



Transcript of February 2021 Board Fundraising Webinar

Caroline: Great. Well, it is 2:01. So, let's go ahead and get started. My name is Caroline and I'm with [Boardable](#). Now, you've probably heard of Amy before, because she's such an expert in this field, but if you haven't heard of Boardable before, let me introduce you to a central place where you can do all of these board and staff operations, everything from storing documents and sharing them securely to [meeting details](#). You can plan your meetings in there. We have an [agenda builder](#), a new [video meeting platform](#) that you can check out, as well as all kinds of other productivity features. And I'm just going to point out here at the bottom of the screen, you can do a [free trial](#), two weeks, no credit card, no commitment, just give it a test drive at [boardable.com](#). Okay. And with that, I'm going to introduce our guest today. We are so excited to have you, Amy. Thank you for joining us. And Amy is with the Capital Campaign Toolkit. She's got all of her contact information here, lots of great free resources there. And we'll touch on these later in the webinar, as well as include this slide deck in your replay. Also, Amy and I are going to turn our cameras off so that your sound quality is as good as possible. But Amy, thank you for joining us.

Amy: Thank you so much for having me. All right. I'll turn my camera back on in a little bit when we're answering questions. For now, we'll let you focus on the slides, but do feel free to enter any questions you have and we will do our best to get to them throughout the presentation and at the end. But we're here today to talk about how board members can raise money in less than 15 minutes a month. And I know that this is a hot question on everybody's mind, how on earth can we engage our fundraisers, our board members in your fundraising? So, before we get into how to engage your board members, I want to go over just a very few fundraising basics because I think that sometimes we neglect to educate our board members in fundraising. And so, I want to make sure that we're all operating off of a baseline and that you have the language and the tools to educate your board members about what fundraising is.

So, first of all, I like to start with the four steps, the basic steps of fundraising. Step one is donor identification. Who are we going to raise money from? Step two is cultivation. That's relationship building. You probably know fundraising is all about relationships. Step three is solicitation or the actual ask. And step four is stewardship. That's the follow-up and thank you process. Everything that comes after the ask. And round and round we go, and we hope that donors get into the cycle and stay with us year after year after year. And most board members don't understand the fundraising process and this actually can be used for any type of fundraising that you're doing.

I talk most frequently using this cycle about major gift fundraising or individual donor fundraising, but it also applies to grant writing, event planning, direct mail, any type of fundraising that you're doing, you'll want to identify who you're fundraising from, build relationships with those people, whether they're at a corporation or a foundation or through the mail or individually ask them for money. Again, it might be in person, it might be through ticket sales, it might be through a grant application or a sponsorship request, and then thank them and follow-up. So, all your fundraising is going to go through this cycle. And it's really something that board members don't understand. So, before we can get them to help with fundraising, we need to explain it. Now, these four steps are the same, and I'm just showing you here them broken down into a slightly different frame.

So, this is the amount of time you might expect to spend in each of the stages, and I'm gonna look at it through a major gift or individual donor lens. Now, let's say that you want to sell a ticket. I don't care whether it's a gala ticket or a raffle ticket to your golf outing, to your virtual event, whatever you're doing these days, you want to sell a ticket. So, you ask your board members to help sell tickets. So, you give them out to the board members and your board member identifies a neighbor. They're going to sell a ticket, a raffle ticket to their neighbor. They've lived next to this neighbor for 20 years, so they don't really have to cultivate or build relationships. They just walk next door, they knock on the door, they ask, you know, "Will you buy a ticket to my favorite non-profit?" They say, "Yes." "Thank you very much." The whole process happens in six minutes.

Now, let's say you're doing a major gift solicitation, right? You want to ask somebody for \$10,000 or \$100,000. So, it probably will take a little bit longer to sit down and think

about who in our community, who do I know, who in our area has the potential and the interest who might give \$100,000 or \$10,000? And so, that donor identification stage takes a few weeks or a few months as you go through your donor lists, you look around, you do some research, you get together with the committee and you come up with a list of 5 or 10 or 50 people who can and might give \$10,000. But then you take the people on your list and you cultivate them. You give them tours, you invite them to volunteer, you invite them to serve on a committee, you get to know them, you ask them questions. That might take 6 or 8 or 10 months to cultivate them. And then you sit down and ask them for a gift. And that takes 30 minutes, right? You sit down, you have coffee, you ask them for \$10,000. And then you thank them and follow-up with them over a period of months.

So, the difference in these two scenarios really points to the fact that the one thing that board members really are afraid of doing, or for the most part, don't want to do in fundraising is ask. And here, by giving that example, we've shown them that even though asking or the solicitation is a really important part of the process, it's actually a fairly small part of the process in terms of the time. You know, if it takes you a full year to go through this cycle with someone you're going to ask for a major gift, the solicitation is only 30 minutes out of, you know, a 12-month timeframe here.

