

Train Your Board to Ask NOW

Adapted from a new book,

TRAIN YOUR BOARD



(And Everyone Else) To Raise Money

by Andrea Kihlstedt and Andy Robinson

www.trainyourboard.com

GETTING STARTED AS A TRAINER

Each exercise in this book includes a tip to help you develop your training and facilitation skills. The following suggestions apply to all the exercises and are frankly applicable to almost any situation where people gather to learn new skills and learn from each other.

1. **You don't have to be an expert.** Sure, it's easier to train people to raise money if you know something about fundraising, but most of these exercises are designed to work with trainers (and audiences) of any skill level.

If you're asked a question you can't answer, it's perfectly fine to say, "Martha, that's a great question. I don't know the answer." When in doubt, remember the old trainer trick: pass it back to the group—"Who has a good response?"

If you're a novice trainer, it's useful to acknowledge that: "This is my first time leading this exercise, so I'll need everyone to help me out, okay?"

2. **Honor your need (or not) for preparation.** Some people prepare rigorously before trying something new; others jump in. We've done our best to design these exercises for people who land anywhere along the "preparation continuum." If you need to thoroughly prepare in advance, please do. And if you're comfortable opening the book, reading an exercise, and facilitating it in real time, go for it.
3. **People remember what *they* do, not what *you* say.** This is the heart of adult learning theory, which is why this book is a series of activities, role plays, and games, not lectures or PowerPoint slides. As noted earlier, you don't have to be a fundraising expert to lead the exercises—you just have to facilitate the group.
4. **Pay attention to logistics.** The success or failure of a training event depends, in large measure, on people's physical comfort.
 - If possible, *position the chairs so people can talk to each other*—around a table, for example—rather than classroom style or in a

large U with people far apart. For many of these exercises, an informal circle of chairs will work well.

- *Choose a room with good light*, preferably natural light.
- *Set the thermostat* to a comfortable temperature. If you're concerned, poll the group—"Is anyone else cold?"—and adjust accordingly.
- *Create good sight lines* so people can see what you're writing on the flip chart.
- *Avoid glare*. Never have the audience facing large windows during the daytime. You (and your easel) will be backlit and difficult to see.
- *Use big markers that don't smell*. Some markers are pretty toxic, and your colleagues may have chemical sensitivities.
- *Write visibly*. Use letters that are large enough so everyone can see clearly. Not sure how big is big enough? Write something, then sit in the farthest chair. Can you read it easily?
- *Use red, pink, orange, and yellow only as accent colors*. They aren't as visible as blue, green, brown, purple, and black.
- *Speak up*. Project your voice. Make it carry. Learn to speak from the core of your body, rather than relying entirely on your throat. Ask everyone else to speak up, too. If the room is large and acoustics poor, you may need to repeat questions (loudly) so everyone can hear them. If you anticipate that people will have trouble hearing you, get a microphone.

5. **Keep things moving: the pace and the people.** If you're a new trainer, you may feel the desire to answer every question and pursue every tangent. We've designed these activities to make it easy to stay on task, but people sometimes raise unrelated topics. It's your job to address people's concerns while keeping the group on track. You can always say, "Let's complete the exercise and then discuss that question when we debrief it together at the end."

If you want to add energy, give people the chance to move. For example, if the exercise calls for work in pairs, encourage everyone to stand up, move around, find a partner, and spread out around the room.

6. **Be supportive.** Reinforce your colleagues by saying things like "What a great question" and "That's a really thoughtful response." Don't be dismissive or make people feel like they're asking dumb questions.

If your group is brainstorming ideas and suggestions, include them all as you write notes on the flip chart. If you selectively include some comments

and leave others out, people will feel disrespected and will hesitate to offer more ideas.

7. **Listen to the group and trust where they want to go.** In some ways, this is a contradiction (see item 5 above), but the best facilitators can sense when it's time to follow the group away from the agenda and into the work they really need to do. On this topic, it's best to trust your instincts. If it feels fruitful, go there; if not, stick to the agenda. If you decide to veer off the agenda, make that decision transparently and redesign the agenda on the spot.
8. **Gimmicks are good.** After years of shouting, "Can I get your attention?" Andy finally bought a bell and a train whistle—and they come in handy. Another trick is to make the exercises competitive (several are designed this way) and give out prizes. "The small group that brainstorms the most items in the next three minutes will win a fabulous prize." This always increases the energy level in the room. Note that the best "fabulous prizes" are often inexpensive and silly.
9. **Debrief everything.** Every activity, game, exercise, and contest in this book includes a debriefing: a chance to sit together when it's over and ask, "What did we just learn? How do we apply it?" Sharing these lessons clarifies the value of the exercise, integrates the knowledge, and helps everyone figure out how to apply it. We encourage you to trust the lessons that emerge during these conversations, even if they are not the ones you anticipated at the start of the exercise.
10. **Share the wealth, share the power.** The activities in this book provide an excellent opportunity to develop leadership skills. Once you've facilitated a few of these exercises, encourage your colleagues to take turns at the front of the room.

Feel free to share your stories by sending us an email or visiting our websites:

andreakihlstedt@gmail.com
www.andreakihlstedt.com

andy@andyrobinsononline.com
www.andyrobinsononline.com

Have fun—enjoy yourself!

For more board training material, visit www.trainyourboard.com.

Why Do You Care?



The best board members serve as ambassadors, spreading the word about your organization and its work. When they know what to say, they'll talk more readily with their friends, neighbors, colleagues, and even donors—more readily and more often.

