



# Building Skills Through Video Replay and Group Feedback

Simulation-Based Coaching Toolkit for Fundraisers

# Advancement Forum

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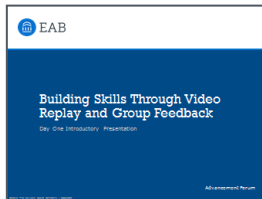
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# Supporting Members in Best Practice Implementation

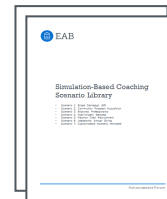
## Resources Available Within Your Membership

This toolkit is part of a suite of resources, detailed below, dedicated to assisting members in conducting a simulation-based coaching exercise with advancement staff. This toolkit is a new addition to our strategic talent management resource library.



### Day One Introductory Presentation

Instructional slides for participants containing information about simulation-based coaching, ground rules for the session, and tips for giving feedback.



### Simulation-Based Coaching Scenario Library

Ready-made scenarios for top fundraiser job responsibilities including campaign gift solicitations, reunion chair recruitment, and prospect acquisition.

Download the Simulation-Based Coaching Slides and Scenario Library at [eab.com](http://eab.com)

## Talent Management Resources

Over the past several years, the Advancement Forum has developed multiple resources to assist members with advancement talent management. The most relevant resources are outlined here. All of these resources are available in unlimited quantities through your membership.



### Competing for Talent

#### *9 Strategies for Improving Major Gift Officer Recruitment*

Best practices and accompanying tools for building long-term candidate pipelines, designing interview and hiring processes, and providing an onboarding program that accelerates productivity to put your institution ahead in an MGO search.



### Gifted and Talented

#### *What Makes a Top Fundraiser in the Age of Venture Philanthropy?*

How to develop a new human capital strategy, and prescriptions for a new approach to fundraiser selection to enhance your MGO interview process.



### The Professional Development Playbook

#### *Targeting Skill-Building and Maximizing Advancement Staff Performance*

Tools for instilling accountability, diagnosing skill gaps, and deploying high-impact skill-building to realize untapped potential among fundraisers and set institutions apart in the talent war

# Executive Summary

## Introduction

Often, an individual’s perception of their performance does not match their actual performance. Simulation-based coaching is a powerful activity that allows individuals to see their performance firsthand through video replay. Advancement 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

This toolkit provides the resources necessary to complete a scenario-based coaching session.

## Methodology

The table below outlines the key attributes of a successful simulation-based coaching exercise and an explanation of how the toolkit meets those attributes.

Attributes of Successful Simulation-Based Coaching Exercise	How Toolkit Meets Each Attribute
Meets a training need or requirement (based upon an organizational need, job/task need, or personal need)	<ul style="list-style-type: none"> <li>• Provides training on an essential fundraiser job requirement such as a major gift solicitation, new donor acquisition, or estate planning conversation</li> </ul>
Realistic	<ul style="list-style-type: none"> <li>• Emulates real situations fundraisers face and occurs in realistic setting</li> </ul>
Pre-planned	<ul style="list-style-type: none"> <li>• Facilitator receives detailed instructions on how to plan the scenario</li> <li>• Each participant receives individualized instructions</li> </ul>
Contains opportunities for assessing and diagnosing individual performance	<ul style="list-style-type: none"> <li>• Contains ample opportunities for self and group reflection and discussion</li> </ul>
Includes different situations with different triggered reactions	<ul style="list-style-type: none"> <li>• Includes different scenarios with different hurdles for each participating fundraiser</li> </ul>
Requires the same cognitive process as the simulated event	<ul style="list-style-type: none"> <li>• Requires participants to think on their feet as they would in a real donor, prospect, academic leader, or volunteer interaction (without a word-for-word script)</li> </ul>
Leads to long-lasting changes in behavior	<ul style="list-style-type: none"> <li>• Group collaboratively develops scenario-specific goals and talking points</li> <li>• Reflection and feedback forms followed by a facilitated group discussion ensure best practices are implemented during future interactions</li> </ul>

Source: Salas E, et. al., "Using Simulation-Based Training To Improve Patient Safety: What Does It Take?" *The Journal on Quality and Patient Safety*, 2005, Vol. 31: 363-371; EAB interviews and analysis.