And so, what my goal is, is to have board members engaged in fundraising at some part or several parts of the process, not every single person is necessarily going to be involved in the asking. And I think that's a really important thing to understand and explain to board members that we want every single board member involved in fundraising, that doesn't mean they all need to ask. And I'll give you one example which will help clarify why. First and foremost, we want board members doing what they feel comfortable with and happy to do. If board members are happy to help with the thank you in the follow-up process, I want them to do that. You know, eventually, they'll get involved in other parts of fundraising, but I don't want to ask them to do something that they're so uncomfortable with that they're not willing to help with anything or at all.

I was a few years back working at an organization and a board member had helped me identify one of his colleagues and we were cultivating him and it came time to ask this individual and the board member was really nervous. And so, he wanted task

his friend for \$5,000. Well, I wanted to ask his friend for \$25,000. Now, if the board member had come with me on that ask, we would have asked for \$5,000, but I politely asked the board member to stay home and he was thrilled to be let out of the ask and off the hook, and he stayed home and I went and asked his friend for \$25,000, which he gave us.

Now, if the board member had not introduced me to his friend or helped cultivate him, that gift would have never happened. So, that board member really helped with fundraising, but it wasn't necessary or appropriate for him to come on that particular ask. And so, if you explain this to board members that they can really help with fundraising without being involved in ask, many of them will sigh a big sigh of relief. So, one of the myths that your board members believe is that all donors give equal amounts, right? So, if you want to raise \$100,000, say, your board members believe that all you need to do is go out and ask 100 people for \$1,000 each. And, of course, the math works, but it's really actually very hard to find 100 people to give you \$1,000 each, and it's simply not the way fundraising works. So, we want to make sure that board members understand how fundraising does work.

An easy explanation is to talk about the Pareto principle, you may know it as the 80/20 rule. And so, the 80/20 rule or Pareto's principle says that 20% of your donors probably give 80% of the dollars that you raise. And 80% of your donors only give 20% of the dollars you raise. And, you know, there's all sorts of examples that we can use. For example, 20% of drivers cause 80% of accidents and 80% of drivers only cause 20% of accidents. So, this principle applies in fundraising as well. So, it doesn't make any sense that to raise \$100,000, we would ask, you know, 100 donors for \$1,000 each that's not how fundraising works.

So, if you want to raise \$100,000 this is how fundraising works. That 80% of the dollars would come from about 20% of the people giving. So, if you look at this first blue arrow here, in the first row, you'll see that if we want to raise \$100,000, we want 1 gift and 2 prospective donors. So, 2 potential people to give us a gift of \$20,000 for 1 gift. If we can get that, 20% of our goal came from the first donor. Then if you look at the second blue arrow down here at 70%, you'll see that we get to 70% of our goal from our first 12 donors. So, really making sure that you take the time to help board members

understand how fundraising works is critical to them being able to successfully help you raise funds.

So, in this particular example, we need a grand total of 57 gifts to get to our \$100,000, which is way less than the 100 gifts we were talking about if everybody gave us \$1,000 each. So, in this scenario, we only need let's say less than 30 people to give us \$1,000 or more. Really only, you know, only let's say 9, 6 people. I don't know. Six people to give us more than \$5,000 each. And then our fundraising gets easier and easier or maybe not. Maybe the first 5 gifts are actually the easiest because those are the people that we know about and that are closest to our organization. What I've really learned is that it's no harder to ask for \$25,000 than it is to ask for \$1,000 if you've cultivated the person and they have those financial resources to give.

One thing that you want to make sure that your board members understand is that fundraising is not about money, right? Let me say that again, fundraising isn't about money and you maybe...

Caroline: That's a good one.

Amy: Yeah, exactly. Are you surprised to hear me say that?

Caroline: Yes.

Amy: It's not. It's about impact, right? So, what are we fundraising for? We're fundraising to eliminate cancer. We're fundraising to create art. We're fundraising to clean the environment. We're fundraising to cure the sick or to take care of the elderly. So, really, I promise if you can get their brains away from money for a little bit and focus on what are we paying attention to, you know, talk about fundraising in terms of impact, everybody will be happier than if you're talking just about money. Does that make sense?

Caroline: Yes. I think that will really resonate with people as an easier way to go.

Amy: Yeah. All right. So, I want you to also perhaps talk to board members at every meeting about changing the language they use, to think about fundraising and talk

about fundraising. So, we're really thinking about how do we change our mindset, and I think this is a really important sort of aha moment for board members. So, instead of them thinking that fundraising is about arm-twisting or guilt-tripping their friends or I've even heard board members talk about picking pockets of their friends, we don't want any of that. So, I'm actually to ask you guys to go into the chat box right now, and I want you to think those are all negative words, you know, negative connotations around fundraising. So, what are some positive words that we can use instead? So, if you could, open your chat box and give me some positive words that board members, ways that they can think about fundraising.

