

From GuideStar Newsletter – March – July 2008

These articles are from a series on helping board members embrace fundraising. Gail Perry is the author of Fired Up Fundraising: Turn Board Passion into Action and founder of Gail Perry Associates, a Raleigh, North Carolina-based consulting and training firm. During the past 22 years, she has helped organizations raise more than \$200 million.

Five Fundraising Mistakes We Make with Our Boards

Too often nonprofit board members shy away from fundraising. When the subject comes up, many trustees suddenly become invisible or silent. Yet it is our responsibility to set up board members in active, satisfying roles that can support the fundraising process. But we frequently make mistakes that hurt, rather than help, our cause.

Why are trustees so nervous about fundraising? And how do we go wrong when we approach them about helping in fundraising? Here are five common mistakes that cause board members to back off when they should be pitching in.

1. **Asking for money, not building and keeping friends.** Many board members are mistaken about fundraising. They think it is "asking for money." The actual moment of asking for a gift, however, is only one small step in the long, time-consuming process of building relationships with donors.

Board members don't realize the myriad activities that go into the fundraising process—identifying potential donors, cultivating and involving them in an organization, and, of course, finding ways to thank donors and foster their long-term relationship with our cause. They skip directly to the most difficult and awkward part of the fundraising cycle.

Presenting board members with the task of "asking for money" instead of "building and keeping friends" is not the most effective way to inspire anyone—board members or not—to raise money. If we can get our board members to change their point of view and have them focus first on making friends who then join our organization's bandwagon as donors—then everyone wins. We should never allow our good-hearted, well-meaning but nervous board members to get away with equating the entire process of fundraising with the act of soliciting.

Most fundraising training for board members misses the mark by jumping straight to soliciting. It eventually inhibits, rather than pumps up, board member energy and excitement for the cause. Introducing board members to fundraising by presenting a seminar titled "The Art of the Ask" is not a way to bring them gently to the table so they will embrace fundraising enthusiastically.

2. **Cold or "cool" calls.** Cold calls are the worst possible place to use the energy and good will of your kind-hearted board members, because cold calls have the highest rate of failure. If you send trustees out on calls that have a low likelihood of succeeding, they will experience defeat rather than success.

We should never subject our board members to this kind of rejection, which will incline them never to venture out for you again. Preserve their self-esteem and protect them from negative responses if you want their continued help. Why would they keep beating their heads against a wall if they are rarely successful?

Send them on easy calls that will create fun, shared vision, and passion for your organization, calls that will make them happy and give them confidence. Send them on calls where you already know what the outcome will be.

Send them out to make friends for your organization and engage the community with their passion. Set them to load everybody they know into that bandwagon they are driving.

I work hard to preserve my board members' good feelings about being involved in fundraising. I nurture their interest, starting them off with simple tasks to encourage them, such as thanking current donors or cultivating someone at an event.

Then, after they develop some confidence, I bring them along on a formal cultivation or solicitation call. I will rarely send a board member out to solicit alone, and only if I think he or she is a carefully prepared, experienced fundraiser.

After one of my Fired Up for Fundraising Board Retreats, a trustee once said to me, "This was so helpful. Before when someone mentioned fundraising, I immediately imagined cold calls. You have shown me that I can help in fundraising in lots of much easier ways. Fundraising is not necessarily cold calls at all; in fact, good fundraising is everything but cold calls."

3. **Too many calls at too low a dollar level.** If we are going to use board members in solicitations, then it is important to plan carefully the best use of their time in order to make the most of their valuable contacts and limited availability.

I have seen well-meaning but scared volunteers bravely step up to the plate, willing to make annual giving solicitations in person. Then the thankful but overly optimistic staff loads them up with far too many visits to make at one time.

Worse, the calls are for meager amounts of money. It is much better to focus our board members on fewer calls at much higher dollar levels. I believe in asking board members to make only three calls at any one time. Focus on quality, not quantity. It is better to give board members one task at a time than have them struggle with too many actions that never get done.

Use your valuable board members carefully where you need them the most, and where they will do the most good.

4. **Emergency fundraising, not long-term relationships.** I am all for a sense of urgency when raising funds. But all too often we wait until a crisis to mobilize our board members. Then the conversation really does become all about money rather than about the great work our organization is doing for community good.

