

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.

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