Caroline: Yeah. It's so powerful how not only for the donor but even for your confidence of asking how choosing words that feel more positive and comfortable help.

Amy: Yeah. So, I love some of these. Arnie says opportunity. D's talking about supporting the mission. Jermaine is inviting you to join me, right? Krystal's talking about partnering. Tron, investing. So, we want you to invest. We want to provide you with an opportunity to give. We want to make a difference, right? Help change the culture, raise awareness, become our partner. I love some of these. Inspiring, Aaron. Yes. I love that word. Inspire, invest, improve the community. So, I am so happy to see this long list and growing of all of these wonderfully positive words that we can use around fundraising. So, the next time you catch yourself or your board members talking about having to fundraise, "I have to fundraise." "No, you get to fundraise." Right? Hear the difference between that? You have to fundraise or you get to fundraise.

And I will tell you the first time I asked for a really big gift, I was busy thanking the donors and the donors were busy thanking me. And like for a split second, I was a little confused. Like, "Why are the donors thanking me? I just took their money." Right? Talk about negative words about fundraising. I took their money. But really what I had done was give them an opportunity to feel so good because they made a difference in the world. And that's exactly right. I mean, you won't ever find someone with their name on a building who's given a big donation somewhere, a hospital or a university or anywhere that feels badly about it. They feel great about it. And if your donors feel badly after you ask them for a gift, you've done something wrong. You know, they're

never going to give again, they're not going to pick up the phone when you call. So, we want to make sure that your board members feel great about fundraising. They're providing people with an opportunity to feel good about themselves and really do something great in the world.

So, that was sort of our fundraising basics, but we want to make sure that you really are able to articulate very clearly to other board members what fundraising is and why they should be involved. And so, now, I'm going to give you for the next 30 minutes or so a series of activities and exercises that you can do in board meetings in 15 minutes or less, ideas and opportunities for board members to really get involved both inside and outside the boardroom. And when I say boardroom, I am including the virtual boardroom. So, whether you're on Zoom or you're actually in-person these days, I want to give you ideas. Some of them much less than 15 minutes, some of them a little bit longer, but things that your board can do as a group and things that your board members can do individually to really help with fundraising.

And the first thing to do is to make sure that you are having fundraising discussions at every single board meeting. And I will say that it is not last on the agenda of your board meeting. If you have fundraising last on your board agenda meeting, guess where your board members feel in terms of the priority at your organization. That's right, it's last. So, make sure that you move fundraising up in terms of earlier on in the meeting and make sure that you're having a robust discussion. So, no more handing out development committee reports and then just having somebody read off the report. They can do that in advance or even after the meeting. The meeting time is for meaningful discussion where you're really going to engage your board members.

So, I want you to think about having a discussion calendar for the year where every month or every time you have a meeting, you would have a topic, a fundraising topic. And this is just a very general suggestion example, but you come up with your own topics. So, in January, you might have a discussion about bequests at your board meeting, and you may decide that you don't have anybody internal who can facilitate that discussion. So, you might want to hire a consultant or your development director or your executive director or board chair or board member can lead the discussion as well.

So, let's use my example of Bequests. Why on earth would you have a discussion about bequests at your board meeting? Well, if you want to solicit bequests, ask for gifts and people's wills, it's got to start at the board level and your board members need to be comfortable with the topic and understand why it's important and why they should be soliciting bequests and why they're important to your organization? So, you know, to facilitate a topic like this, which is clearly sensitive to many people, you might want to ask in advance, do any of our board members have a charitable bequest in their will either to us or to any other organization, and would they be willing to share at the board meeting why they put a charitable bequest in their will, how easy it was to do, how they made the decision, and anything else that they'd want to share? And so, and then have a discussion about, you know, why it's difficult to talk about? Why bequests really help at your organization? And just really think about the open-ended questions that you want to ask to have this type of discussion.

So, there's, you know, many other topics, some of these I'm going to discuss as we go through this conversation, but really thinking about, you know, what are the topics that you're going to have on the table for board meetings? Are you going to have an annual retreat maybe at your development committee meeting? What topics? Who's going to facilitate how the discussion is going to go, but making sure that you're including everybody? Who participates around the table so that everybody starts to get comfortable with the language and the topics of fundraising? All right. So, we went through the four steps. I'm now going to give you some additional ideas of how you can engage your board members and get them to help in each of these areas. And Rebecca, I see your question, "What does DOD stand for?" Director of development. That's your chief fundraiser at your organization. A development director, so it might be DD or DOD as director of development. Okay. All right.