# Preparing for a Simulation-Based Coaching Session

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SECTION

1

- Simulation-Based Coaching Logistics Guide
- Facilitator Preparation Guide
- Introductory Email Template
- Simulation Description and Agenda
- Pre-Work Email Template

# Simulation-Based Coaching Logistics Guide

**Target audience for workshop:** Frontline fundraisers

**Type of exercise:** Competency and skill development role play

**Time commitment:** three to five hours spread over two days (day one: 1.5 to 3.5 hours, day two: 1 to 1.5 hours)

**Participants:** Session facilitator, 3-7 less-experienced frontline fundraisers, 1-2 more-experienced fundraisers (who will serve as coaches)



If you are working with a small team, prospects can be played by board members, students, engaged allies, or actors. These volunteers should also give feedback to fundraisers.

## Implementation Materials:

Toolkit Section	Attendee Role
Facilitating a Scenario-Based Coaching Session	Facilitator
Participating Fundraiser Self-Reflection Form	Fundraising team members acting-out a scenario
Observer Feedback Form	Fundraising team members observing a scenario
Coach Feedback Form	Experienced fundraisers playing the "prospect" in a scenario or observing the scenario



### Guide to Distributing Materials to Attendees

- Everyone participating in the same scene should receive the same scenario instructions (i.e., participating fundraisers and coaches).
- Distribute a Participating Fundraiser Self-Reflection Form to each fundraiser taking part in a filmed simulation.
- Distribute enough Coach Feedback Forms for each coach to comment on each fundraiser's performance (if there are three fundraisers participating, each coach should receive three Coach Feedback Forms).
- Distribute Observer Feedback Form to fundraisers observing the scenario (if there are three fundraisers participating, each fundraiser should receive two Observer Feedback Forms).

Source: EAB interviews and analysis.



# 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"> <li>a. Facilitating a Scenario-Based Coaching Session (pages 11-19)</li> <li>b. Self-Reflection and Feedback Forms (pages 21-27)</li> </ul>	<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"> <li>a. Select less-experienced fundraising staff to practice their skills during simulations.</li> <li>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.</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
4. Schedule the workshop one to two months ahead of time. <ul style="list-style-type: none"> <li>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.</li> <li>b. Contact university administrators to reserve simulation space for 1.5 to 3.5 hours (depending on the number of simulations) for day one.</li> <li>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.</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5. Contact participants <ul style="list-style-type: none"> <li>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).</li> <li>b. Two weeks before the scheduled workshop, distribute the Scenario Library to less-experienced staff (see Pre-Work Email Template on page 11).</li> <li>c. Allow participants to choose scenarios from the Scenario Library, or create your own using the template.</li> <li>d. Determine which coach will act as the prospect in each chosen simulation.</li> </ul>	<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"> <li>a. Day One Introductory Presentation (downloaded on the laptop used on the day of the simulation)</li> <li>b. Computer, projector, and cord to connect computer to projector</li> <li>c. Video camera and tripod</li> <li>d. Printed scenario instructions, reflection forms, and PowerPoint slides</li> <li>e. Pens or pencils</li> <li>f. Flip chart, white board, or chalk board, and marker or chalk</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

# Introductory Email Template

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**Instructions:** Up to 90 days before filming, use this template to send an email to fundraisers chosen to participate in the filming session. This email can be sent once a date has been set for the session, or the message can be followed by a calendar invitation once rooms have been reserved. Information in brackets should be customized to fit your institution.

**Attachment:** Simulation Description and Agenda (page 11) to this email.

Dear Colleagues,

You have been selected to participate in a simulation-based coaching session. This is a four to five hour training session spread over the course of two days in the same week. The sessions will enable you to practice common solicitation scenarios in a low-stakes environment. You will also receive and share feedback with other MGOs.

### **Day One – 3.5 hours**

You will have the chance to pick one of seven different fundraising solicitation scenarios prior to day one. During the session, you will do a five- to seven-minute role play with an experienced fundraiser, soliciting them for the opportunity you selected and prepared. The role play will be filmed, and the other participants will offer positive feedback. This will allow you to learn what techniques you used successfully. In turn, you will be able to offer positive feedback to role-playing colleagues.

After day one, you will review the video of your role-play in order to see the solicitation from the prospect's point of view.

### **Day Two – 1.5 hours**

After reviewing your own video, you will have the opportunity to discuss what you saw and reflect on the experience.

This will be an opportunity to see your colleagues' solicitation styles, gain new techniques, reflect and give feedback to other fundraisers, and interact with experienced coaches. You may gain ideas for strategies you've never seen before. While filming may sound frightening, you will be able to see exactly what you do well and receive positive feedback based on situations your colleagues would not otherwise witness.

A detailed simulation description and agenda are attached. An Outlook invitation will follow shortly. Classes are tightly constructed for optimal size. Please let me know immediately if you have a major conflict or any questions about the class. I will send more information as the date approaches.