At such times, we ask board members to help pull in money quickly to respond to a budget shortfall or cover some major financial loss. Again we are setting them up for unpleasant fundraising experiences.

In these cases, they will usually create a conversation about "money," not about a vision for a stronger, healthier community or a better world. This misdirection causes fundraising to be placed on the wrong plane, leaving board members with a distasteful experience that could have been avoided.

5. **Lack of training, structure, coaching, and support.** We often send our trustees out with too little preparation and backup. We tend to forget that they are volunteers. They are not the pros that we are. We need to give them thorough training to correct their misconceptions about fundraising and pump them up with confidence to venture out into scary fundraising territory.

Do not make the mistake of assuming that your board members understand fundraising, or how to talk about your organization. Be sure they have a solid understanding of the underlying philosophy of fundraising—which is developing donors/investors/partners who will stick with your organization for the long run.

They need—and deserve—first-rate support from staff. You will find that board members deeply appreciate this kind of backup. They need clear goals, clear organizational structure, and inspiration to wake up their passion and keep personal commitment to your organization's success.

The Myths and Realities of Board Members and Fundraising

Where is our dream trustee who can solicit gifts with passion and energy? Unfortunately few board members fit this ideal. One of the biggest myths perpetuated in fundraising is that most board members are willing and able to raise money.

The reality of the situation is that our board members have some very real challenges when they are confronted with fundraising. Their actual performance in this area is quite different from our expectations of them.

While we hope, wish, and dream of board members who will help raise friends and funds, this desire is often based on a myth we are making up in our heads, not actual reality. Let's clearly acknowledge the reality of the situation with our boards—so we can change it—and ourselves. We can play a major role in resolving this problem.

1. MYTH: Board members are willing to raise money, and they accept it as their job.

REALITY: Most board members run the other way when you mention the word *fundraising*. They are in fact quite nervous about it. When I hold fundraising retreats with board members, we have frank conversations about their feelings. They tell me they feel awkward, they don't want to impose on their friends, they don't want to be presumptuous, and most of all they fear rejection.

Quite simply, most of our board members are afraid of fundraising. They are anxious about making calls. They think it is unseemly and inappropriate.

And even when they agree to call a prospective donor, many times they chicken out at the last minute and find reasons to put off that phone call. They often say they will and then they don't. And do you know why? We have not set them up with fantastic training, inspiration, and top-notch staff support.

While many board members are happy to be *friend-raisers*, they don't want to be put in the situation of having to ask for a gift.

It takes not courage alone but also tremendous commitment to tackle something really scary and stick with it. I have the utmost respect for the brave board members who are quite nervous about fundraising but courageously step up to the plate regardless of their fear, because they are so committed to the cause.

What can we do about this? We can't expect board members to be as sure of themselves as we professionals are. We have been at it for years; we are trained; we work hard to learn the best techniques. Our board members usually have none of these advantages.

Most are just well-meaning volunteers, inexperienced and untrained. For us to expect that they can go out and instantly be successful is delusional. We have not educated them properly about the philosophy of fundraising. And we can't expect them to perform until we give them the training and support that they need.

2. MYTH: Board members are active, enthusiastic, and ready to help.

REALITY: Many board members are not sufficiently committed to or involved in their organizations' good work to tackle fundraising. They are not fully engaged in or passionate enough about their organizations to be willing to venture out into the unknown territory of fundraising. In fact, most board members are simply kind-hearted people who want to help their communities and do good works in their spare time.

Engaging board members in fundraising has to start at the beginning—with the quality and involvement of your board itself. Before you even bring up the topic of fundraising, your trustees have to be engaged, active, excited, and involved.

There is a way to get your board members to step up to the plate and not run the other way. You have to get them super-charged up and deeply committed to their own passion—the *change they want your organization to achieve out in the world—the guts of your mission—the ultimate impact of changing or saving people's lives.*

In my Get Fired Up for Fundraising board retreats, we always start with the board members sharing why they care enough to volunteer on this board. We talk about why the mission speaks to their hearts.

When you can awaken your board members' inner passion for the cause, then you have an opening to talk about their role in fundraising. If you go straight to a conversation about "asking," you'll scare them off. Start first by grounding them in their passion and enthusiasm. Why did they join the board anyway?

There is a serious problem when trustees are disconnected from the work and mission of their organizations. We have all seen too many boards with members who are not particularly knowledgeable about their organization or the results it is achieving.

