

Make Your Meetings with Board Prospects Count

Use these tips to be sure you don't lose a great board member.

By Terrie Temkin

Don't take the chance of losing a great board director because you let the niceties – or even the essentials – slip through the cracks. Increase your impact on potential board members by following these steps:

1. E-mail each contact and explain that (Name) referred them to your organization. Explain a bit about your organization. Tell them that you'd appreciate having the opportunity to meet with them. Say that you'd like to see if their skills and interests might fit and if they'd be interested in getting involved.

Add that you'd also welcome the names of others who might be interested. Note that you'll follow up on (Specific Upcoming Date).

2. Call on the date you specified, and say that you're following up on the e-mail you sent. Ask for a date that you can meet. Set a specific time and place. Ask if they would please send their resume or bio so that you can better prepare for the meeting.

3. Immediately e-mail or mail a short descriptive piece or two about your organization. Include a cover note indicating your appreciation for their willingness to meet and reiterating the time and place.

4. At the meeting, begin by asking if the prospect has any questions. Fill in a few key facts about your organization and its successes (keep to a maximum of three minutes). Share with them the ways that you use volunteers, including the board.

You may indicate that there are high expectations of those serving on the board and that if this is something that interests them, it would have to be a top priority in their lives. If they still express interest in the board, tell them that you'll send them a job description.

Ask a few well-thought-out questions. Ask for their questions and the names of any others you should follow up with.

5. Send a quick “thank you for meeting with me today” note when you get back to the office. Remark on something you learned that intrigued you. Let them know when you



expect to get back to them. Welcome their questions in the meanwhile.

6. If you decide this is someone you want on the board:

Make sure you've sent the person a job description explaining what a board role will include and listing board member responsibilities. Also explain what board members receive in return for their service.

Call and express the desire to get to know the person a bit better. Invite the person to your center for a tour.

At the tour, introduce the prospect to a couple people who know the program and what it has accomplished. Ask questions about the person's interest in and capacity for serving. If at the end, both of you are still interested, ask the person to join the board. **S**

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