



Simulation-Based Coaching Scenario Library

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Introduction to Simulation-Based Coaching

Overview of Simulation-Based Coaching

Often, an individual's perception of their performance does not match how others interpret what happened. Simulation-based coaching is a powerful activity that allows individuals to better understand their performance through video replay and group feedback.

Development leaders can use simulation-based coaching to:

- Help fundraisers gain a better understanding of their performance (strengths and development objectives)
- Provide peers a forum to share feedback with colleagues on situations they typically would not witness
- Assist fundraisers in building skills and competencies

Instructions for Facilitator

Facilitators conducting a scenario-based coaching session should use this Simulation-Based Coaching Scenario Library in conjunction with the Simulation-Based Coaching Toolkit for Fundraisers. The toolkit contains detailed instructions on how to run a simulation-based coaching session. The scenario library contains sample scenarios to use during these sessions.

Scenarios should be chosen by each fundraiser based on skills they would like to develop. Fundraisers should inform the facilitator of their scenario choices before the coaching session takes place. Facilitators can then assign other MGOs to play the prospect(s) in each simulation.

When creating customized scenarios, use the following criteria to determine which aspects to include:


- Create scenarios that are common or likely at your institution
- Create scenarios that address the greatest pitfalls in fundraiser performance at your organization and test fundraisers outside of their comfort zone
- Enhance the diversity of topics covered during the group discussion by adding scenarios not included in the Scenario Library

Consider inviting board members, past donors, or student volunteers to participate as donors in the simulations.

Why Simulate a Major Gift Solicitation?

Major gift asks are critically important in higher education fundraising, since 90% of dollars raised are contributed by 10% of donors. In face-to-face conversations, less than 35% of impact occurs through verbal communication, while over 65% of impact occurs through nonverbal communication. Participating in simulations and reviewing video afterwards enables fundraisers to practice and observe both verbal and nonverbal communication.

Each simulation is chosen because it impacts the experience of prospects, donors, and/or allies. Because most major gift solicitations occur one-on-one, colleagues rarely get the opportunity to observe fundraiser performance and provide feedback. It is imperative for fundraisers to practice and master this essential job function to maximize major gift revenue.

 Download the Simulation-Based Coaching Toolkit for Fundraisers at eab.com

Source: : Council for Advancement and Support of Education, "CASE Campaign Report: Pease A and Pease B, "The Definitive Book of Body Language," *The New York Times*, September 24, 2006, <http://www.nytimes.com/2006/09/24/books/chapters/0924-1st-peas.html?pagewanted=all>; Philanthropy Leadership Council, Advancement Forum.

Scenario 1: Broad Campaign Gift

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with Mr. Turner. A main objective of the conversation is to ask for a \$100K major gift to support university campaign priorities.

- Mr. Turner has been a generous supporter over the years.
- Mr. Turner focuses his support on athletics and gave a \$20K gift to the basketball program three years ago.
- Mr. Turner's two grandchildren recently enrolled at the institution. He loves their stories about student life and frequently calls Alumni Relations to discuss their experience.

Participants:

The fundraiser will be played by: _____

The prospect (Mr. Turner) will be played by: _____

Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating Mr. Turner. You feel it is a good time to ask for a broader gift that aligns with a top university priority.

Coach instructions for Mr. Turner:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop Mr. Turner's character. The bullet points below contain basic information about Mr. Turner to get you started:

- 81 years old
- JD from the institution, received a scholarship covering tuition and related expenses
- Retired corporate lawyer, still contributes to his firm's scholarship fund every year
- Does not like attending special donor events or reunions, but appreciates communicating with the institution
- Lives near campus and has basketball season tickets

Source: EAB interviews and analysis.

Scenario 2: Community Prospect Acquisition

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with Mr. Lawrence. A main objective of the conversation is to ask for a \$75K gift to support university campaign priorities.

- Mr. Lawrence is known for his support of local organizations; he sits on multiple nonprofit boards.
- Mr. Lawrence is very familiar with the university, but is not an alumnus of the institution.
- Mr. Lawrence has given large gifts to student outreach and success initiatives in the community, but has never given directly to the university itself.
- Mr. Lawrence has strong opinions about student access and success. He has sent you ideas about increasing outreach to students from economically-disadvantaged backgrounds.

Participants:

The fundraiser will be played by: _____

The prospect (Mr. Lawrence) will be played by: _____

Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating Mr. Lawrence. You feel it is a good time to ask for a major gift that aligns with a top university priority.

Coach instructions for Mr. Turner:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop Mr. Lawrence's character. The bullet points below contain basic information about Mr. Lawrence to get you started:

- 67 years old
- BA and MBA from a nearby institution
- Married, no children, 2 dogs
- Manages his family's manufacturing business, which recently switched to using energy entirely from renewable resources
- Enjoys mentoring, creating networking opportunities for students, and participating in hands-on projects in the community
- Very environmentally-conscious, prefers to travel in electric vehicles

Source: EAB interviews and analysis.

Scenario 3: Endowed Professorship

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with Ms. Matthews. A main objective of the conversation is to ask for a \$2M major gift to endow a professorship in computer science.

- Ms. Matthews has given a leadership gift to the annual fund for the last five years.
- Ms. Matthews has never given a major gift to the university.
- Ms. Matthews has expressed to you that her positive experience as a computer science student led to her current success. She frequently returns to campus to speak about her career.
- Ms. Matthews met with you during her most recent campus visit and expressed her desire to have a long-term impact on the university.

