

eJewish Philanthropy

A Guide to Being a Good Solicitor

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A Guide to Being a Good Solicitor: Fundraising is All About People

During the last several weeks I have had multiple conversations with people about what makes for a good fundraiser. I have participated in a series of discussions about the importance of engaging with people. Although there is a great deal of pressure to receive a pledge for a contribution or the contribution itself, one cannot forget that the focus needs to be on the potential donor and not on the person's financial situation. So, what does this really mean and how do we engage with people to bring them closer to our non-profit organization.

I would like to present a number of steps that will assist professional and volunteer solicitors when they are soliciting donors.

1. **Knowing the Donor.** It is very important to learn as much as possible about the donor. Today it is not difficult to find out background information about people. Through any number of websites biographical information can be obtained that will assist the solicitor in beginning a conversation with the potential donor. The fuller the picture the solicitor has about who the donor is and what his interests are the greater the chances of engaging him in a conversation.
2. **Identifying Possible Areas of Interest.** Once background information has been gathered it is important to identify areas of overlap between the donor's interest and the services and programs provided by the non-profit organization. This will enable the solicitor to connect the donor to the agency and the way it is working to strengthen the community through the delivery of its programs and services.
3. **An Introduction.** One of the essential elements of a successful connection between the donor and the solicitor is the how they meet each other. The best approach is for someone who knows both the solicitor and the donor to introduce them to each other. This is accomplished in any number of ways including: an informal meeting at an event; having a cup of coffee together; having lunch together at the invitation of their mutual acquaintance; or any other number of ways. The solicitor can use the informal introduction as a way to begin a relationship with the donor and to suggest that they meet to discuss mutual interests (based on points 1 and 2 above).
4. **Understanding and Using the Process.** Soliciting donors is a process that takes place over time and it is not something that is necessarily accomplished during a single meeting. If the solicitor is successful in developing a connection with the donor then there should be a number of conversations. During these meetings the solicitor engages the donor in a discussion of the donor's philanthropic interests as well as how they connect with the agency's programs and services.
5. **Developing a Perspective on Soliciting Support.** The solicitor needs to have a sense of the purpose of engaging the donor. Oftentimes solicitors feel uncomfortable about

“asking people for money.” I have heard many people say, “How can I ask someone for money?”; “How can I put my hand into someone’s pocket?”; or “How can I tell someone else they must give money?” Personally I have developed a perspective that soliciting provides the donor with a unique opportunity. When a donor is approached she is being given an opportunity to join a partnership with the non-profit organization that represents her interests. She can decide whether or not she wants to become a partner in the venture. However, if she is not approached then the decision is being made for her that she is not interested. In this way, soliciting people is a process of empowering both the donor and the agency.

6. **Experimenting with Simulation Exercises.** A very effective training tool is to have the ability to experience what it will be like to meet and engage with the donor. This can be achieved by utilizing any number of role playing exercises. This way experienced staff and volunteers can share their experiences over the years with donors with the new solicitors. Thus, the new solicitors learn how to approach donors and avoid major mistakes as they develop their skills in engaging people.
7. **Mentoring the New Solicitor.** When new solicitors begin their work (and even veteran minors) they need to be able to reflect on their experiences and to discuss them with senior solicitors. The seniors should be able who can respond to questions and offer support. They should provide encouragement as well as identify mistakes that the solicitor may have made during the solicitation process.
8. **Enjoying the Experience.** The successful solicitor enjoys the involvement in the process and experiences engaging with donors as a unique opportunity. The solicitors experience is contagious and when people have a sense of what this work means to the person fundraising it encourages them not only to get involved in the area of financial resource development but also to have a sense of ownership in the process.

These eight steps provide a direction for those interested in being involved in leading the road for successful fundraising. It is an exciting process and it brings new people into the world of the non-profit organization by engaging them as partners. This way both the solicitor and the donor benefit from their work together.

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