So, one idea for one of your board meetings or at a board retreat, you will do an exercise where you ask board members to think about how they tell the story, their story of your organization. And so, when we're having a board retreat or a board discussion, one of the really important roles and responsibilities of board members is to be a good advocate for your organization. And so, they need to be out in the community telling your story. So, I like to have them practice thinking about their own story as it relates to your organization. So, I ask the question, why do you serve...or have them ask themselves, "Why do I serve on the board of this organization? I could

serve on any board, there are so many needy important causes, so why do I serve here? What difference does it make to me? What am I proud of, right? Is there a specific moment or a specific event or a specific story or a specific program? What's the impact on our community, in my own words, right? It's not regurgitating the mission statement, but how do I talk about this organization? How are we different or unique?"

And you know, I bet a lot of your board members aren't able to articulate that well. And so, having a discussion, maybe in small groups, whether you're on Zoom or in-person, you could have them think about the answers to these questions for two or three minutes, and then partner off. You know, get in groups of two or three, like I said, either on Zoom, you can use breakout rooms, or you can do this you know, live, you can go into small groups and share their stories and answer the question. If I have a lot of time, if I'm in a board retreat and I have 30 or 40 minutes, then I will have them get up and speak to one another in pairs and then switch and get new partners. Every 5 minutes or so I have them switch partners three or four times, and then at the end, then we debrief and we talk about how did their story change and develop as with each new telling? How did they change their story depending on the audience that they were speaking to? How did they become more articulate with each telling? So, really making sure that your board members have the language to talk about the organization. And so, you can do this in 15 minutes at one board meeting just going around the room and asking people to say one thing that they're proud of or why they serve at the organization. You can do one question each month until everybody has better language to articulate why they serve.

Another exercise that you could do at a board meeting would be to have a fundraising brainstorm, right? So, break out into small groups, identify facilitators and reporters. You might want to have groups of three, four, or five people and ask them how can board members help with fundraising? So, you really want board members to come up with these ideas. If you give them a list of ways that they can help with fundraising, they're much less likely to follow through than if they come up with the ideas. So, you really want to do, you know, a board meeting or two or three throughout the year to have different discussions, and you can do them in small groups or in big groups. So, ask the question after you discuss the four parts of the fundraising cycle, right, donor identification, donor cultivation, donor solicitation, donor stewardship, ask

them to brainstorm all the ways the board members might be able to help with fundraising.

And one of the tools that I like to use when I'm doing a board retreat is asking them to break out their ideas in easy, medium, and difficult. And so, really thinking about, okay, writing a thank you note might be easy for most people. That's fine, especially if you give them bullets. If you give them all the tools and materials that they need. Making a thank you call might be easy for some board members and medium for others. Making an in-person solicitation, that would be difficult for most board members, but brainstorm all the different ways that they can help be involved with fundraising. They might share something on social media, that might be easy for everybody. So, just really thinking about how can we do a fundraising brainstorm? What are the tools we need to make the exercise go well? And here are some...

Caroline: Karen asked, you are referring to this would be in your board meeting, not like a marketing or development meeting that we would [inaudible 00:28:14]?

Amy: You could do it with both, but yes, I would do this with a full board, right?

Caroline: Great.

Amy: Yeah. Yes. Thank you. You could do this in your development meeting, but I would include all board members because I want all board members involved with fundraising. So, here are some things that they might come up with in a fundraising brainstorm. You know, how can they advocate on behalf of the organization with phone calls, by writing, by sharing on social media. They could introduce the executive director or clients to donors. Invite their colleagues, their friends, their family members to volunteer. They can invite them to an event. They can invite them for a tour or to a meeting. You know, this takes less than 15 minutes a month. So, it's just sending an email. It's making a phone call. So, asking for gifts, you can ask online by sharing a link by mail. You can hand-write a note. In-person, that probably takes a little bit longer than 15 minutes. Asking over the phone.

So, these are things that I hope that they come up with some of the things in their brainstorm. So, of course, making phone calls to thank donors. You know, you can ask

board members, can you make one thank you call a week? Four thank-you calls a month? Can you call to invite three people a month to come on a tour or to volunteer or to provide an update? So, all things that are less than 15 minutes a month. They can write thank you notes, appeal letters, you know, whatever you need them to write. Just give them bullets, give them stationary, help them out, make sure that they are really effective, sharing on social media, inform people about programs and services, share your newsletter.