The board members themselves are not necessarily to blame. Trustees are often dissatisfied with their own experience. Talented and high-achieving people, they are typically asked to do low-level, meaningless work that does not inspire action or create commitment, much less tap their real creative talent.

It is time for us to recognize this most important reality about board members and their lack of involvement: If you have a situation in which your board is disconnected or not engaged, then its members will not—repeat, not—tackle fundraising enthusiastically.

They may get dragged into fundraising, but they will not do it with passion, care, and heart. If they are not fired up enough about your organization, they will avoid you when you even mention fundraising.

To be sufficiently motivated to venture into fundraising, these talented men and women need to have the chance to "own" the organization's goals, mission, plans, and challenges. They need to feel that they are active contributors to, and part of, your organization's success.

3. MYTH: Board members understand how to be successful at fundraising.

REALITY: Board members don't understand fundraising at all. They are especially unfamiliar with the full context of fundraising, that of developing long-term relationships for the long run. They make up their own awful stories about fundraising. Unfortunately, many trustees equate fundraising with begging and the unpleasant experience of asking for money.

We know that fundraising is really the entire effort of developing friends/donors/investors/partners who are on our organization's team, willing to stick with our cause for the long run, providing both money and moral support for our mission.

But our board members are stuck, really stuck, in a very uncomfortable place, because the idea of asking for money strikes anxiety and fear into most nice, well-meaning board members' hearts.

Most board members don't know how to be passionate, articulate spokespeople for their organization. Board members do not fully understand their organization, the impact it makes, or its mission well enough to talk about it.

I hear too often from board members that they don't know what to say about their organization. This is our responsibility—we give our board members plenty of materials, but often it is not the right information or is too full of jargon for board members to use effectively.

Again, we can fix this: We need to help them learn what to say—and how to say it. It is up to us to make sure each board member is comfortable with his or her own personal elevator speech—one that comes from his or her heart, not one that is full of marketing messages. When board members speak from their own passion for the mission, they are at their most powerful. We just need to give them practice and encouragement.

Considering their lack of training in fundraising, board volunteers can hardly be expected to be wildly enthusiastic and successful at something they may have never done. They need lots of training on how to approach fundraising and plenty of support to get their jobs actually completed. Fundraising will never be an activity that we can delegate to the board and happily go off on our programmatic way.

4. MYTH: Board members' experience on the board is fulfilling and satisfying.

- **Reality: The role of a nonprofit trustee today is just as likely to be confusing and demoralizing as invigorating and rewarding.** We are not paying the attention we need to our boards as a whole and to their individual members.

The care and feeding of our board members is an oft-neglected art. And I do not say that lightly—it really is an art. Drawing a board member into happy action on behalf of our cause is much like the delicate process of cultivating a potential major donor.

No wonder our board members are not more active. We have to spend the effort to deepen their relationship with our organizations. We can evoke what they are passionate about and fan the flames of their desire to see change happen for the good.

We have to be present, listen to them, offer varying ways they can become involved, and act on their suggestions. It is called cultivating their involvement—just like we do with our donors.

You can create partners out of your board members and have them actively participate and be deeply passionate about your mission and outcomes.

We need to be sure that the *experience* that board members have is worth their time and energy. This experience gets to be meaningful at some personal level. They get to have a sense of offering something of worth to the organization.

If you can create this sense of accomplishment in your board members, then their reluctance to raise money will begin to dissolve.

The Fired-Up Board: Preparing Your Board Members for Fundraising

Just think, how much could your organization raise if you had all your board members engaged in fundraising?

If we want to fire up our board members for fundraising, we first need to fire them up about our organization and the good work we are doing in the world. As we know, a board that is not engaged and excited about the work at hand is not going to put itself out for fundraising.

Let's start at the beginning. How do we fire up our board? How do we reawaken their passion for our cause and reconnect them with the reason they care—so they will happily go out and raise friends and funds for our organization?

Give Board Members a Great Experience. The quality of their *experience* can result in either excitement and energy or inattention and disconnection. We need to give board members such a great experience that they will be engaged enough to tackle fundraising.

Give Board Members Substantive Work. Board members' energy and enthusiasm will be greatly enhanced when we offer them genuine opportunities to deal with issues of real consequence.

