaging Your Board

*Excerpted from [The Benevon Model for Sustainable Funding, A Step-by-Step Guide to Getting it Right, Second Edition](#)*

Most groups tell us there is a direct correlation between their success with implementing the Benevon Model and the level of engagement of their board members. In other words, as the Benevon Model takes hold and grows roots in the daily life of your organization, you should naturally find your current and former board members becoming more involved in the work of the board and the organization. Other long-serving board members may gracefully step off the board to make room for new people who have been introduced to your organization at a Point of Entry Event or an Ask Event and want to become more involved—at the board level.

Much has been written and said about the roles for board members today—their fiduciary responsibilities and effective models for board governance. Clearly, the board's first role is to govern the organization. Yet that is often not how it feels to board members. While they may have been recruited for their particular area of expertise, influence, or contacts, board members know that sooner or later they will be asked to do the dreaded thing the organization needs most: fundraising. Most often this looks like buying or selling tickets to the organization's fundraising social events and soliciting their friends and colleagues for money, either by letter or in person.

The typical scenario looks something like this:

The nominating committee of your board starts by identifying the categories of expertise needing to be filled on the board. For example, you may be looking for someone with experience in human resources, real estate, finance, public relations, or fundraising. Each potential board member is checked out thoroughly, courted, and then invited to join the board. Your organization is thrilled when they accept.

Each new board member reads over the written agreement listing what is expected of them. You even make sure they see all the fine print about their fundraising responsibilities. Perhaps your organization has a minimum giving expectation for the board, or a “give or get” policy. Whatever your expectations, you do your best to communicate them clearly to each new board member before they agree to serve.

Now, as your fresh and eager new recruit arrives at one of her first board meetings, ready to fill the “CPA slot,” for example, one of the main agenda items is, of course, fundraising. It just happens to be the time of year for the big annual banquet, golf tournament, or fund drive. Before she has even been oriented to the basics of being on the board, the new member is being asked to do the part she dreaded most. Yes, she did know this was coming eventually, and she did agree to help. So she takes a deep breath and scans her address book for her five closest friends or colleagues who cannot refuse her. After all, she has helped them in similar times of need.

Think for a moment about how it feels for her friends to be on the receiving end of one of those Asks. In most cases, those friends cannot say no. Their relationship with your board member, whether professional or personal, would make it very awkward to refuse. In their minds, their contribution is more akin to a business expense.

The times I have been “strong-armed” by my friends on other boards, I have had to say yes. But as soon as my friend goes off that board, I stop giving to that organization. It is not because it was a bad organization. On the contrary, they were almost certainly doing very good work. Had they taken the time to educate and cultivate me personally, I could have become a lifelong supporter in my own right. But in their minds, I was my friend’s contact so they left me alone, not wanting to intrude.

In terms of their love of fundraising, a random sample of board members will pretty much mirror the larger population. In other words, fundraising is just not everyone’s favorite activity. The same folks who may be brilliant at strategic planning, finance, or human resources may not feel they have the knack for fundraising. Remember, you did not initially recruit all of them for their fundraising expertise. That would be akin to asking all board members to be responsible for reviewing the annual audit in detail or securing the next piece of real estate for the organization.

On the other hand, there is a portion of the population that actually likes to ask others for money, especially when they are asking on behalf of an organization they truly believe in. Those are the board members you intentionally recruited to fill the fundraising slots. You put them on the development committee. At the proper point in the fundraising/cultivation cycle, these board members will be of great help in asking for money, but not until potential donors have attended a Point of Entry Event, received a Follow-Up Call, and been cultivated sufficiently to be ready to be asked.

As most of us have learned the hard way, *pressuring board members to do fundraising does not work*. Even if they say they will make those three calls to ask people for money, many never seem to get around to it. For some, this pressure leads to poor attendance at meetings. Eventually they withdraw or resign from the board feeling guilty, frustrated, or resentful.