So, you know, in their brainstorm, I want them to come up with this list because they're much more likely to agree to do something than if you just give them a list of things that you want them to do. Now, listen, they may come up with things that won't be so helpful. So, after they come up with this brainstorm, ask them, you know, pick three things that you would be willing to do over the course of the month. You know, maybe one thing this month, one thing next month, something else the following month, and I'm going to call you, I'm the executive director or development director or the board chair because board members need reminders and encouragement. So, I'm going to check in with you, whether it's monthly or quarterly to discuss these activities you picked and find out how we can help facilitate it.

But really, if you can get board members who aren't helping with fundraising to do something in 15 minutes a month, you're going to have all those board members who weren't helping before now helping because everybody can do 15 minutes a month. Kyle, "How about a Zoom tour?" I think absolutely, right? Absolutely. You can have board members, if it's an effective Zoom tour, you know, you really want to plan that out and make sure that it makes sense. I always used to joke, you know, you don't want to give people a tour of your administrative office, nobody needs to see your copy machine you know, or your executive director's office. A tour needs to be meaningful of your program. It means, you know, you need to be introducing them to program staff and hearing about the programs, you know, introducing them to clients if that makes sense. They need to see the program in action. So, if you can do that over Zoom by sharing testimonials or video clips or, you know, meeting clients, fine, but you know, nobody needs to see your copy machine. That's not a tour of your office.

Caroline: That cracks me up. Have you seen that happen?

Amy: I unfortunately have. You know, they are giving a tour of the office, and you know, if it's not a school or there's, you know, nothing to show, I have seen people think that giving a tour means a tour of the offices. And that obviously is not what we're talking about here. All right. So, another suggestion is to...so one month you may want to talk about prospect identification, donor identification, and we use this handy little acronym ABC to talk about and help board members understand who the best potential donors for your organization are. And so, A means we have access to them. That means that if you email them or you call them, they will pick up the phone and they will respond. So, that immediately tells your board members that Oprah Winfrey and Bill Gates are not good prospects for your organization because they somehow believe that the best donors are out there somehow.

But really we know that the best prospective donors are really already part of your community. They are people that you know. They are people that you work with and they're your existing donors. B stands for belief. The best prospective donors for your organization are people who believe in your mission and your cause. And C, for capacity to make a gift. Whether it's large or small, they need to be able to make a gift. So, you know, one of the exercises I do when I visit a boardroom or I'm thinking about helping board members understand who they know so that they can introduce them to the organization, I do a little exercise called "Who do you know?"

And at the front of the room or in the Zoom room, I draw this on a little flip chart with you in the middle, and I give them examples of big groups of people that they know, co-workers, friends, family, neighbors, all sorts of people. And so, and sometimes it's a little painful and there's silence for a few minutes, but I just ask them, you know, let's try and get 10 circles up here, right? What big groups of people do you know? Your neighbors, your kids' friends parents, your vendors, you know, your lawyer, your accountant, your hairdresser, you know, whatever. Let's fill this out. Friends on social media, people you went to college with. So, we want big groups of people.

And so, the reason that I do this exercise with them is because if I walk into a boardroom and I say to board members, "Who do you know?" "Who do you know that we can fundraise from?" "What do you think is going to happen?" Nothing. Crickets. Nobody knows anybody. They say, "Oh my gosh, I don't know anybody." So, instead, I'm

going to invite them to think about big groups of people that you know, and all of a sudden, very, very quickly, you know, at least 100 people, right? Friends, family, coworkers, neighbors, people from college, you know, colleagues, whatever, people from your golf club or tennis or your book club or rotary, your church, your synagogue, the list goes on and on, right? So, all of a sudden, everybody in the room knows 100 people. And then we go back to this ABC and say, okay, A, you cross off the list because you have access to all these people, everybody on this list would respond to your phone call or your email. So, now, we have to look at B and C, which is belief and capacity.

So, I ask everybody in the room, think of one person from each circle who could or does believe in your mission or your cause. So, think of one friend who cares about animals. One family member who has had cancer. One of your colleagues who cares about education. So, whatever issue I'm working on. And then, identify just one name from each circle that could care about the cause and has the potential to give a gift large or small, and then tell them those are your prospects for the year. Those are the people we want you inviting events to. Those are the people we want you sending our newsletter to. Those are the people we want you handwriting a note on our next appeal to. So, just pick that's how you can help identify people to solicit. Okay.

Another wonderful exercise called, "How high will you go?" Comes from this wonderful book called how to "Train Your Board (And Everyone Else) To Raise Money." It's by my partner at the Capital Campaign Toolkit, Andrea Kihlstedt and her partner in crime, Andy Robinson. They wrote this amazing book. I'll send you the title later. It's called how to "Train Your Board (And Everyone Else) To Raise Money." And there's this exercise in it called, how high will you go? It's a wonderful thing to do at a board meeting. And basically, you ask board members to think of \$2 amounts. One is the regular amount that they would normally give to your organization and the second is a gift that they could make significantly higher than the first amount if possible that's realistic. So, they don't have to win the lottery, they don't have to get a big inheritance. The second gift is an amount that they could make.