Sincerely,

[*Your Name*]

Source: EAB interviews and analysis.

# Simulation Description and Agenda

**Instructions:** Attach the following description in the initial email outreach to explain the workshop to participants and to communicate the timeline for the workshop.

## Simulation-Based Coaching Workshop Description

The Simulation-Based Coaching Workshop is a session designed to help fundraisers master a key function of their job. The session was developed by the Advancement Forum and informed by the experience of the advancement professionals at a top-tier private research university. Through this two-day exercise, the team will hone the skills and competencies required for real-life success.

Across the sessions, we will discuss and develop best practices, provide feedback to each other, and reflect on the experience. At the end of the session, every fundraiser will have a clear plan for how to evolve their performance.

Agenda	
<b>Up to 2 Weeks Before Day One</b>	
N/A	Fundraisers choose from eight scenarios
N/A	Fundraisers and coaches review guide on giving positive-only feedback
<b>Day One (1.5 to 3.5 Hours)</b>	
20 minutes	<ul style="list-style-type: none"> <li>Welcome the group</li> <li>Walk-through Day One Introductory Presentation</li> </ul>
5-7 minutes for each fundraiser	Filmed simulation
1-3 minutes each	Completion of feedback forms immediately following each simulation
10-15 minutes each	<ul style="list-style-type: none"> <li>Participating fundraiser reacts to the simulation</li> <li>Peers give positive-only feedback</li> <li>Coaches and facilitators ask guiding questions and share their experiences</li> </ul>
10 minutes	Session wrap-up and instructions for post-session video review
Homework	Fundraisers review their own videos three times before the second group session
<b>Day Two (1 to 1.5 Hours)</b>	
10 minutes	<ul style="list-style-type: none"> <li>Summarize accomplishments from day one</li> <li>Review how to give constructive feedback</li> </ul>
7-10 minutes each	<ul style="list-style-type: none"> <li>Individual self-assessment</li> <li>Peers and coaches give constructive feedback</li> <li>Facilitator ends with one piece of positive feedback per fundraiser</li> </ul>
10 minutes	<ul style="list-style-type: none"> <li>Session wrap-up focusing on takeaways for the group</li> <li>Facilitator recovers and destroys feedback forms</li> </ul>

Source: Melvin A, "How a Video Camera Can Improve Fundraising Training," *Chronicle of Philanthropy*, April 16, 2015, <https://philanthropy.com/article/Advice-How-a-Video-Camera-Can/229367>; EAB interviews and analysis.

# Pre-Work Email Template

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**Instructions:** Two to three weeks before day one, send this email to fundraisers who will be filmed. Attach the Scenario Library, or a set of customized scenarios, to the message. Information in brackets should be customized to fit your institution. Once participating fundraisers have chosen their scenarios, send the coaches a list of scenarios in which they will act as prospects.

**Attachment:** Scenario-Based Coaching Scenario Library

Dear Colleagues,

I am looking forward to your participation in the simulation based coaching session. Day one of the session will occur on [date of day one] from [hours for day one] in [room reserved for day one]. Day two of the session will occur on [date of day two] from [hours for day two] in [room reserved for day two]. I will lead the session and will be assisted by [names of coaches participating].

Attached is a Scenario Library. It is mandatory to choose and prepare one of the scenarios before day one. Please read this document and email me with your selected scenario by [deadline to choose a scenario]. If you would like to customize a scenario to fit your own professional development needs, please complete the Customizable Scenario Template. Email this to me by [deadline to choose a scenario].

Please let me know if you have any questions about the session, or about soliciting major gifts in general. It is perfectly normal to be nervous about being filmed. However, the session should be an enjoyable, useful experience. Remember- everyone is as nervous as you are! Choose a scenario to prepare, be ready to give and receive feedback, and the session should be a success for all involved.

I look forward to working with you soon.

Sincerely,  
[Your Name]



# Facilitating a Simulation-Based Coaching Session

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SECTION

2

- Conducting the Session
- Introductory Presentation and Facilitator Talking Points
- Facilitator Discussion Guide


# Conducting the Session

## Day One


### Facilitator Instructions:

Use the following steps to conduct day one of the Simulation-Based Coaching Workshop.

