What's the Right Role for Board Members in Major-Gift Fundraising?

We need board members in a role only they can play.

By Gail Perry

Where do board members fit in the major-gift fundraising process? Many board members worry they'll be asked to do face-to-face soliciting. But that's not it at all.

We need board members in a different role. Why? It's because major gifts require a much different approach than other types of fundraising. Major-gift asks must be carefully choreographed and planned out. These asks don't happen in one conversation. The gift discussion happens over weeks and months.

For these important asks, board members are involved only if they're the right people to do the asking, and that happens rarely. Instead, here are the vital roles board members can take in major-gift fundraising:

> "The gift discussion happens over weeks and months."

> "Major gifts require a much different approach."

Be on the Lookout for Potential Donors

As a busy board member, here are some specific things you can do to put your time to best use while helping to secure large gifts:

Always be alert for people who might have financial capacity and a strong interest in the organization's work. Talk about the organization with everyone you meet and notice whenever someone's eyes light up with interest.

Help review and screen lists of prospective donors. Host screening sessions with small groups of donors to identify prospects.

Be a good detective for the organization, constantly looking for true believers – donors who are wildly passionate about the organization's mission and who want to get more involved.

Host VIP Cultivation Events

There's a lot of power involved in pulling donors together for VIP cultivation events. These small social events can take many forms: porch parties, picnics, cocktail parties, fireside chats, meet and greets, lunches, dinners, all types of small gatherings. Such get-togethers are powerful tools for identifying and engaging with potential donors.

This is an important role for you as a board member. You can:

Graciously host events, and invite your network of contacts.

Attend events hosted by others, and bring a few interested friends.

Provide names for the invitation list and help get out invitations.

Help underwrite the cost of food and drinks.

Engage with guests and help staff work the room at events.

Share your story of why you care.

Ask guests to share their own stories, and listen for indications of strong interest in becoming donors.

Ask Only When Cleared to Ask

Fundraisers carefully plan their major-gift asks. They thoughtfully decide when and where to hold the ask, who should go, who should be asked, how much to ask for, and for what project. They script out the ask. They warm up donors by asking if they're ready for this type of discussion. A lot of preparation and deliberation undergirds major asks.

No one should ever make an ask unless they're cleared. The strategy team will decide if it's the right time and whether a board member is the right person to make the ask.

Board members who don't understand the delicate asking process can cause damage by moving to an ask too quickly. Sometimes the donor takes it as an affront, and the donor relationship is seriously compromised.

But that doesn't mean board members aren't an integral part of the fundraising process. They're perfect in the role of finding like-minded people and sharing their zeal for your organization's work.

Gail Perry Group inspires nonprofits around the world with cutting-edge fundraising strategies and new tools to make fundraising more successful and more fun. Find smart strategies to help you raise tons of money at gailperrygroup.com.

The Joy of Asking

These articles at NonprofitWorld.org provide many more ways your board can help you secure major gifts:

Listen Your Way to Major Gifts: Power Questions Your Donors Will Love (Vol. 39, No. 3)

How to Impress the Wired Wealthy (Vol. 30, No. 3)

Getting Comfortable with the F Word: Fundraising & the Nonprofit Board Member (Vol. 20, No. 4)

Debunking the Myth of Bill Gates: Finding Major Donors (Vol. 16, No. 2)

Your Board Can Help You Gain Major Gifts (Vol. 39, No. 2)

What's the Best Way to Recognize a Major Donor? (Vol. 31, No. 2)

Turning the Direct Ask into Gold (Vol. 30, No. 1)

Top 10 Trends: How Major Donors Are Changing & What to Do about It (Vol. 31, No. 4)

Is There a Role for Your Board in Raising Funds? (Vol. 23, No. 3)

Why on Earth Would a Major Donor Agree to Meet with You? (Vol. 41, No. 1)

What to Do When Your Potential Donor Says No (Vol. 36, No. 3)

The Perfect Gift for a Major Donor (Vol. 36, No. 1)

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