And the point of the exercise is to get board members to think about their own giving, but also to understand how donors, in general, make giving decisions. And so, when everybody has two numbers in mind, the normal amount that they would give to the

organization in the course of the year and a second higher gift, ask them to take a few minutes to write down as many things as they can think about that could happen that would encourage them to seriously consider giving that higher amount. So, just have them brainstorm by themselves for two or three minutes all the reasons that they can think of that they would consider giving the higher amount and then go around the room, again, you can do this on Zoom, you can do this live and in-person, and ask everybody to share one thing from their list. So, all sorts of great ideas will come up.

For example, you know, "If there was a matching gift opportunity, I would consider the higher amount." "If there was an emergency at the organization, I would consider the amount." "If there was a really compelling program or if there was a really big donor recognition opportunity or if I was asked by somebody for the higher amount." So, you're going to go around the room and hear all the reasons that they came up with that they would consider. And then you can have a debriefing session about, you know, which ones of these can we control? Which ones are we already doing? Which ones should we do? So, if we don't have a matching gift opportunity, let's see if we can identify someone to provide a matching gift because then, some of our donors and some of our board members would consider giving more.

One of the really important ones that may or may not come up is if I was asked for a higher amount, I would consider it. And you may know that's actually the number one reason that people do consider giving higher gifts is if they are asked for a bigger dollar amount. And so, if somebody says that, you want to circle that, put a checkmark next to it, give them a gold star. Tell them, ding, ding, ding, you know, you got the number one answer for the day. If you go around the room and nobody says if I was asked for the higher amount, you could say, there's one answer that's really important that's missing from our list. And so, it's a great exercise to help them think about why they make their giving decisions and how they make their giving decisions, and why other donors do as well. All right. One more exercise and...

Caroline: I like this.

Amy: You like board member bingo?

Caroline: Yeah.

Amy: Yes. This is a wonderful exercise. And I have to say, you probably do need a little more than 15 minutes. You probably need 20 or 25 minutes for this one. Most of them can be done in 15 to 20 minutes. But this one perhaps save for a board retreat or a slightly longer meeting. And basically, the rules are unlike in bingo, in regular bingo, you don't need to just get a row or a column, but the goal is to actually be able to fill in all of the squares. And so, you're going to want to do this one in-person. This one I don't think works in Zoom. So, you're going to have to wait until we go back to in-person, but you ask everybody to stand up. Everybody gets a bingo card, including staff members that are in the room, everybody plays. Everybody gets a bingo card and the goal is to go around the room and be able to put somebody's name in every box. The rules are you can only use the same person's name twice.

So, if it was me, I would put my name under...let's see, has solicited a major gift, I would put Amy and I would put, loves to travel. So, I would put Amy in those two squares. But then I'd have to go around the room and ask other people, "Are you an accountant?" "Are you a CEO?" "Are you under 40?" "Are you an immigrant?" "Are you an attorney?" "Do you have a bequest?" Etc. And so, you give people about 10 or 12 minutes to play until they have most of their squares filled, generally, they don't fill all the squares, and ask people to sit down. Then find out, are the same boxes on everybody's bingo card empty?

So, ask, which squares could we as a group not complete? Do we not have an accountant in the room? Do we not have an attorney in the room? Do we not have anybody who's given a major gift or solicited a major gift? Do we not have anybody who's donated stock? So, we can talk about what does that mean about our board? You know, what do we need to think about? So, you can fill in these squares with anything you want, but it is a really fun wonderful way to get your board members up and talking to one another. But then say, what does it tell us about our board that nobody in here has solicited a major gift? Or nobody has a charitable bequest and nobody has donated stock? So, this is a great exercise. All right.

So, Debbie's asking, "How do you define a major gift?" And that's an excellent question, Debbie. Thank you for asking. A major gift is different at every organization and to

everybody and to every donor. So, there's not one definition. I define a major gift as when you sit down with an individual donor and ask them for a specific dollar amount that's meaningful to your organization and to them as a donor, okay? So, for your organization, a major gift might be \$1,000? For the local hospital, a major gift might be \$25,000? But for the big university in town, it might be \$1 million and up. So, it really depends on who's on your board, who's in your donor database, what kind of fundraising history you have? And it also from the donor perspective, you know, a gift of \$1,000 might be really major for one donor, and you know, pocket change for another donor. So, I think there's no one rule for what a major gift is. So, that might be a conversation you want to have before you play this type of game, right? Or maybe you can define it after nobody fills in that box.