Step	Approximate Time Required
1. Welcome the group and make participants feel comfortable with the exercise. Introduce the activity by walking through the Day One Introductory Presentation PowerPoint deck. Use the talking points on pages 14-18 of this toolkit. Review expectations for day one, homework, and day two using slide six (page 18)	15 minutes
2. Check that each attendee has the appropriate forms. Pass out copies of missing forms to anyone who does not have the necessary documents. Collaboratively determine the order in which fundraisers will be filmed, and write this on the board or flip chart. <ul style="list-style-type: none"> <li>• Refer to the guide to distributing materials to attendees on page 8.</li> <li>• Designate a timekeeper to alert fundraisers to the end of the scenario.</li> </ul>	5 minutes
3. Film each participant completing the scenario. Other participants should observe the simulation as it occurs. <ul style="list-style-type: none"> <li>• Allow 5 to 7 minutes for each fundraiser and coach to act out the scenario.</li> <li>• Allow 1-2 minutes for all participants to complete feedback forms.</li> </ul>	10 minutes per video
4. Immediately following each simulation, all participants should give positive feedback. <ul style="list-style-type: none"> <li>• The participating fundraiser should react to their performance.</li> <li>• Whoever played the prospect in the scenario (a coach or observer) should give positive feedback based on the fundraiser's performance.</li> <li>• Other fundraisers should give positive feedback based on specific observed behaviors.</li> <li>• Coaches and the facilitator should ask guiding questions to ensure that a maximum of positive aspects are discussed.</li> </ul>	10-15 minutes per video
5. Wrap-up the session. <ul style="list-style-type: none"> <li>• Summarize what has been discussed.</li> <li>• Instruct fundraisers to watch their own video three times before day two (refer to page 18 for details on re-watching videos).</li> <li>• Recover feedback forms for use on day two.</li> </ul>	10 minutes



If more than five simulations are being filmed, plan a ten-minute break in the middle of this session.



Send each fundraiser their video as soon as possible after day one, so they can complete the homework.

Source: EAB interviews and analysis.


# Conducting the Session

## Day Two

### Facilitator Instructions:

Use the following steps to conduct day two of the Simulation-Based Coaching Workshop.

Step	Approximate Time Required
1. Summarize goals for the session and accomplishments from day one. <ul style="list-style-type: none"><li>Review how to give constructive feedback.</li><li>Redistribute feedback forms to the individuals who completed them. Allow participating fundraisers to complete Part B of the Participating Fundraiser Feedback Form.</li></ul>	10 minutes
2. For each fundraiser, discuss their performance on day one. <ul style="list-style-type: none"><li>Each fundraiser describes how they reacted during the video review.</li><li>The coach who acted as the prospect gives constructive feedback, followed by other fundraisers.</li><li>The facilitator asks questions to move the discussion forward and provides commentary when needed.</li><li>The group provides the fundraiser with one to two takeaways to improve in the future.</li><li>Each fundraiser's discussion ends with one piece of positive feedback.</li></ul>	7-10 minutes per fundraiser
3. Wrap-up the session. <ul style="list-style-type: none"><li>Summarize what has been discussed.</li><li>Review goals for the session and determine if they have been obtained.</li><li>Discuss how to move forward based on what was learned during the exercise.</li><li>Answer any final questions from participants.</li></ul>	10 minutes
4. Facilitator recovers and destroys feedback forms.	N/A

 Recovering and destroying feedback forms ensures that the simulation remains confidential, building trust among participants and leading to more constructive feedback.