They want meaningful engagement in work that matters—not just attending meetings or critiquing the staff's work. We know that if the vision is powerful enough, *it will help to pull them into action and trigger their enthusiasm.*

Show them a possibility to get really excited about. If you can create this, then you will unleash more energy than you thought possible—from the organization and from each individual board member.

Emphasize Specific Outcomes and Results. The best way to energize a group of board members is to focus them directly on the results they need to accomplish. Give them specific jobs that have clear outcomes and a set time frame. Better yet, let them determine what those jobs are, and make their own commitments to deliver results.

The most important question for each individual trustee to answer is: What do I as a board member need to do for this organization in the next six months? Simplifying our focus to what actually needs to be done eliminates the "all talk and no action" syndrome that might creep into your board.

And what do you really need your board members to be doing? Are they more valuable to you sitting in a meeting, or do you need them to be in action out in the world making friends and connections for your organization?

Create Meaningful Board Meetings. Let's bring the passion back to board meetings. If we want our board members to tackle fundraising willingly and enthusiastically, we need to start with their principal point of contact with our organization—the board meeting itself. The meeting is a key moment that can create either enthusiasm or boredom.

The way we typically structure our meetings and agendas can drive the passion out of any organization. Robert's Rules of Order is a major culprit here. This traditional system may create a balanced, democratic format for running a meeting, but it can also be your enemy. Parliamentary procedure is not known for creating a sense of urgency, enthusiasm, or commitment to correct serious problems in the world. (See “Ways to Liven Up Your Board Meetings—and Your Board” to the right of this article for some ideas.)

Energize Meetings with Mission Moments. Give board members a set of vivid, very personal encounters with your organization's work—and with the lives that are being changed or saved in the process.

Demonstrate, beyond the power of words, the real meaning of our efforts to fill urgent human needs. Mission moments are the most powerful reminder of the reason an organization exists; they are also reminders of the reason a board member is spending his or her time in service.

We all know the power of testimonials and personal stories. Just as *donors* are moved by real stories to make gifts, *board members* are moved to action by those same experiences.

Every time there is a significant gathering of board members, bring those who benefit from your organization's work to meetings and let them share their experience directly with your board members. Or take your board members on a field trip to see your organization at work in the world.

Invite Board Members to Share Their Personal Stories. The most powerful conversations occur when board members share among themselves why they care enough to serve on the board.

I always begin my Easy Fundraising for Board Members Retreats with a simple—but very powerful—question. I ask board members to share why they care about this organization.

It is a surprise move: board members are rarely asked to share personal perspectives. *I contend it is more important to have them talking about their personal passion for the organization's work than it is for them to hear report after report.* You may be amazed to find out what people believe in.

This is the conversation to have over and over with your board members. Help them remember what they all care about the most, and you can quickly reinvigorate even the most routine meeting.

Create a Sense of Community and Collegiality. Social time helps develop healthy relationships, teamwork, and a sense of collegiality among board members. Remember that your board members want to meet each other and make new business and social contacts.

If they are all strangers to each other, how can they work effectively as a group to make wise decisions guiding your organization? Scheduling social time among board members is an absolute must that is too often ignored in the effort to use board members' time expeditiously and wisely. Often the casual conversations that occur during breaks or lunch foster deeper discussions of important issues as well as closer relationships among board members.

When the board members share this sense of friendship, they create a positive atmosphere that fosters trust and respect for each other. When your board members feel they are all in this together, then they will be more willing to put their shoulders to the wheel and raise money.

Name Tags Are Absolutely Essential. Name tags should be required for every board function, if you want to help your board members get to know each other. Providing name tags is simply good manners. There is no excuse for ignoring this essential aid for your board.

Help Your Board Members Enjoy Themselves. Life is short, and volunteer hours are precious. Board members should have an experience of actually enjoying their volunteer time with you. There is no rule that says nonprofit work has to be dreary.

If your organization can offer pleasant social experiences, your board members might come to meetings not just out of duty but also out of enjoyment. And happy board members who are enjoying themselves will work more effectively together as a team.

Fun is not what board members expect—but it brings energy and excitement to your cause.

Conclusion

We can all—board members and staff members alike—take more responsibility where the board is concerned. If we choose to make the effort to fire up our board, we will be rewarded with trustees who are active, interested, and much more willing to tackle fundraising.

Four Steps to Take Board Members from Fear of Fundraising to Enthusiasm

If you want to get your board members fully active in fundraising, you need to approach them from a new perspective. You have to change their mind-set about fundraising and redefine it from an entirely new point of view.