Another one wonderful thing to do at your board meeting, I should say is hold a brag session. Every single meeting if you can, you want to call out board members for big and small things that they have done to help with fundraising. And so, you might at one meeting give a certificate and it doesn't have to be for the most dollars raised, you might give a certificate for somebody who made thank you calls this month and just say, you know, "Thank you for being an awesome thinker." Right? You want to thank people for introducing the organization to potential donors. You want to thank people for whatever they do for fundraising. You know, if somebody does solicit a major gift, you certainly want to call them out. And, you know, honestly, whether or not they got the gift, you want to thank them for their courage, for having the courage to actually ask for that gift, whether or not that gift came through. So, you want to hold a brag session. You can ask people to stand up. You can cheer. You can clap. You can, you know, snap fingers if you're on Zoom, whatever it is, do waves. But you want to really hold a brag session and recognize people and show that you're appreciative of big and small ways that they helped with fundraising and so that everybody wants to be recognized. And it's a wonderful thing to do.

So, I'm going to start to wind down. So, if you have questions, I'll be winding down in the next two or three minutes. I'll turn my camera back on so you can see that I'm really here and we can answer questions. But I do want to just point you back to this fundraising cycle for just a minute. I think that this is absolutely critical. If you can get board members to agree to do one thing outside the boardroom, so, you know, we focused a lot on the activities that we're going to do inside the boardroom, but a lot of

them are about also encouraging your board members to spend 15 minutes a month on fundraising outside the boardroom. So, whether that's helping identify people, helping build relationships, actually soliciting or stewarding, that's the thank you and the follow-up, we want every single board member doing one thing to help us with fundraising in 15 minutes or less every single month. So, it might be writing thank you notes, three thank-you notes. It might be making two thank-you calls. It might be forwarding an email from the organization with a personal note inviting them to an activity or sharing your newsletter and pointing out why it's important to you. It might be adding a personal note to an appeal letter if it's a solicitation, if it's a request for money.

So, there are so many things and if you can have your board members come up with a list of things of ways that they can help with fundraising and you can frame it so that the conversation's meaningful and then say, listen, pick the ways that work for you. We want every single person on our board spending at least 15 minutes a month on fundraising. But give them all the tools and resources and support that they need to be successful. Then it's much more likely that they're going to be successful. All right. I'm going to give you some free tools now, and then I'm going to just stop and answer any questions. I send weekly emails and I write weekly blog posts on this and other topics related to fundraising. If you can go to my website, amyenstein.com. You don't even have to go to /join, but that's fine. I'm going to give you two free eBooks and then you'll be on my list and I will send you weekly fundraising emails. Lots of free stuff on that amyenstein.com site. So, I would encourage and request that you go there to hear more from me.

I also have "A Board Member's Guide to Capital Campaigns, What Every Board Member Needs to Know." That's at my other website, capitalcampaign toolkit.com. This one is a pain in the neck. The URL is board-members-guide. We can probably send that out in a follow-up email with the slides, but it's at capitalcampaign toolkit.com/board-members-guide. So, we'll get that to you. And finally, you can reach me in both of those websites, at amyenstein.com, at capitalcampaign toolkit.com, and the final thing I'll say is that I have a podcast called "All About Capital Campaigns." So, if you go to any of your podcasting apps, wherever you download your podcasts from, just look for "All About Capital Campaigns." And that is my weekly podcast. So, Caroline, I am ready for questions.

Caroline: Okay. Well, we have got some great ones that have been coming in this whole time. Go ahead and enter any more if you have them while we talk here. The first one I thought was really interesting is, let's see, Tony asked, when you were talking about the major donor solicitation you did, but the board member wasn't comfortable asking their friends so you did it for them, Tony suggested maybe the donor was also more comfortable talking to you than to their friend.

Amy: Yeah. Absolutely. Could have been. Great point. You know, one of the things when I coach executive directors on fundraising, because, you know, oftentimes staff is not comfortable, it's not just board members who are uncomfortable, staff or members are uncomfortable asking for gifts as well. So, I coach executive directors who are nervous about fundraising to say, "Hey, listen you know, I did not get into this line of work to raise money, it's not something that I love doing or I'm comfortable doing, but you know, the kids or the environment or healthcare is too important for me not to be out talking to people like you who care about our issue, about our needs. So, that's why I'm here." So, you can lay it out and say, "Listen, I don't know what I'm doing. And I don't really want to be here. I want to tell you about our needs. And so, I'm here to ask you to consider a gift of \$5,000, which would really help us out this year. Is that something you'd consider?" So, I think, you know, it's perfectly fine for both board members and staff members to be uncomfortable, but at the end of the day, the staff members are the ones who are going to go out and ask if the board members are not comfortable doing so.

Caroline: I like that idea of just being honest and a little bit vulnerable because it's such a human thing, you know?