# Introductory Presentation and Facilitator Talking Points

**“Can I Get a Replay?”**

Professionals Benefit From Seeing Themselves Through the Eyes of Others

**Learning Through Video Replays in Sports...**

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graph TD; 1[Athlete is unaware of strengths and weaknesses during the game] --> 2[Coach points out strengths and areas of improvement, but athlete lacks self-awareness]; 2 --> 3[Athlete watches video replay to see what the coach has described]; 3 --> 4[With practice, strengths crowd-out weaknesses over time];
```

**...And Other Professions**

- Medicine
- Music
- Sales
- Acting

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Source: 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>; EAB interviews and analysis.

## Key Teaching Point:

Simulation-based coaching is a powerful tool used in numerous settings. A top-tier private research university pioneered its use in higher education fundraising, and the Advancement Forum has adapted it for widespread adoption.

## Talking Points:

- The video replay aspect of today’s exercise borrows a teaching technique deployed by sports coaches.
- Often, athletes are unable to understand where they are succeeding or missing a mark until they see it firsthand.
- Video replay allows athletes (and fundraisers) to learn their strengths, catch mistakes, share best practices, and evolve overall performance.
- Each simulation is chosen because it represents a common experience with a prospect or donors.
- It is important that fundraisers gain comfort with these interactions in order successfully execute in high-impact situations. Fundraisers benefit both from practicing the simulation and from watching a video replay.

## Transition:

In addition to gaining knowledge through practice and video replay, this session will allow you to give and receive feedback about scenarios that often occur behind closed doors.



## Revealing Blind Spots



3

Four Avenues for Feedback Provide 360° View of Performance



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Source: EAB interviews and analysis.

### Key Teaching Point:

Each participant in the exercise will give feedback to help fundraisers improve their performance.

### Talking Points:

- Many interactions with donors, prospects, and faculty occur one-on-one. Because of this, colleagues are typically unable to provide feedback or share best practices on these interactions.
- The activity allows peers, participants, and coaches to view fundraiser performance, provide feedback, and make recommendations during the group discussion.
- Different sources of feedback allow the fundraiser to gain a well-rounded view of his or her performance.
- Each participant gives different feedback based on their role in the exercise and level of experience.
- Self-assessment allows the fundraiser analyze their own strengths and weaknesses.

### Transition:

To make the most out of the session, it's important to identify our goals and set a few ground rules.




Source: EAB interviews and analysis.

## Getting the Most From This Session







### Group Goals and Ground Rules

#### Goals for the Session

-  Watch other MGOs at work
-  Improve your own performance
-  Receive feedback from peers
-  Practice giving feedback to peers
-  Make mistakes with colleagues, instead of with major donors

#### Ground Rules

-  What happens in filming stays in filming.
-  Respond to feedback with "thank you" or clarifying questions. There is no need to explain behaviors.
-  Be open to sharing your own experience and implementing suggestions from others.
-  Maintain a collegial atmosphere and have fun.

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Source: EAB interviews and analysis.

### Key Teaching Point:

By attaining group goals, participants can improve their own performance. Ground rules will enable everyone to attain these goals.

### Talking Points:

- You will have the opportunity to observe MGOs in situations that would otherwise occur behind closed doors, an opportunity to observe new strategies or methods of communication.
- Giving and receiving effective feedback are important skills that you will practice today.
- Everyone should feel comfortable making mistakes here. As such, we will not discuss this session outside of day one and day two. Feedback forms will be recovered and shredded at the end of day two.
- When receiving feedback, there is no need to explain anything that occurred during the simulation.
- The success of this session relies on openness in giving and receiving feedback, and maintaining a comfortable working atmosphere.
- Is there anything else you would like to accomplish across day one and day two?

### Transition:

For feedback to be an effective tool, it should be given thoughtfully and constructively.

Source: EAB interviews and analysis.

## Offering Effective Feedback



### How to Participate in the Group Discussions

#### Tips for Giving Effective Feedback

- ✓ Focus on specific behaviors
- ✓ Use precise examples
- ✓ Check for understanding
- ✓ Be realistic
- ✓ Provide colleagues with new ways of looking at a situation

#### Tips for Receiving Feedback

- ✓ Ask questions if you do not understand
- ✓ Accept that multiple approaches may work in a given situation
- ✓ Recognize that feedback is for everyone's benefit, even if it is aimed at another fundraiser

#### Using Different Types of Feedback



##### Day One: Positive Feedback

- Reinforce preferred behaviors
- Build on what already works well so that weaknesses fall away
- Formula: behavior + impact



##### Day Two: Constructive Feedback

- Improve less-effective behaviors
- Aim for one to two core takeaways for each fundraiser
- Formula: behavior + impact + alternative positive behavior

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Source: EAB interviews and analysis.