Participants:

The fundraiser will be played by: _____

The prospect (Ms. Matthews) will be played by: _____

Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating Ms. Matthews. You feel it is a good time to ask for a major gift because her interest area aligns with a university priority.

Coach instructions for Ms. Johnson:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop Ms. Matthews's character. The bullet points below contain basic information about Ms. Johnson to get you started:

- 47 years old
- Single, no children
- Graduated from the institution with an undergraduate degree in computer science
- Owns a rapidly-growing technology firm in Silicon Valley
- Actively participates in a mentoring program for women in technology
- Plays the guitar, enjoys live music and action sports events

Source: EAB interviews and analysis.

Scenario 4: High-Impact Bequest

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with Mrs. McGuire. A main objective of the conversation is to secure a \$100K bequest to the university.

- Mrs. McGuire regularly donates to the annual fund.
- Mrs. McGuire has attended multiple planned giving seminars for alumni but has not stated her own planned giving goals.
- Mrs. McGuire currently donates to numerous local organizations. Moving forward, she would like to make larger, high-impact gifts to a more select group of beneficiaries.
- Mrs. McGuire is recently widowed and is reconsidering the plans for her estate.

Participants:

The fundraiser will be played by: _____

The prospect (Mrs. McGuire) will be played by: _____

Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating Mrs. McGuire. You feel it is a good time to ask for a broader gift that aligns with a top university priority.

Coach instructions for Mrs. McGuire:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop Mrs. McGuire's character. The bullet points below contain basic information about Mrs. McGuire to get you started:

- 89 years old
- Met her husband while she was an undergraduate, and he was a medical student at the institution
- Award-winning painter
- Supporter of causes related to healthcare and the arts
- 3 children (1 attended the university), 6 grandchildren
- Enjoys travel and regularly attends university reunions

Source: EAB interviews and analysis.

Scenario 5: Reunion Chair Recruitment

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with Mr. Epstein. A main objective of the conversation is to enlist Mr. Epstein as a 25th reunion co-chair, including a gift of at least \$1M.

- Mr. Epstein was a vice-chair for the 20th reunion, and gave a \$500K gift, his largest gift to date.
- Mr. Epstein is familiar with the university's current direction, but is less familiar with priorities which could be funded by a gift at the co-chair level.
- Mr. Epstein is currently a board member at a large nonprofit organization. He often returns to campus for reunions and fraternity events.
- Mr. Epstein recently left his job at a large private equity firm in order to spend more time with his children.

Participants:

The fundraiser will be played by: _____

The prospect (Mr. Epstein) will be played by: _____

Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating Mr. Epstein. You feel it is a good time to ask for a broader gift that aligns with a top university priority.

Coach instructions for Mr. Epstein:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop Mr. Epstein's character. The bullet points below contain basic information about Mr. Epstein to get you started:

- 50 years old
- Earned both Bachelor's and MBA at the university
- 2 children who will be applying to university in the next five years
- His spouse attended a rival university, but it is not among their giving priorities
- Joined a fraternity as an undergraduate and remains well-connected within its alumni network
- Enjoys running marathons

Source: EAB interviews and analysis.

Scenario 6: Leadership Annual Giving

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with Mrs. Hunter. A main objective of the conversation is to secure an annual \$25K leadership gift to the university.

- Mrs. Hunter donates irregularly to the annual fund.
- Mrs. Hunter has a very busy schedule but often attends events at her local alumni club.
- Mrs. Hunter and her spouse recently gave a named endowment fund to a local arts organization.
- Mrs. Hunter has little interest in reunions, advisory councils, or athletic events

Participants:

The fundraiser will be played by: _____

The prospect (Mrs. Hunter) will be played by: _____

Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating Mr. Hunter. You feel it is a good time to ask for a broader gift that aligns with a top university priority.

Coach instructions for Mrs. Hunter:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop Mrs. Hunter's character. The bullet points below contain basic information about Mrs. Hunter to get you started:

- 40 years old
- 1 child, currently enrolled at a private elementary school
- Partner at a consulting firm, spouse is a corporate lawyer unaffiliated with the university
- Enjoys attending performing arts events in her local community
- Prefers to travel as little as possible, rarely returns to campus

Source: EAB interviews and analysis.

Scenario 7: Customizable Scenario Template

Overview:

When it is your turn, you will have five to seven minutes to act out the scenario below.

Scenario Description:

The fundraiser will engage in a conversation with _____. A main objective of the conversation is to ask for a \$_____ major gift to fund _____.

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-
-
-

Participating Fundraiser Instructions:

The fundraiser will be played by: _____

The prospect (_____) will be played by: _____


Participating Fundraiser Instructions:

Please conduct yourself during the simulation as you would during a real major gift solicitation. Assume you have been cultivating _____. You feel it is a good time to ask for a major gift because _____.

Coach instructions for _____:

Please conduct yourself during the simulation as you would during a major gift solicitation. You may choose to accept the request as it is made or agree to a different dollar amount than the one proposed. Feel free to improvise and develop _____'s character. The bullet points below contain basic information about the prospect to get you started:

-
-
-
-
-

Customize your scenarios by downloading the scenario template at eab.com 

Source: EAB interviews and analysis.



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Education Advisory Board

2445 M Street NW, Washington DC 20037

P 202.266.6400 | F 202.266.5700 | eab.com