Amy: It actually, you know, diffuses all the pressure in the situation. The donor may be nervous and uncomfortable too. So, just say, you know, I know this is an awkward conversation, but I know you care about our cause and we can't, you know, do our programs and services without supporters like you. So, even though, you know, I'm not sure I want to be here, I'm not sure you want to be here, but we both want to you know, find a cure or take care of animals. So, that's what brings us together is our passion for the cause.

Caroline: Yes, we have a lot of questions around, you know, our board won't even approve a 100% give-get or our board doesn't even give their minimum. How can I ask them to ask other people? That might come down to maybe some of these board members need to transition off the board, what do you think?

Amy: Yeah. So, I'm pretty adamant that although there are exceptions to every rule that the rule is that board members need to give first, okay? Now, you know, I think there are pros and cons to specific minimums I think, you know, if it works for your organization fine, but my rule of thumb is that every board member needs to give a significant and meaningful gift for their own personal finances. So, that means some board members might be giving \$25 a year, other board members are giving \$25,000 a year on the same board, but every board member needs to give a significant and meaningful gift for their own personal finances and that they need to do so early in the year. So, I want every board member giving in January and February, or if your fiscal year, you know, maybe June or July, but I like to say to board members, listen, we can't go out and ask anybody else for money until we have commitments from every board member. So, I think that's critical.

Caroline: That makes sense. It's the old skin in the game.

Amy: Exactly.

Caroline: Not the prettiest term but yeah.

Amy: And if you don't want to be a donor and you just want to be a volunteer, that's fine. Then we can thank you for your board service and you can step off the board and serve on committees and be a volunteer in other ways. But board members are extra special because they do both. They both give their time and their financial resources.

Caroline: Yes. And too, I think, you know, it's worth a try to present these simple ideas. Maybe some people just are so intimidated by it that they're, as far as the ask not their personal giving, obviously, but you know, a lot of people are saying, "No one will." You know, "Board members don't participate. I keep asking them for help and they

don't do it." But perhaps having these specific actionable exercises will help them feel a bit more enthusiastic about it.

Amy: Yeah. So, Julie's saying she bridged the topic of giving and had two board members quit. They told me they didn't sign on for that. And you know, you're not saying, Julie, if that was a good or a bad thing, to me, you know, probably a good thing. You know, it's not a bad thing to have board members leave, but they bring up a really important issue is that they were not recruited with the expectation of giving because they didn't know that when they came on and that is the organization's fault. You need to recruit board members with the expectation that they will be giving. And so, I think it's not a bad thing that they quit, but from on, when you're recruiting board members, they need to know what those expectations are upfront. So, they also had a good point.

Caroline: That's a really good point. We talk about that a lot in all of our fundraising webinars is setting that expectation upfront. That way, you don't end up with people who aren't interested in doing what they need to do. Let's see, what about board members who give through a foundation or their corporation but do not personally give?

Amy: Yeah. You know, that's a slightly trickier one. I think that if they were asked to sit on the board by their company and they're there as a representative, then I think that I would count that. If they're there because they personally care about the cause, I would ask them for their gift as well. You know, you want to tread lightly, but I think that's how I would approach it.

Caroline: Yes. I saw Rebecca here saying transitioning board members is easier said than done. Now, I will just throw out, we have an eBook right now on remote board member recruitment. So, she might want to check that one out if we're getting rid of some dead weight here.

Amy: Excellent.

Caroline: Okay. One more here before we finish out our hour. Debra says, "We tend to have donors who have specific items they will donate to only, and gifts are not strategic. Any recommendations about this?"

Amy: Yeah. So, you want to be careful what you're accepting you know in kind, right? Do you actually need it? Does it alleviate a line item in the budget? Explain to your board members that whatever they're giving in-kind or pro bono does not pay the light bills, it doesn't pay for staff, it doesn't pay the mortgage. And as board members, you hope that they understand the needs and pressures of the budget. That in addition to those in-kind and pro bono things that you really need financial contributions as well. If you can't explain it so that board members understand, it's going to be really hard to explain it to members of the public and to other donors.

Caroline: That makes a lot of sense. Well, Amy, I've kept you here for an hour and we have so enjoyed this practical, very actionable advice that you've given us. I know the comments are just glowing. So, one last time for everyone, we will send a replay recording and the slide deck so you can share all this great info with your board and you have Amy's contact information all in there as well. And we will send that tomorrow. It'll be on our blog. We also have it on YouTube and social media. Lots of places to keep an eye out for that. And with that, I will let us all enjoy the rest of our variously cold and warm Wednesdays. Thanks again, Amy...

Amy: Thanks so much for having me.

Caroline: Yes, we will talk again soon.

Amy: Take care, everybody.