### **Board Envy: The Ideal Fundraising Board**

Most nonprofits aspire to have their board become a “fundraising board,” either because they think that is what an ideal board should be, or because they think it would handle their fundraising needs forever. They berate themselves for not having this ideal fundraising board. I refer to this as “board envy,” and it is not rooted in any reality I have ever seen.

When you pull back the curtain from those well-established organizations with “fundraising boards” that are the envy of every other group, you will find a team of dedicated, hard-working staff who coordinate the process of strategically cultivating each

donor and engaging volunteer board members at every step of the way, including the ultimate Ask.

The fantasy of the magical fundraising board that will do all the work and raise all the money is just that: a fantasy. Those organizations with “ideal” fundraising boards have a systematic plan for how they grow and cultivate relationships with donors. While they involve their board members strategically in the cultivation and asking process, they certainly don’t rely on their board members to save the day.

We work with many groups that have well-established fundraising programs, including groups that are already raising many millions of dollars each year before they come to our workshops. They often tell us they still do not feel they have a system for keeping their board members engaged.

They experience board burnout and turnover, just like the small and midsized organizations do. They use our model as a mission-centered strategy for ongoing donor—and board—engagement.

If you are truly committed to leaving a legacy of self-sustaining funding, there is no better place to start than with your board. Rather than distracting your focus and wasting time comparing your board to others, get to work on specific strategies for keeping your board engaged.

### **The Benevon Golden Rule**

Above all, treat your board members as if they are your most cherished major donors. That is the Benevon Golden Rule. It sounds simple, yet when you scan through the list of your board members one by one—if you tell the truth—there may be a few members whom you’ve already written off in your mind, either because they are annoying or troublesome to you in some way, or because you have predetermined that they do not have the capacity to become a major donor. That is a violation of the Benevon Golden Rule.

Compare that to how you think about your list of major donors, at whatever dollar level you define as “major.” Think of all the special things you do or try to do for those donors—special events, letters, calls, and meetings. Think about the respect and humility you bring to each interaction, regardless of that donor’s quirky personality. You have a great deal of tolerance for your major donors, knowing their capacity to give.

Why, then, would you treat your board members differently? These are people who are giving their own time to do something you invited them to do, to serve on your board. That is a great gift unto itself. Furthermore, the statistics show that 90% of people who volunteer in America also give money.

And here, in your board members, you have the most dedicated volunteers. Why not assume they will become your most passionate major donors? Even if they do not have the capacity to give a large gift now, odds are they will be making charitable gifts at the end of

their lives to one or more organizations. Where else would they rather give that money than to an organization that has treated them well throughout the years—an organization whose work they know and love and perhaps has benefited them or their families personally?

What systems do you have for cultivating and engaging your major donors? If you have adopted the Benevon Model, you will have a plan for talking to them several times a year, personally and face-to-face. You will invite them to special mission-focused Free Feel-Good Cultivation Events each year. You will continue to deepen your relationship with them, very intentionally, finding out at every opportunity how else they might like to become involved, what more they need from the organization, and who else they might want to introduce.

These are the same sorts of systems you will want to put in place for your board members.

### **Three Roles for Board Members**

The fastest route to sanity and satisfaction is to accept the 20-60-20 rule when it comes to fundraising and your board members. That is, 20% of the board will enjoy being involved in fundraising, 60% will be neutral about it, and the remaining 20% will want nothing to do with it.

Here are three easy ways for every board member to participate in the fundraising process, without ever having to ask anyone for money themselves:

- *Serve as Ambassadors by hosting a Point of Entry Event for 10 or more of their friends, business colleagues, or civic group.* If your board members did nothing more than this, they would be making an enormous contribution to the future of your organization. Short of that, they can agree to invite people to join them at one of your organization's public Point of Entry Events.
- *Thank donors for gifts.* Ask your board members to telephone recent, happy individual donors just to thank them. Not all board members will want to do this, but once a few of them report at the next board meeting on how rewarding the experience was, others may offer to jump in. A personal thank-you call from a board member makes a lasting impression.
- *Give money themselves.* You need to be able to tell your community that 100% of your board members give money personally to your organization, regardless of the amount. Many board members will make their gift at the annual Ask Event. Others may choose to be part of a pooled Leadership or Challenge Gift. We do not recommend setting a minimum gift expectation for board members. If you cultivate and ask each board member individually for their gift, you will be treating each board member as if they will become your most cherished major donor, thereby abiding by the Benevon Golden Rule.

