Train Your Volunteers, Your Board, and Everyone Else to Raise Money

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:

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Have fun—enjoy yourself!

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

You don’t have to be a fundraising expert to use this book. Most of these exercises can be facilitated by anyone. But there are some activities which we believe an experienced fundraiser should lead. For these we’ve included a special icon.

Here is some general information about fundraising to keep in mind.

There is plenty of money available. Nonprofits in the United States raise a total of $1.5 trillion each year from three sources: earned income from service fees and product sales, government grants and contracts, and philanthropy. The philanthropic slice of the pie, which includes gifts from individuals, foundations, and corporations, totals more than $300 billion per year.

Most philanthropy comes from individuals. Year after year, about 80% of donated dollars are given by individuals. People new to fundraising tend to think it’s all about foundation grants and corporate gifts, but these comprise only 20% of private giving. Indeed, through their bequests and estate plans, deceased donors give more money annually than all U.S. corporations combined.

Most people give. Seven out of ten households contribute to charitable organizations. Further, a large proportion of charitable dollars are given by middle class, working class, and poor people. Many novices wrongly believe that fundraising is about trying to identify and ask rich strangers.

People give because they are asked. Indeed, academics have conducted research about why people don’t give, and the number one reason is “Nobody asked.”

The most effective way to ask is face to face. Unfortunately, this is also the scariest way. Many of the exercises included here are designed to help people get over their fear, build their skills and confidence, and get out and ask.

It’s all about relationships. Fundraising isn’t just asking for money. It’s a whole suite of behaviors that include identifying donors, cultivating them, asking for support, recognizing them when they give, and involving them in your work. Several exercises in this book will help you work through the nuts and bolts of maintaining mutually rewarding relationships with your donors.
Facilitating the exercise

1. Photocopy the handouts in advance.

2. Share copies of the Cycle of Fundraising handout (page 44) with your trainees. Explain that this is a simple map for creating healthy, mutually beneficial relationships with donors. Note that only a fraction of the work is asking for money. Most of the cycle is about what happens before and after asking.

3. As a warm-up for the small group work to follow, ask the full group to brainstorm one or two activities that might fit into each phase. For example, “What are some of the ways we might identify prospective donors?” (Two possible answers: compile lists of friends, and review published donor lists from peer organizations.) Ask similar questions for each phase.

This exercise reduces resistance by helping people move past the idea that fundraising equals asking for money. You can create a menu of ways everyone—board, staff, volunteers, donors—can participate, even if they’re unwilling to be askers. If you want to develop a fundraising culture throughout your organization, this is a great way to start.
of the donor cycle—“What steps could we take to educate and cultivate donors?”—encouraging an answer or two for each phase.

4. Once the large-group brainstorm is complete, distribute copies of the donor relationship menu developed by the North Lakeland Discovery Center (page 45). Explain that it was created by board and staff working together. Give participants a few moments to review the handout and ask questions.

5. Ask your colleagues to form small groups of three to five. Share copies of the worksheet Cycle of Fundraising: Building a Donor Engagement Menu (page 46). Ask each small group to fill it in, brainstorming one stage of the cycle at a time: “What are our different options for identifying prospects? Fill in the relevant box. How about educating and cultivating those prospects?” And so on. Let them know they will have about fifteen minutes to complete the worksheet.

6. While the small groups are brainstorming, write the following titles—one per sheet—on flip chart paper:
   - Identify Prospects
   - Educate, Cultivate, Involve
   - Ask
   - Thank and Recognize
   - Involve More Deeply

7. After about fifteen minutes, reconvene everyone into the large group to report their work. Begin by collecting all the items for Identify Prospects, writing them on the relevant flip chart page. Then collect the items for Educate, Cultivate, Involve. Capture all ideas for each stage in the cycle before moving to the next.

8. To debrief this exercise, use some combination of the following questions as you discuss each flip chart page:
   - Which of these tasks are we already doing?
   - What steps do we need to focus on to improve our donor relations?
   - Are there any specific tasks you would like to help with?

