Strengthen Board Member Solicitation Skills

To understand why board member solicitation can make or break fundraising efforts, consider the assertion of Jim Lyons, senior partner at Pride Philanthropy (Alpharetta, GA), that board members are five to 10 times more likely to get appointments with potential donors than development staff.

"It's easy to turn down a professional fundraiser. Their job is to get turned down," says Lyons. "But when a volunteer who is giving their own money to an organization calls and says 'This is really important, and I'd like to tell you about it,' people will usually make time to listen."

Lyons answers questions about the all-important task of creating competent and confident board member solicitors:

What is the biggest obstacle to effective board member fundraising?

"It often goes back to how they were recruited. All too often we are so focused on recruiting toward yes that we end up downplaying critical fundraising expectations. It gets us board members, but it sets our organizations up for failure."

How should fundraising expectations be communicated to potential or new board members?

"They need to be told there are different ways to help. Some people are good at identifying prospects, some are good at telling an organization's story, and some don't want to set up appointments or take hard questions, but are willing to look someone in the eye and make the ask. No one has to do all three, but all board members should know that they are expected to be contributing in at least one area.

How should development staff assist board member solicitation?

"They should first of all help board members develop a prospect list of three to five contacts. (Any more will look like a job and the board member won't do it.) They should prepare the meeting materials, should expect to do much of the follow up, and can, according to the board member's preference, attend meetings to answer detail questions and supply statistics. But they should never set up the meeting. If a staff member calls to make an appointment on someone's behalf, it defeats the whole purpose."

What should board members know about closing solicitations?

"There are three keys. First, make sure you always ask for a specific amount. When you offer a range, people will always migrate to the bottom end. Second, when you have made the ask, just be quiet. It can be hard to sit through the silence, but if you start talking, you'll often be talking them out of the gift. Last, make sure there is a specific follow-up plan that leaves the ball in your court—something like 'I understand this is a big decision. Tell me when you would like us to follow up with you.'"

What would need to be included in training to build board members' solicitation skills?

"It's nice to have a meeting strictly devoted to solicitation training. You will want to do some role play and practice in the meeting— pair everyone up so they are not performing in front of each other, but have each member play both the solicitor and the donor. People will resist, but they always say it was helpful after the fact."

How do you establish an ongoing culture of board member fundraising?

"It starts at the top. It needs to be an ongoing CEO message and needs to be an important part of board member orientation and training. It's a process that takes time. You can't just send a memo and say you've established a culture of philanthropy. It requires long-term commitment."

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