

Three Vital Questions for Your Board

If your board doesn't know the answers, you need a new way to give them information.

By Gail Perry

Do your board members know the answers to these three fundamental questions?

Question 1. Where does our money go?

Question 2. What's our top program area, and why does it cost what it does?

Question 3. What money do we need to spend right now to carry out our work?

You probably think your board members know the answers by heart. The truth is, they most likely don't.

It's not that you haven't given them the information. You've presented your fundraising plan to your board time and time again. But have they heard you? Do they grab on to the information with excitement? Are they so bought in to your plan that they're dying to help out?

Or do their eyes glaze over? Do they seem to listen without hearing? After you make a presentation, do you feel let down when there's no discussion or enthusiasm?

If you ever feel such a letdown, the problem isn't the information you're presenting. It's the format you're using. You've got to find a new way to present fundraising information to your board. You urgently need a different format that will engage them.

Here's a form of presentation that's been proven to work for adult learners, who can be hard to reach. It breaks

the information into small bite-sized chunks. It merges fundraising and finances together. It creates a fascinating discussion for your board members. This discussion will bring your fundraising goals alive in a way you never thought possible.

A New Format: Try a Question and Answer Interview

Here's what you do: Interview your executive director in front of the board. Or if you're the executive director, interview your top program officers or knowledgeable board members.

Sit down together as if you're the host and guest on a TV talk show. Ask questions and draw out answers from your interviewee. Your goals are to be casual, go slowly, and focus on the three key questions. You want to generate a real give-and-take discussion about those questions. The board members have to chew on this content in order to actually get it.

Ask your interviewee this series of questions.

"OK, now what's our annual budget?"

Now this is a no-brainer question, right? You've drilled this into your board members' heads, right? Wrong!

Your board members are sitting there listening, and they're thinking to themselves, "Do I know how much our budget is?"



They're eager to hear what your interviewee says. Their brains are suddenly primed to want the answer. When your interviewee answers your question, they listen carefully.

Then ask:

“OK, how much do we need to raise every year?”

Board members are wondering, “How much *do* we have to raise every year?” They're suddenly curious to know the answer.

Then ask:

“How much can we count on bringing in every year, and how much do we have to bust our butts to raise?”

This is when board members sit up in their seats. This gets their attention. They can't wait to find out this amount.

Next, switch to your programs and ask questions like these:

“What's our top program area?”

“How much does it cost?”

“Why does it cost so much?”

“Where exactly does the money go?”

“Why does it take so much staff to do this work?”

“How many people are we helping in this program?”

“About how much does it cost per person helped? (Or per center that you operate – or other measure relevant to your operation.)”

“What else does this program need? And how much would that cost?”

“Why do we so urgently need to make these new investments to carry out our work?”

“Can you tell me a story of someone whose life was changed through this project?”

“What would we do if we had an additional \$100k? (Or \$50k, or \$500k or million – whatever is relevant to your budget size.)”

An Example

I follow this format every time I facilitate a board retreat – and get amazing results. Here's an example.

I was working with a hospital foundation that had some of the wealthiest people in town on the board. The board president and I sat down in front of the board members, and I began interviewing him.

I asked him: “What investments do you need to make here at the hospital?”

He said he needed a certain medical testing technology that cost a million dollars.

I asked him why he needed this technology. He said that when a patient at the hospital needed this test, they had to ambulance the patient across town to another hospital. He

said he was worried about medical outcomes for the patient who had to be transported.


You should have seen the board members. They were staring at him in rapt attention. They started asking questions. They were taking notes. (When your board members start taking notes, you'll know you're providing good information to them – information that they really want to know.)

It was a pivotal discussion for this group of powerful board members. Then at the break, guess what one board member said to the board president: “I think I know where we can get the million dollars for that technology.”

The Magical Discussion

Here's what happens when you use this format to lay out details for board members: You arm them with the exact information they need to raise money. You take the discussion *away* from “How much money do we need to raise?” You create a new discussion called “What do we need to do for the cause?”

You position fundraising in terms of people. And you can create magic with this discussion.

Try this format and you'll create something new. You'll engage your board members in both your finances *and* your fundraising. You'll bring alive what you usually present in boring reports and presentations. And you'll fire up your board members for fundraising! 



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