### Key Teaching Point:

If deployed correctly, feedback has the potential to improve fundraiser performance; if deployed without a purpose or accuracy, it has the potential to discourage fundraisers.

### Talking Points:

- Think critically before offering feedback, following the guidance provided by the "Tips for Giving Effective Feedback" and "Tips for Receiving Feedback."
- Before communicating comments, consider three key questions:
  - 1) Is this comment grounded in specific circumstances?
  - 2) Is this comment objective?
  - 3) Does this comment communicate impact or consequence?
- On day one, we will only give positive feedback. On day two, we give constructive feedback.

### Logistical Note:

After reviewing the talking points, the facilitator should ensure that participants understand the differences between positive and constructive feedback.

### Transition:

Feedback should consider both verbal and non-verbal communication skills.

Source: EAB interviews and analysis.

## Evaluating All Forms of Communication



### The Impact of Verbal and Non-Verbal Communication

#### What Matters Most



<35%

Of impact in face-to-face conversations occurs through *verbal* communication

>65%

Of impact in face-to-face conversations occurs through *nonverbal* communication

#### High Stakes Interactions



"You never know what a donor is going to throw at you... Fumbling a visit or an ask could mean the loss of a major gift. And we could have been working toward that gift for years."

*Director of Training and Education,  
Private Research University*

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Source: 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>; EAB interviews and analysis.

### Key Teaching Point:

Verbal and nonverbal communication combine to produce successful solicitations.

### Talking Points:

- In general, less than 35% of impact in face-to-face conversations is based on what you say (verbal communication).
- Over 65% of impact in these conversations is based on nonverbal communication, including physical gestures, body language, and emotional connection.
- Because donor interactions can be high-stakes or emotionally-charged, nonverbal communication plays a crucial role in the success or failure of a solicitation.
- Feedback should refer to all forms of communication.

### Transition:

After filming, you will have the opportunity to assess your own verbal and nonverbal communication by watching the video of your simulation three times.

Source: EAB interviews and analysis.

## Opportunities for Self-Assessment



### Reviewing Your Own Video and Sharing Reactions

#### Day One

- React to your own simulation
- Complete feedback forms
- Give and receive positive feedback

#### Day Two

- Share your reactions to the video review
- Give and receive constructive feedback
- Think about individual takeaways

#### Homework

- Re-watch your own video three times

1



With the sound *off*,  
focus on:

- Physical gestures
- Body language
- Emotional connection

2



With the sound *on*,  
focus on:

- What was said
- How you react to what you hear

3



With the sound *on*,  
focus on:

- Verbal and nonverbal elements
- Your own strengths

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Source: EAB interviews and analysis.

### Key Teaching Point:

Watching videos allows fundraisers to improve performance by understanding their own strengths and areas for improvement.

### Talking Points:

- Feedback includes reactions from observers and coaches, and individual self-assessment.
- In addition to self-reflection during day one and day two, each of you participating today will be reviewing your own video three times.
- Before day two, watch your own video three times. Each time, focus on specific aspects of the simulation:
  - 1) With the sound *off*, look for physical gestures, body language, and emotional connection with the prospect.
  - 2) With the sound *on*, listen to what was said and notice how you react to what you hear.
  - 3) With the sound *on*, pay attention to both verbal and nonverbal elements. Look for your strengths.

### Transition:

Now that we have reviewed why we are here and how to make this session a success for everyone, it's time to start filming.

### Logistical Note:

*Determine the order in which fundraisers will be filmed, and write this order on a flip chart or whiteboard. Designate a timekeeper for each simulation.*

Source: EAB interviews and analysis.

# Facilitator Discussion Guide, Day One

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**Instructions:** Use the guide below to lead each fundraiser feedback period on day one. If possible, keep the ground rules (slide 4) displayed throughout the discussion. *Encourage feedback providers to use the formulas for specific feedback delivery.*

1. Allow the fundraiser to react to the scenario based on their responses on the Participating Fundraiser Feedback form or their feelings immediately following the simulation. Encourage the fundraiser to focus on their strengths and the positive aspects of their performance.
2. Ask the coach who participated in the exercise to share their thoughts. Prompt the coach with the following questions:
  - What was your overall reaction to the simulation?
  - Who did something that you thought was exceptional and you want to highlight?
  - What were the fundraiser's overall strengths?
3. Ask the other observers to contribute their ideas and suggestions to the discussion. This may be based on the Observer Feedback Form or Coach Feedback Form. If necessary, prompt participants with the following questions:
  - What strategies did you observe that worked the best?
  - Did the fundraiser do anything particularly innovative?
  - What should the fundraiser keep doing to be successful in future solicitations?