Board members don't understand how powerful the act of raising money can be—it's an effort to make the world a better place. It is some of the most important work anyone can ever do—on the front lines causing change for the good.

But board members don't think of it that way. They are stuck in the "tin cup" attitude—equating fundraising with begging. Instead of the highest form of human activity—helping their fellow man—they turn it into one of the lowest.

Here are four steps to take board members from fear of fundraising to *understanding* and to open the door for *willingness*. These steps give them a whole new perspective about raising money that is far more empowering and inspirational.

Step One: Deal Directly with the Dark Side of Fundraising

Fundraising can bring out nervousness, embarrassment, or anxiety. These feelings arise when the conversation is all about *money*. We know that many trustees equate fundraising with "asking strangers for money."

We must deal directly with their fears. We should give them the opportunity to get over their mental blocks by having an honest, open discussion about their nervousness or anxiety about fundraising. They also need a special environment, probably a retreat, to encourage them to let go and speak freely.

Please note that I am not saying that *you* should talk to them—I am saying that you need to allow *them* to talk about how *they* feel.

Ask them: "**How do you feel about soliciting and asking for money?**" In my Easy Fundraising for Board Members retreats, I pair board members off and ask them to share with each other how they really feel about fundraising and soliciting.

I encourage them to get all their bad energy about fundraising out on the table. I encourage them to throw up if they want to. They will say they feel nervous, fear rejection, don't like prevailing on people, and think it's demeaning. They lay it on the table.

But I don't let them linger in the "yuck" of asking. I counter it immediately with a discussion of how they feel when they give.

Step Two: Tell Them Fundraising Is *Not* about Money

It's about changing the world.

Ask them: "**How do you feel when you write a check to your favorite organization?**"

Here's what they will say: I feel proud ... joyous ... glad I could do it ... wish I could do more ... happy ... giving back ... part of something important ... powerful.

Then remind them that these are the emotions other donors feel when they give money. When a donor makes a gift, he or she becomes a partner in a cause that is bigger than just one person's life. That donor's life and legacy are enhanced. To work for important purposes, to take part in solving problems of great magnitude gives deeper meaning even to daily routines. People want to be involved in something with meaning.

So instead of being embarrassed about fundraising, board members can shift their perspective and realize that donors are happy and joyful when they are giving. Here's the disconnect: they can be stuck in fear—all focused on themselves—or they can be all about the donor and their shared experience of wanting to change the world.

Board members can stand high on the mountain making the world a better place. I tell them that they need to be fired up with their passion to change the world. They can be like Martin Luther King.

I suggest that they should be going all over town saying, "I have a dream ...," and infecting everyone they meet with their joy, passion, and urgency to help others in need.

Board members like this point of view. You can see them shift right before your eyes. Putting fundraising on this high a plane is a new idea to them. It puts them at ease and gives them fresh inspiration and energy to take action.

They are relieved when I tell them that good fundraising is *never* about money. It is all about the desire to improve your community or world for the better.

Americans come from a barn-raising tradition, one of neighbors working together to solve problems, rather than relying on government to solve most of them. This tradition creates deep, fertile ground for our fundraisers today.

Step Three: Seek Friends, Not Donors

Board members are stunned when I tell them that after 22 years on the front lines of fundraising, I would rather have a friend for my organization than a donor.

What will your friends do for you? They will be interested in what you are up to, they will stick with you, they will help you out, they will spread the word, and, when the going gets tough, they will be there with you.

Donors *want* to be drawn into the real work of the organization, anyway. They want to be treated like real people and not wallets. What better job for board members—to make current and potential donors into true friends of the organization?

The more friends our board members can make for our cause, the stronger and more successful our work will be. The larger the number of people who have been personally introduced to the work we do, the better we fare.

It is easy to assume that the real work is the direct solicitation of funds, but "the talking up" part of the job is equally important. If a nonprofit is a bright spot on its community's radar screen, so to speak, then that visibility will make the fundraising so much easier and more successful.

Community buzz is so important. As fundraisers, we really need our board members to be active in the community on behalf of our organization. *Active* can mean lots of things: talking up the organization; introducing new people to its work; bringing in friends and volunteers to help in different ways; and, yes, helping to acquire money and resources.