## **Top Ten Checklist: Involving Your Board in the Fundraising Process**

How does your board stack up? Here is a series of questions that will get to the truth about how you are doing at involving your board. Write down your answers to each question below.

1. When it comes to fundraising, what are your biggest concerns about your board? What more would you like your board members to be doing? What would it take for your board to more closely resemble your image of the “ideal” board?
2. What percentage of your total board members would you rate as truly passionate about your mission? Do the math. The sooner you tell the truth about this percentage, the sooner you can get to work.
3. 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 of the model or nod their heads pleasantly when you discuss Point of Entry Events and the Ask Event)? Rather, what percentage truly understand the power of the Benevon Model to build long-term sustainable funding, which is something most board members would love to leave as a legacy?
4. What percentage of total board members have attended your organization’s Point of Entry Event? Even if board members think they know everything there is to know about your organization, they will learn something new and personally experience the power of your mission. Tell them in advance that you need their advice and feedback.
5. What percentage of your board members have invited others to attend Point of Entry Events? Some groups make this a standard part of board participation, going so far as to have board members sign an agreement to participate at a certain level, for instance, to attend at least one Point of Entry Event per year, or to have a minimum number of guests throughout the year, or to become an official Ambassador, filling one Point of Entry with at least 10 guests.
6. What percentage of your board members have been involved in thanking donors? What have they said about it afterwards? Do you give them an opportunity to share these experiences at board meetings?
7. What percentage of your board members give money to the organization, personally? Your goal here should be 100% participation with no minimum dollar requirement.
8. Have you completed a Cultivation Interview with each board member once a year? These simple Cultivation Interview Questions (Chapter 9) are very powerful. If your CEO and board chair were to do an annual Cultivation Interview with each of your board members,

that would send a message that each board member is very important to your organization. Cultivation Interviews give your board members an opportunity to talk to you and, even more importantly, give you an opportunity to listen to them, which again sends the message that you value them. Furthermore, if you pay close attention to what they are telling you in these annual interviews, you will see what has changed in their life circumstances and priorities in the past year, what lights them up most about your work, and how you can involve them in precisely those areas, just as you would cultivate a major donor.

9. What is your plan to increase or retread your board members' passion? This new level of engagement for each board member isn't going to happen automatically. It takes someone to drive it, step by step. Just as you would develop a cultivation plan for each major donor, you need a similar step-by-step plan for cultivating each board member. This will be a series of personalized contacts, each focusing on the board member's particular area of interest, which you will know well. Each subsequent contact is driven by the board member's request during the prior contact.

10. Do you have an annual board fundraising retreat where each board member signs an annual board agreement, outlining the options and requirements for participation?

### **Annual Board Fundraising Retreat**

To keep the Benevon Model fresh as board members come and go, I recommend you hold an annual board fundraising retreat. Here is the proposed 90-minute agenda for this retreat, which can be used as the agenda for a stand-alone event, a special board meeting, or as part of an all-day retreat that may include other topics.

Let's walk through this agenda step by step, because it includes several critical elements that can be used at other times of the year as well.

#### AGENDA

##### WELCOME AND INTRODUCTIONS (5 minutes)

##### PASSION RETREAD EXERCISE (15 minutes)

After the welcome and introductions, which should take no longer than five minutes, the first item on the agenda sets the tone. The Passion Retread exercise, which I described in Chapter 2, is easy to do, non-threatening, and guaranteed to connect people to their passion for your work—and to each other—very quickly. That's why we put it first on the agenda. Once people are in touch with why they are giving their time to your group, they have a great deal more compassion for one another and can focus on the work at hand.