4. Wrap-up the session:
  - Summarize what has been discussed.
  - Instruct fundraisers to watch their own video three times before day two. (Refer to page 18 for details on re-watching videos.)
    - 1) During the first viewing, with the sound off, focus on physical gestures and body language.
    - 2) During the second viewing, with the sound on, listen to what was said.
    - 3) During the third viewing, with the sound on, put together the verbal and nonverbal elements to notice overall strengths.


Source: EAB interviews and analysis.

# Facilitator Discussion Guide, Day Two

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**Instructions:** Use the guide below to lead each fundraiser feedback period on day two. If possible, keep the ground rules (slide 4) displayed throughout the discussion.

1. Ask each participating fundraiser to share their reactions to watching the simulation video. This should include areas for improvement or constructive comments.
2. Ask the coach who participated in the exercise to share his or her thoughts. Prompt the coach with the following questions:
  - What do you see as the greatest opportunity for growth?
  - What is one aspect of the performance that the fundraiser should work to improve?
3. Ask the other observers to contribute their ideas and suggestions to the discussion. If necessary, prompt participants with the following questions:
  - What were the most common mistakes?
  - How can we resolve those mistakes in the future?
  - Are there other ways to approach the same scenario?
  - What is one aspect of the performance that the fundraiser should work to improve?
  - What is the fundraiser's greatest strength?
4. Include your own comments in order to create talking points for future meetings.
  - What were the most successful talking points?
  - What talking points helped accomplish the goals outlined at the outset of the exercise?
  - Can you think of any talking points that were not used but would have been effective?
5. Wrap-up the session by reviewing the goals and determining ways to move forward.
  - Did we attain the goals we set at the beginning?
  - How will we ensure we continue to work on the takeaways from today?
  - How will we ensure we continue to improve our performance in the future? Is there a way to track, measure, or get a pulse check on our success?
  - Do participants have any ideas for future professional development exercises?

 Participants may wish to keep the Participating Fundraiser Self-Reflection Form in order to note important takeaways. If this is the case, there is no need to destroy these forms at the end of the session.

Source: EAB interviews and analysis.







# Self-Reflection and Feedback Forms

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SECTION

3

- Participating Fundraiser Self-Reflection Form
- Observer Feedback Form
- Coach Feedback Form

# Participating Fundraiser Self-Reflection Form

## Part A: Post-Simulation Reflection Questions

### Participating Fundraiser Instructions:

Use these questions to reflect on the exercise.

- Part A provides questions to consider immediately after participating in the simulation on day one.
- Part B provides questions to consider after reviewing your video three times.

Your Name: \_\_\_\_\_

#### 1. Overall Performance

Choose the box with the text that most closely describes your performance.

<input type="checkbox"/> I set the standard for ideal performance	<input type="checkbox"/> I did a good job overall	<input type="checkbox"/> I did an okay job overall	<input type="checkbox"/> I would like additional training in this area
---	---	--	--

#### 2. Clear Communication

Choose the box with the text that most closely describes your performance.

<input type="checkbox"/> I clearly communicated my role and hit all major talking points	<input type="checkbox"/> I communicated my role and addressed most of the major talking points	<input type="checkbox"/> I used some of the recommended talking points but left out some vital information	<input type="checkbox"/> I was unable to articulate important points or describe my role and left others in the scenario confused
--	--	--	---

#### 3. Active Listening

Choose the box with the text that most closely describes your performance.

<input type="checkbox"/> I allowed the scenario actors ample time to speak and picked-up on verbal and non-verbal cues	<input type="checkbox"/> I allowed the scenario actors time to speak, but did not pick up on all verbal and non-verbal cues	<input type="checkbox"/> I partially listened to other scenario actors and missed some verbal and non-verbal cues	<input type="checkbox"/> I dominated the conversation, not allowing time for scenario actors to speak
--	---	---	---

#### 4. Follow-Up Steps

Choose the box with the text that most closely describes your performance.

<input type="checkbox"/> I clearly established and confirmed next steps	<input type="checkbox"/> I mentioned follow-up but did not confirm a final plan	<input type="checkbox"/> I mentioned follow-up vaguely	<input type="checkbox"/> No clear follow-up steps were established
---	---	--	--

5. What were your strengths during the simulation?

6. What were your biggest challenges during the simulation?

7. Additional comments/ thoughts:

Source: Philanthropy Leadership Council; EAB interviews and analysis.

# Self-Reflection Form (cont.)

## Part B: Post-Video Review Reflection Questions

### Participating Fundraiser Instructions:

Use these questions to reflect on the exercise.

- Part A provides questions to consider immediately after participating in the simulation on day one.
- Part B provides questions to consider after reviewing your video three times.

1. What was your overall reaction to your own video?

2. Did the video reveal anything you didn't realize you were doing?

Yes

No

*If yes, what?*