Friend raising is something all board members like to do and are proud to do—and it is a *most* valuable and needed fundraising function. If you set up a committee and call it the Friend Raising Committee, board members will probably be enthusiastic, and the effect of the group's efforts will be powerful and lasting.

Step Four: Tell Them They Don't Have to Solicit

Let us focus our board members on friend raising and many other jobs in the fundraising process. I say we take soliciting out of the picture and get our board members hard at work developing friendly relationships for our organization all over the community, state, region, world—wherever our mission takes us.

There are so many activities related to fundraising (outside of soliciting) in which we need their help. For those on a board who are not ready to take on solicitation, we can ask them to do everything else in the fundraising cycle: help create new friends and supporters, help thank and involve current donors.

Our fundraising cycle starts with identifying potential donors, then cultivating, engaging, and involving them. When they are ready, we ask for their support, and finally we thank, thank, and thank them again so they will join our bandwagon and be our friends for the long run.

Smart staff members can show board members all the other ways they can contribute in fundraising without "asking." They will begin to see just how little time is spent in the "asking" phase of the cycle, compared with all the many other activities we undertake with our donors.

They need to understand that fundraising is very much more than simply soliciting. Developing a relationship with a donor, particularly for a major gift, is a lengthy process with many delicate steps.

Board members can help in the other myriad activities of the process, when we are simply making friends and building relationships, which of course leads to giving, and long-term giving, at that. Board members can host tours, throw parties for their friends, create community buzz, ask everyone they know for help, and personally thank donors.

As experienced fundraisers, we know that the more emphasis we put on cultivating, thanking, and informing donors, the easier, and more natural, the "asking" will be.

Of course we know that if board members are actually involved in helping to cultivate a donor, then they will be much more willing to help with a solicitation. There are many vital tasks that they can perform, without having to solicit. *They can serve at all levels and get as close to or as far away from the actual moment of solicitation as they want—and still make a huge difference.*

This is really an eye-opener for many board members. When I present these suggestions in retreats and trainings, I see amazed and interested expressions, as if an entirely new idea is dawning upon them. This is the way to take your reluctant board members and fire them up with new energy and enthusiasm for the cause—and put them to work.

No-Ask Fundraising: Six High-Impact Jobs for Board Members

How do we harness our board members' passion for the cause and channel it into productive fundraising activities?

Here are practical, easy ways your board members can open the door, connect their friends to your organization, expand your organization's social networks, and help you find new friends and donors—without having to solicit.

1. Make Friends for the Cause

We need to capitalize on our board members' personal social networks to further our organization's urgent work solving community problems. So the job is clear: we have to ask our board members to *introduce our organization to everybody they know.*

Your board members need to be roaring *advocates* for your organization; they need to talk about it wherever they go. They should be all over their friends, telling them *why it matters* and urging them to get involved.

Actually, you want your board members to start an epidemic—of ideas. Ideas are like viruses—they spread from person to person.

Your board members can launch an epidemic of good news about your cause that will spread through your community. I teach board members how to be sneezers—conveying excitement about our cause everywhere.

This is the essence of viral marketing. Word of mouth can do marvelous things for a nonprofit cause. It creates great community buzz.

When everybody in the community is talking about your project, fundraising then becomes a natural outgrowth of all the energy and enthusiasm generated for your cause. This kind of visibility and background PR is absolutely essential for good fundraising.

2. Identify Your Organization's VIP Friends

Who are the important people who could affect your organization's future? Who should be on your radar screen? I call them VIPs—for Very Important Prospects.

These individuals may be civic, political, philanthropic, religious, corporate, or social leaders in your community. They may also be among your current donors or on your prospect list.

They are important opinion leaders who can influence many other people. The VIPs may also be the "sneezers" in your community, easily spreading the news about your organization.

Compiling this list is a great job for board members. When trustees tackle this job, they naturally begin considering who knows these people and how to open the door to them. They start prioritizing the list and creating strategies to cultivate closer relationships.

This is getting board members involved at the very beginning—developing our organization's key prospect list and looking for ways to open the door.

3. Open the Door with Advice Visits

We all know that within our board members' social networks there is a gold mine of potential friends and donors. But how do we help them open the door to these contacts? What is a "nice" way to introduce their friends to their favorite cause? A soft-sell way that is "low pressure but high intention"?

A personal one-on-one meeting is a wonderful way to introduce a person to your organization or cause. It's an "Advice Visit," because that is truly what we are after—advice.

