

Facilitator Preparation Guide

Facilitator Instructions:

Use the following steps to prepare to lead a simulation-based coaching exercise. Check the box in the column on the right to indicate completion of a step.

Step	Complete
1. Review entire Simulation-Based Toolkit for Fundraisers <ul style="list-style-type: none"> a. Facilitating a Scenario-Based Coaching Session (pages 11-19) b. Self-Reflection and Feedback Forms (pages 21-27) 	<input type="checkbox"/> <input type="checkbox"/>
2. Download Simulation-Based Coaching Scenario Library and review scenarios.	<input type="checkbox"/>
3. Choose fundraising staff to participate in the activity. <ul style="list-style-type: none"> a. Select less-experienced fundraising staff to practice their skills during simulations. b. Select more-experienced fundraisers to play prospects and serve as coaches during feedback sessions. If necessary, select volunteers to play the prospects in the activity. 	<input type="checkbox"/> <input type="checkbox"/>
4. Schedule the workshop one to two months ahead of time. <ul style="list-style-type: none"> a. Choose a realistic location (e.g., small classroom or other flexible meeting space) for simulations. Ensure that the room has adequate seating for all participants to observe each simulation. b. Contact university administrators to reserve simulation space for 1.5 to 3.5 hours (depending on the number of simulations) for day one. c. Reserve a meeting space for 1 to 1.5 hours (depending on the number of simulations) for day two. The session does not have to occur in the same setting as the session on day one. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5. Contact participants <ul style="list-style-type: none"> a. One to two months before day one, send all participants an introductory email with an Outlook Calendar invitation for the scheduled workshop (see Introductory Email Template on page 10). b. Two weeks before the scheduled workshop, distribute the Scenario Library to less-experienced staff (see Pre-Work Email Template on page 11). c. Allow participants to choose scenarios from the Scenario Library, or create your own using the template. d. Determine which coach will act as the prospect in each chosen simulation. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
6. Gather required supplies for day one and day two: <ul style="list-style-type: none"> a. Day One Introductory Presentation (downloaded on the laptop used on the day of the simulation) b. Computer, projector, and cord to connect computer to projector c. Video camera and tripod d. Printed scenario instructions, reflection forms, and PowerPoint slides e. Pens or pencils f. Flip chart, white board, or chalk board, and marker or chalk 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>