3. Is there anything you will stop doing as a result of this experience?

4. Is there anything you will start doing as a result of this experience?

5. Are there any areas for which you would like specific feedback on day two?

Source: Philanthropy Leadership Council; EAB interviews and analysis.

# Observer Feedback Form

**Instructions:** Observing participants should use this evaluation form to assess each fundraiser's performance during the simulation exercise. Fill-out one form for each fundraiser you observed. Comments can be shared during the group discussions on both days of the exercise.

**Your Name:** \_\_\_\_\_ **Reviewed Fundraiser's Name:** \_\_\_\_\_

1. Overall Performance

*Choose the box with the text that most closely describes the fundraiser's performance.*

<input type="checkbox"/> Fundraiser set the standard for ideal performance	<input type="checkbox"/> Fundraiser did a good job overall	<input type="checkbox"/> Fundraiser did an okay job overall	<input type="checkbox"/> Fundraiser needs substantial additional training
--	--	---	---

2. Clear Communication

*Choose the box with the text that most closely describes the fundraiser's performance.*

<input type="checkbox"/> Fundraiser clearly communicated their role and hit all major talking points	<input type="checkbox"/> Fundraiser communicated their role and addressed most of the major talking points	<input type="checkbox"/> Fundraiser said some of the recommended talking points but left out some vital information	<input type="checkbox"/> Fundraiser was unable to articulate important points or describe their role and left others in the scenario confused
--	--	---	---

3. Active Listening

*Choose the box with the text that most closely describes the fundraiser's performance.*

<input type="checkbox"/> Fundraiser allowed the scenario actors ample time to speak and picked up on verbal and non-verbal cues	<input type="checkbox"/> Fundraiser allowed the scenario actors time to speak, but did not pick up on all verbal and non-verbal cues	<input type="checkbox"/> Fundraiser partially listened to other scenario actors and missed some verbal and non-verbal cues	<input type="checkbox"/> Fundraiser dominated the conversation, not allowing time for scenario actors to speak
---	--	--	--

4. Follow-Up Steps

*Choose the box with the text that most closely describes the fundraiser's performance.*

<input type="checkbox"/> Fundraiser clearly established and confirmed next steps	<input type="checkbox"/> Fundraiser mentioned follow-up but did not confirm a final plan	<input type="checkbox"/> Fundraiser mentioned follow-up vaguely	<input type="checkbox"/> No clear follow-up steps were established
--	--	---	--

5. What were the fundraiser's greatest strengths?  
*Mention these examples during the discussion on day one.*

6. What could the fundraiser improve in the future?  
*Mention these examples during the discussion on day two.*

7. Additional comments for the fundraiser:

Source: Philanthropy Leadership Council; EAB interviews and analysis.

# Coach Feedback Form

**Instructions:** Coaches should use this evaluation form to assess each fundraiser’s performance during the simulation exercise. Fill-out one form for each fundraiser who completed the simulation exercise. Comments can be shared during the group discussions on both days of the exercise.

**Your Name:** \_\_\_\_\_ **Reviewed Fundraiser’s Name:** \_\_\_\_\_

1. Overall Performance

*Choose the box with the text that most closely describes the fundraiser’s performance.*

<input type="checkbox"/> Fundraiser set the standard for ideal performance	<input type="checkbox"/> Fundraiser did a good job overall	<input type="checkbox"/> Fundraiser did an okay job overall	<input type="checkbox"/> Fundraiser needs substantial additional training
--	--	---	---

2. Clear Communication

*Choose the box with the text that most closely describes the fundraiser’s performance.*

<input type="checkbox"/> Fundraiser clearly communicated their role and hit all major talking points	<input type="checkbox"/> Fundraiser communicated their role and addressed most of the major talking points	<input type="checkbox"/> Fundraiser said some of the recommended talking points but left out some vital information	<input type="checkbox"/> Fundraiser was unable to articulate important points or describe their role and left others in the scenario confused
--	--	---	---

3. Active Listening

*Choose the box with the text that most closely describes the fundraiser’s performance.*

<input type="checkbox"/> Fundraiser allowed the scenario actors ample time to speak and picked up on verbal and non-verbal cues	<input type="checkbox"/> Fundraiser allowed the scenario actors time to speak, but did not pick up on all verbal and non-verbal cues	<input type="checkbox"/> Fundraiser partially listened to other scenario actors and missed some verbal and non-verbal cues	<input type="checkbox"/> Fundraiser dominated the conversation, not allowing time for scenario actors to speak
---	--	--	--

4. Follow-Up Steps

*Choose the box with the text that most closely describes the fundraiser’s performance.*

<input type="checkbox"/> Fundraiser clearly established and confirmed next steps	<input type="checkbox"/> Fundraiser mentioned follow-up but did not confirm a final plan	<input type="checkbox"/> Fundraiser mentioned follow-up vaguely	<input type="checkbox"/> No clear follow-up steps were established
--	--	---	--

5. What were the fundraiser’s greatest strengths?  
*Mention these examples during the discussion on day one.*

6. What could the fundraiser improve in the future?  
*Mention these examples during the discussion on day two.*

7. Additional comments for the fundraiser:

Source: Philanthropy Leadership Council; EAB interviews and analysis.



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