Advice Visits are based on the old fundraising adage "If you want money, ask for advice. If you want advice, then ask for money." They are treasure hunts, because when you get together personally with someone for an exploratory conversation, you are not certain what you will find. But you always end up making a friend for your cause.

This is a perfect opportunity for a board member to promote your cause in a direct, personal way. Our only goal for visiting this person is to ask them what they think of our project and ask for some serious guidance. This visit is emphatically *not* about money.

People are usually flattered when someone approaches them just to ask for advice. *You would be surprised at the number of doors that will open if you just ask for advice.* People *want* to help nonprofit causes, because they care about their communities, their country, and their world.

Board members love Advice Visits because the other person does the talking. They are relieved that they don't need a detailed presentation. The important points are to share their personal passion and excitement for the cause and why they are personally involved. Here are questions to ask:

- What do you think about the project?
- What about the need in the community?
- What interests you personally about the problem we are addressing?
- Who else would be interested in hearing about this?

4. Gather Friends with Small Socials

You can expand your community relationships and make friends fast through "Small Socials." This job is perfect for social board members who have many friends and like to host gatherings.

A Small Social can take several formats. It can be a coffee, a tea, dinner, or cocktails. It can be breakfast meetings or luncheons. It can include 3 people or 100.

A Small Social must follow these rules:

1. A board member or volunteer invites people to it and hosts it.
2. There is no charge.
3. It is a *cultivation* event designed to fire up people about your cause.
4. A plan is in place for following up after the event.

If you don't have a follow-up plan, don't do the event at all. (See "Following Up on the Small Social or Tour" at the end of this article for more information.)

Small Socials always have a short presentation in the midst of the socializing. The board volunteer host should welcome everyone with a few words from his or her heart sharing why he or she cares about your organization. This welcome is very powerful because it is the host's personal story, which often has more impact than a formal presentation.

Then the CEO steps forward with a high-impact message about your organization. This is the CEO's—well, actually, your organization's—chance to shine. Think passion and urgency. Think Martin Luther King's "I have a dream" speech—full of vision and inspiration, with a clear call to action at the end.

5. Become a Tour Guide—And Show How We Change the World

Board members can host tours to bring prospective friends closer to your organization. A carefully scripted tour can be a powerful way to demonstrate your organization's good work and to illustrate unmet needs in the community.

The tour lets your work speak for itself. Your guests will hear staff members or even clients/students/stakeholders express in their own words their personal firsthand experiences with your organization's mission—and the good it does—in the community.

A well-planned tour has many of the same components as the Small Social. It has the board volunteer host's welcome, the CEO's visionary message, and the same follow-up card and phone call.

6. Acknowledge Donors' Generosity

One of the most powerful actions a board member can take is to phone to thank a donor soon after his or her gift is received.

When board members call to thank donors, the donors receive a very powerful message. They think: "This organization appreciates me," "I am a real person to this organization, not just a checkbook," "This organization is well run."

Donors who receive phone calls from board members invariably tend to give larger gifts the next time and tend to stay on board as donors longer.

Some studies have shown that donors who were called by board members within 24 hours of making a gift later made gifts that were 37 percent higher than those from donors who did not receive a call. This means that board members can directly improve your organization's bottom line without having to solicit!

Conclusion

Every board member can support your organization's fundraising—without ever asking for one red cent. There is a fundraising role for each person on your board. In my board retreats we often end by asking each board member to sign up personally for one or two of these jobs, and they are happy to do so.

Gail Perry, July 2008

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Following Up on the Small Social or Tour

"What Were Your Impressions?"

After board members host a Small Social or tour of your organization, they should call guests to ask, "What were your impressions of our gathering?"

This magic question is the *golden key* to finding out what is going on inside your prospective donors' hearts and minds. It invites them to consider the message they heard at your event and process their personal thoughts about it. It gets them involved in your cause. It gives you the information you need for a next step to bring the person even closer to your organization.

The Follow-Up Card

Also ask guests to sign a follow-up card that captures their contact information and lets them check off possible interests. The follow-up card lets people "self-select" to get further involved. Be sure to include these questions on your follow-up card:

What most interests you about our organization and our mission?

Would you like to:

- Join our mailing list?
- Host a small social or tour?
- Make a contribution for \$_____?
- Volunteer?
- Other _____?