Here's how it works. Have your facilitator, board chair, or executive director ask people to think about this question: "What is so special about the work of this organization that makes you want to give your time to it?" Then go around the group, person by person, and ask each board member to share their response. You'll find that some of the stories are

very personal and moving, while others may be touching and amusing. As the stories spill out, members of the group will rediscover their connection to the organization. At the same time, participants will gain a deeper respect for and connection to each other, even the more challenging members.

In the end, all who participate in this exercise will have new energy and enthusiasm for telling the story of the organization to the community. They will be reminded of just how important the work of this organization is and why they want to serve on the board.

#### LEGACY GOALS (5 minutes)

Next, the board chair or another board member on your team shares the short-term and long-term sustainable funding goals your team has established with the rest of the board. How much money are you aiming to raise, by when, and what is the impact that funding will have on fulfilling your organization's mission and on the community? We will discuss this in more detail in Chapter 6.

#### CUSTOMIZED BENEVO MODEL DIAGRAM (10 minutes)

Walk the board through the basics of the Benevon Model. Groups often have this part of the agenda presented by a board member or former board member who has served on their Sustainable Funding Team (Chapter 5) and who sees the long-term merit of the model.

An alternative to having someone explain the Benevon Model in person is showing the board one of our free online videos. Tell your board members the name of your Point of Entry Event and show them where the Ask Event lives on the cycle, so that they see it is just one step in a four-step circular process that spirals up to major gifts and endowment.

#### FINANCIAL GOALS (10 minutes)

The same board member who is leading your Sustainable Funding Team should review your annual financial goals, tell them the date of your next Ask Event and, using our formulas, the number of Ambassadors and Point of Entry guests you will need to have by a specific date. Review the size of your Leadership or Challenge Gift, sponsorship, and total dollars to be raised in cash and pledges from the Ask Event. This is also a good time to mention any other fundraising goals that the organization has for the year, including major gifts, capital, or endowment.

#### AMABASSADOR ROLE (5 minutes)

Explain the critical role of Ambassadors in engaging new people. Show the job description for a volunteer Ambassador (Chapter 9) and invite every board member to become an Ambassador if they choose, but only after they have attended your sizzling Point of Entry Event.

#### ORGANIZATIONAL TREASURE MAP (15 minutes)

Make a quick Treasure Map (Chapter 9) for the entire organization, together as a board. Let them identify groups in the community they feel would want to know you better. Show them the list of Ambassadors you have developed. Invite them again to become an



Ambassador if they have not done so already and to identify other potential Ambassadors from the Treasure Map.

#### PERSONAL TREASURE MAPS (5 minutes)

Have each board member make a personal Treasure Map of the people in their lives who would naturally want to attend your Point of Entry Event. Ask them to make a list of at least 15 of those people. This list can become their guest list if they agree to be an Ambassador and ultimately a Table Captain at the Ask Event.

When combined with the many groups on your organization's Treasure Map, these personal Treasure Maps of your board members, collectively, could fill many Point of Entry Events and ensure a high percentage of engaged and well-cultivated potential donors at your Ask Event.

#### BOARD AGREEMENT (10 minutes)

Ideally, the board chair leads this part of the agenda, guiding people through the written agreement in their packets listing the optional and required methods of board participation.

Here is the Sample Board Agreement we recommend, which you would customize for your board.

#### DISCUSSION/Q&A (10 minutes)

Be sure to allow time for even the quietest of board members to express themselves. Try to get feedback from every board member.

### **To Summarize**

Your board members are volunteers. They are a gift to your organization. Treat each board member as you would treat every other lifelong, major donor. Give them the one-on-one, personal attention that honors their involvement. In every interaction, share a human story or recent example of the impact of your work. Show them the utmost respect and care. In time, they will introduce their friends and colleagues who, in turn, will become loyal, lifelong donors.