9. To conclude, draw a large circle on a piece of flip chart paper. With the help of the participants, divide the circle into a pie chart graph indicating how much time your organization should spend on each of the five functions. For an example, see page 47.
As you wrap up, ask for a volunteer to transcribe your flip chart notes into the Cycle of Fundraising template. It will provide a simple one-page map outlining your donor identification and engagement strategy. It also creates a menu of ways everyone in the organization can assist with fundraising, including many ways that don’t involve asking.

**TRAINING TIP** Templates help people understand new concepts in a tangible way. While not necessary, we have found that reviewing a completed template (see next pages) helps people build a model that fits their own organizations. We have tried this exercise both ways—sharing the template first vs. allowing the group to build its own from scratch—and can vouch that using the template early in the exercise is very helpful.
Cycle of Fundraising

- **Identify Prospects**
  - Involve More Deeply
  - Educate, Cultivate, Involve
  - Ask
  - Thank and Recognize
Cycle of Development: Expanding Your Connection

Naturally Inspiring and Enriching Lives through Meaningful Connections with Nature, People and Community

www.DiscoveryCenter.net • (877) 543-2085 • Contact@DiscoveryCenter.net

Inclusive Involvement

1. Train volunteer-donors to give Center tours
2. Ask donors to assist, lead or invite them to programs and events.
3. Invite donors to join Board, committees or focus groups.
4. Ask donors to write a story for newsletter on personal importance of DC.
5. Ask donors to host house parties in concert with board members, and to make intro/open doors.
6. Ask donors for feedback on planning, fundraising, and other organization-wide initiatives.

Identify Prospects

1. EAD and Staff identify potential foundation grants.
2. Seek and refer board members with fundraising experience.
3. Actively seek potential donors/volunteers.
4. Review donor lists for potential donors who have given to similar organizations.
5. Have a designated person(s) to talk to referrals.

Educate and Cultivate

1. Develop the why through an “elevator speech”. Train staff and board.
2. Host donor dinners and events with time dedicated to the DC story.
3. Tours—train ambassadors on “elevator speech.”
4. Ask donors to talk to donors, and provide opportunities for roundtable discussions.
5. Create Q&A with common questions, and include how to learn about upcoming events, who to call to be involved.
6. Articles and photos in newsletters (e.g., bequests, memorial gifts; personal stories from participants).
7. Seek out media attention for grant receipts and DC story-telling opportunities.

The System: A volunteer and donor tracking database is key to providing personalized attention and to communicating respectfully.

Thank and Recognize

1. Board makes quarterly calls to new donors $250+.
2. Informal thank you’s (e.g., at event or program).
3. Invite and recognize sponsors, item donors and volunteers at summer recognition events.
4. Host Voyageur Dinner and Member Appreciation Night/Annual Meeting.
5. Publicize names of supporters in annual flier and otherwise as appropriate.
6. Send donors CDs, DVDs and other visual gifts thanking them.
7. Personalize gifts and notes.
8. Encourage attendees at events to patronize supporters and sponsors – and frequent their establishments yourselves.

The Ask

1. Face to face visits (collaborative)
2. At house parties and other events as appropriate.
3. Website, email and social media asks.
4. Letters (e.g., sponsor) and follow up calls.
5. Identify challenge or matching donor gifts.
6. Make calls supporting a special event.
7. Solicit/give items for silent or live auctions.
8. Recruit new members.
Cycle of Fundraising
BUILDING A DONOR ENGAGEMENT MENU

Create a menu of activities for each stage of the relationship:

**Identify Prospects**
1.
2.
3.
4.
5.
6.

**Educate, Cultivate, Involve**
1.
2.
3.
4.
5.
6.

**Involve More Deeply**
1.
2.
3.
4.
5.
6.

**The Ask**
1.
2.
3.
4.
5.
6.

**Thank and Recognize**
1.
2.
3.
4.
5.
6.
Cycle of Fundraising Time Allocation

Breakdown of Time Spent on Each Phase of Fundraising Cycle

Adapted from Tina Cincotti, Funding Change Consulting. Used with permission. Thanks, Tina!
Features and Benefits: What Are We Selling?