To fill this ambassador role effectively, board members needn't memorize the mission or learn an elevator speech or rehearse the key points of the strategic plan. They just need to articulate why they care. Once they've voiced this, they'll never forget it. And nothing is more powerful than a statement of their own personal commitment.

In addition to finding their own passion and the words to describe it, those who participate in this exercise will come to know each other better, increasing their sense of community and camaraderie.

Why Do This Exercise?

Storytelling is at the heart of fundraising, and people need to be encouraged to tell their stories and the story of your organization

Use This Exercise When

You're building a fundraising team or bringing in new board members or volunteers

Time Required

10 to 15 minutes

Audience

Your board. This exercise also works well for staff and key volunteers.

Setting

A room large enough for your board to move around and mingle. If the weather's nice and you have a reasonably quiet location, this activity works well outdoors, too.

Materials

- Stopwatch and timer
- Bell or whistle
- Paper and pens

FACILITATING THE EXERCISE

1. Hand out paper and pens and ask the following questions:

- What would you say if someone asked why you cared enough to serve on our board?

- What moves you—really moves you—about our organization and its work? How would you talk about that with other people?

Tell them they will soon share their responses with four other board members and give them a few minutes to make notes.

2. When they've finished writing, describe the exercise as follows. "When I say to begin, please stand up and find a partner. If you don't know the person well, introduce yourself. Then take about thirty seconds each to tell your stories. When I ring the bell, move on to another person. We will do this four times."
3. After four rounds, ask everyone to be seated. Debrief the exercise using some combination of the following questions:
 - What was the experience like?
 - What were your colleagues saying?
 - Was this exercise easy or difficult for you? Why?
 - What did you learn from others?
 - Did you find that your language changed with each new partner? If so, how?
 - Were you surprised by anything you said? Or anything you heard?
4. After the debriefing, summarize any key points. You might comment, for example, on how everyone found it easy to talk about why they care. Or you might note that many mentioned the power of a particular program. Or you might just comment on the energy level in the room and how their enthusiasm was contagious.
5. Conclude the exercise by asking the group for their thoughts about how you might apply the ideas you generated to improve your fundraising.

We thank Gail Perry of Fired Up Fundraising for sharing this exercise.

TRAINING TIP Even with simple exercises like this one, it's helpful to give very clear instructions so everyone knows exactly what's expected. If you're a new facilitator, you might choose to write the instructions or have this book handy.

Trust Your Instincts: Six Quick Asks



This activity is a great warm-up for other, more complex role plays. You can even use it as a warm-up before a meeting with a real donor. It'll help you learn to think on your feet, which is a key skill for fundraisers. Facilitators love it because it brings instant energy to the room and it's simple to organize.

Why Do This Exercise?

Because sooner or later you will have to answer the question "Why should I give?"

Use This Exercise When

You are preparing people for face-to-face solicitations

Time Required

20-30 minutes

Audience

Anyone involved with your fundraising campaign: some combination of board, staff, and volunteers—especially those who are preparing for visits with donors

Setting

A quiet room large enough for people to pair up, talk, and hear each other

Materials

None

FACILITATING THE EXERCISE

1. First model the exercise. Recruit a partner to join you at the front of the room. Explain that your partner's job is to ask you the question "Why should I give?" six times in a row. Your job, in modeling the exercise, is to come up with six different answers, customized to address what you know about your partner. For example,

"Why should I give?"

"Sally, our organization sustains the community programs your mother helped create. Your gift would be a great way to honor your family legacy."

"Yes, but why should I give?"

"Our group is one of the most effective in the city, and I know you like to invest in groups that use money wisely and achieve tangible results. That's why we're asking you to consider a gift."

“That’s good, but why should I give?”

“Sally, you’re one of our most dedicated volunteers—so you understand that volunteer labor isn’t enough to get everything done. Your gift supports the staff and training that makes volunteers like you so productive and increases our impact.”

(Continue with three more variations on “Why should I give?”)

If you like, encourage your partner to incorporate a few common excuses into the questions. For example, “I already support several organizations—why should I give to yours?” or “I don’t have much money at the moment—why should I give?” As you model the exercise, do your best to provide thoughtful responses to the questions.

2. When you complete your six responses, take a bow and enjoy the applause. Spend a few minutes on feedback from the group: what they observed, what worked, and what might be improved.
3. Provide the following instructions to your participants.
 - a) Pair up; choose someone you don’t work with very often. (If both board and staff are being trained together, suggest board-staff pairs.)
 - b) Within each pair, decide who will be first to ask the questions and who will answer them.
 - c) The person being solicited asks the question six times: Why should I give? Variations on this question are encouraged. If you’re responding, do your best to come up with six different answers.
 - d) Switch roles and repeat.
 - e) Once you’ve completed the role play, take a few minutes to give each other feedback: What worked? What could we each do to make the case more effectively?
4. After the role play and feedback, reconvene the full group to debrief the exercise by asking some combination of the following questions:
 - What worked? What did you do well?
 - Who heard a good response to the question “Why should I give?” that you’re willing to share?
 - What do the most effective responses have in common?

One reason this exercise is effective is that with each subsequent reply to the question “Why should I give?” solicitors tend to come up with deeper, more meaningful answers, because they use the easy ones first. These later responses tend to have greater impact.

We thank our colleagues at the Center for Progressive Leadership for sharing this exercise.

TRAINING TIP The success of this exercise depends, to some degree, on how well you model the answers at the start. If you require a lot of preparation, set aside time to practice in advance with a friend or colleague, or even in the mirror. Talk into a voice recorder. You don’t have to be flawless, but you do need to be comfortable and authentic.

And if you’re one of those people who prefers improvisation to preparation, this activity was made for you. Jump in and have fun with it.