



# Perfecting the Narrative for Big Ideas

Storytelling Workshop Facilitator Guide

# Advancement Forum

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# Leading a Storytelling Workshop

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## A Guide for Facilitators

### Helping Faculty Tell a Good Story

Today's top donors, the "donor investors," seek deep engagement with the institutions they support. They look for big ideas that will change the world, and they want to hear about them from the academic leaders who will be doing the work.

However, the importance of academic partners in working with donors does not mean that their project pitches are automatically donor-ready. The best big ideas will not resonate with donors if a faculty member doesn't describe them effectively.

Hosting a storytelling workshop enables advancement leaders to help faculty members practice and improve their donor-facing pitch. Additionally, the storytelling workshop shows all participants how principal gifts fundraising cannot succeed without a strong partnership between academic leaders and advancement.

### Combining Theory and Practice Opportunities

The storytelling workshop should explain the elements of a good story and allow deans and other academic leaders to practice their narratives and receive feedback. The basics of storytelling can be explained by advancement leaders or by faculty members from related subject areas, who can add additional academic credibility to the session.

Regardless of who explains what makes a good story, ensure that adequate time is dedicated to storytelling practice. Practicing in a comfortable environment shows academic leaders that pitching their ideas to donors does not have to be high-stakes, and that development staff are happy to help strengthen their narrative over time.

In order to make the session as useful as possible, ask academic partners and advancement staff to prepare a narrative or project pitch in advance of the workshop. In order to make the practice environment comfortable for all, avoid inviting academic leaders and their direct reports to the same workshop. For example, deans and department chairs should be invited to separate sessions (instead of attending at the same time).

### Useful Knowledge in or out of Campaign

Storytelling workshops can be useful at any point in (or outside of) the campaign cycle. During campaign planning, the workshop can help academic leaders ensure that their overall vision for the campaign is as strong as possible. During the public phase, fundraisers can help their academic partners refresh priorities and the pitch for them. Outside of a campaign, strong project pitches ensure that deans and department chairs can engage donors who are interested in their area of expertise.

# Facilitator Preparation Checklist

## Instructions

Use the following steps to prepare for and lead a storytelling workshop for academic leaders and/or development staff. Check the box in the column on the right to indicate completion of a step.

Step	Complete
1. Familiarize yourself with the storytelling workshop facilitator materials.	
a. Storytelling Workshop Facilitator Guide	<input type="checkbox"/>
b. Storytelling Workshop Introductory PowerPoint Presentation and Talking Points	<input type="checkbox"/>
2. Update the PowerPoint deck to reflect any institution-specific information as it relates to donor strategy, campaign goals, or storytelling examples.	<input type="checkbox"/>
3. Choose advancement and academic staff to participate in the workshop.	
a. Ensure that advancement staff are paired with the academic leaders from their assigned units.	<input type="checkbox"/>
b. Avoid inviting academic leaders and their direct reports to the same session.	<input type="checkbox"/>
c. Determine if multiple sessions need to be held to reach all advancement and academic staff who should participate.	<input type="checkbox"/>
4. Schedule the workshop as far ahead of time as possible.	
a. Choose a location that will enable participants to pitch a project or narrative to a partner.	<input type="checkbox"/>
b. The workshop itself should last approximately one hour.	<input type="checkbox"/>
c. Assign seats so that academic leaders are partnered with the development contact for their unit or division.	<input type="checkbox"/>
5. Contact participants.	
a. As soon as space has been reserved, send all participants an introductory email with a calendar invitation for the scheduled session (see Introductory Email Templates on page 5).	<input type="checkbox"/>
b. Two weeks before the scheduled workshop, send a reminder email to participants.	<input type="checkbox"/>
6. Gather required supplies for the workshop.	
a. PowerPoint presentation (downloaded on the laptop to be used on the day of the session)	<input type="checkbox"/>
b. Computer, projector, and appropriate cords	<input type="checkbox"/>
c. Printed slides for participants (if desired)	<input type="checkbox"/>
d. Pens and paper for note-taking	<input type="checkbox"/>

# Introductory Email Templates

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## Instructions

Use the following email templates to invite academic leaders and advancement staff to the storytelling workshop. Update the information in italics to reflect the workshop logistics at your institution.

## Workshop Invitation for Academic Partners

Dear Colleagues,

Donors want to hear a good story, and they want to connect with academic leaders as often as possible. In order to strengthen your work with donors and your partnership with advancement, we will be hosting a storytelling workshop on *[date]*. This will be an opportunity to learn more about the expectations of our donors and practice pitching projects to them.

The goal of session is to learn about the expectations of our top donors and practice pitching projects to them. This will also be a chance to increase collaboration between academic divisions and related development staff.

**This workshop will be held on *[date and time]* at *[location]*.**

In order to make the session as effective as possible, please prepare a pitch for a project in your division or unit. The pitch can focus on a specific project, program, or your vision for the unit as a whole. It should last approximately ten minutes. As a reminder, the pitch does not need to be donor-ready, but should be on a topic that you are likely to share with a donor in the future.

Thank you in advance for your participation. We appreciate your willingness to help us make this session a success. Please confirm with me that you will be in attendance, or let me know if you cannot attend but would still like to schedule an alternative practice opportunity.

Please let me know if you have any questions or concerns. I look forward to working together to improve our donor-facing narratives.

Sincerely,

*[Your Name]*

# Introductory Email Templates (cont.)

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## Workshop Invitation for Advancement Staff

Dear Colleagues,

Donors want to hear a good story, and they want to connect with academic leaders as often as possible. In order to ensure that our academic leaders are ready to engage, we will be hosting a storytelling workshop on [date]. This will be an opportunity to provide feedback to your academic partners, strengthen networks across campus, and practice your own pitch to donors.

**This workshop will be held on [date and time] at [location].**

In order to make the session as effective as possible, please prepare a pitch for a project that you would share with a donor. The pitch can focus on a specific project, program, or the overall vision for the unit with which you work most closely. It should last approximately ten minutes. As a reminder, the pitch does not need to be donor-ready, but should be on a topic that you are likely to share with a donor in the future.

Thank you in advance for your participation. We appreciate your willingness to help us make this session a success. Please confirm with me that you will be in attendance.

Please let me know if you have any questions or concerns. I look forward to working together to improve our donor-facing narratives.

Sincerely,

[Your Name]

### Planning for the Interactive Exercises



When determining who to invite to the workshop, ensure that each academic leader in attendance is paired with a fundraiser who works with their unit or division. If the workshop will be advancement-only, consider pairing staff who work on unrelated areas to mimic the experience of speaking with a non-expert donor.



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The best  
practices are  
the ones that  
work for **you.**<sup>SM</sup>

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