Do you know the difference between a feature and a benefit? This distinction is the heart of marketing theory. Simply put, you describe something by listing its features, and you sell it by recounting what it can do: its benefits. A drill, for example, might include a sixteenth-inch drill bit. That’s a feature. But people buy it because of the hole it can drill, rather than the bit or even the drill itself. Yes, the hole is the benefit.

In this exercise, we apply the distinction between features and benefits to fundraising. It will help board and staff members identify the most powerful reasons for supporting your organization and become more confident in discussing your organization with others.

**Why Do This Exercise?**
Because one of the great mistakes in fundraising is selling the features rather than the benefits

**Audience**
Your board, staff, or any committee that serves the organization

**Use This Exercise When**
You are working to develop compelling messages for your organization

**Setting**
Anywhere you gather to work on your campaign plan and train your participants

**Time Required**
20 minutes

**Materials**
- Two easels with flip chart paper and markers
- A fork or other common object

**FACILITATING THE EXERCISE**

This exercise includes two parts. The first uses an everyday object - we sometimes use a fork - to clarify the distinction between features and benefits. The second part applies that distinction to your organization.

1. Prepare two flip chart pages for each section. Put the word FEATURES on the top of one page and the word BENEFITS on the other.

2. Hold up the object you have selected and ask people to identify its features. If you use a fork, features will include four tines, made of metal or plastic,
approximately five inches long, curved handle, decorative markings, and the like. The point is that features describe the fork.

3. Then ask for a list of benefits, i.e., what the fork can accomplish. The list might include getting food to your mouth, keeping your hands clean, minimizing the spread of germs, enabling you to handle hot food.

4. Once you have a reasonable list of features and benefits, turn the flip chart pages and again write FEATURES on the top of one and BENEFITS on the other.

5. Now ask everyone first to itemize the features of your organization and then its benefits. Remember that your buildings, staff, committees, and financial management systems are all features, but the results of your work in the community are benefits.

6. Once you’ve completed these lists—don’t let this drag on—ask your colleagues how they might use the benefits to describe your organization. For example, if you provide food to hungry children, one benefit is that kids do better in school when they’re well fed. If you work to protect wild lands in your local watershed, one benefit is clean drinking water which also saves taxpayer money by not having to build a new filtration plant.

7. To debrief the exercise, ask the following questions:

- Which benefits should we highlight to describe our organization?
- In our current materials, do we focus on features or benefits?
- How might we strengthen the ways we talk about our organization?

By completing the exercise, you can shift donor conversations from features to benefits, which is a far more powerful and productive approach. Rather than describing the physical features of your building, you can talk about how that building makes it possible for you to care for your clients: “In our new building, we provide a full range of free health care services to all patients, including those who are disabled.”

We thank our colleague Michael Miller for sharing this exercise.

**Training Tip** When you introduce an exercise, let people know at the start how much time it will take. That gives you leverage to move the discussion along and wrap it up efficiently. If someone is talking too long, thank them for their thoughts but call attention to the time remaining.
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.

<table>
<thead>
<tr>
<th>Why Do This Exercise?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Because sooner or later you will have to answer the question “Why should I give?”</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Use This Exercise When</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are preparing people for face-to-face solicitations</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Time Required</th>
</tr>
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<tbody>
<tr>
<td>20-30 minutes</td>
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</table>

<table>
<thead>
<tr>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anyone involved with your fundraising campaign: some combination of board, staff, and volunteers—especially those who are preparing for visits with donors</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>A quiet room large enough for people to pair up, talk, and hear each other</td>
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</tbody>
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<table>
<thead>
<tr>
<th>Materials</th>
</tr>
</thead>
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<tr>
<td>None</td>
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**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.