

# Perfecting the Narrative for Big Ideas

Storytelling Workshop for Academic Leaders and Advancement Staff

### A New Breed of Donor



### With Heightened Expectations for the Organizations They Support

### An Emerging Donor on Advancement's Mind



Strategic Philanthropy: The Shift in Donor Behavior That's Shaking Up the Nonprofit Sector



Philanthropy: How to Give Away \$1B

PHILANTHROPY

Treat Donors Like Investors, a Top Philanthropist Urges

Donors everywhere are much more strategic and thoughtful about their giving. They want to see data and outcomes. They constantly ask 'Can you show me the numbers?'"

Heidi McCrory Vice President, College Relations Kenyon College

#### The Donor-Investor Seeks



### Transformative Impact

Evidence that their gift has led to change that would not otherwise be possible



## Compelling Ideas

Innovative, largescale solutions to local, national, or global problems



## Credible Connections

Investment in people who can link big ideas to impact

### It Starts with You and Your Faculty



### Faculty Crucial for Identifying Ideas and Impact for Donors

### You Already Have the Information...

### ...and the Necessary Skills



### **Expertise**

Specialized knowledge and training about a specific discipline or issue



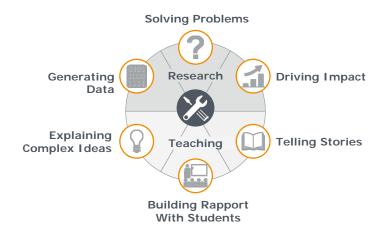
### **Data**

Qualitative and quantitative information about research and results



#### **Narratives**

Passionate, compelling stories about why the research matters



### "Whoever Tells the Best Story Wins"



### Where Faculty Go Wrong

The purposes of this planning process are to improve upon and leverage existing engagement programs, to identify opportunities for additional engagement on campus and to develop a long-term plan for supporting and sustaining such efforts. This project would leverage the knowledge and skills of faculty and staff currently implementing engagement programs to work with campus leaders on a campus-wide engagement plan."

Lacks specific details, unique features, and meaning for non-academic audiences

### **Elements of a Winning Story**



Authentic voice, including imperfections



Provides a sense of time and place



Adds meaning to data

**??** 

### Helping Numbers and Narratives Work Together

"In the past two decades, cognitive science has increasingly come to support the claim that we, as a species, think best when we allow numbers and narratives, abstract information and experiential discourse, to interact, to work together."

Scott Slovic, Ph.D. and Paul Slovic, Ph.D. Editors, Numbers and Nerves: Information, Emotion, and Meaning in a World of Data

### How to "Talk Like TED"



### "Ideas Are the Currency of the 21st Century"



### **Be Emotional**



Be Novel



#### Be Memorable

## You can't inspire others without being inspired

An enthusiastic, meaningful connection to the topic is transmitted to the audience

### Tell stories that engage hearts and minds

Stories help the speaker connect with listeners and make a new idea more convincing

#### Have a conversation

Practice so that delivering the presentation is as comfortable as speaking with a friend

### O Teach the listener something new

Include unexpected elements or give the audience a new way of looking at the world

### Deliver a jaw-dropping moment

Elicit a strong emotional response to grab the listener's attention and make the presentation memorable

#### Lighten-up

Don't take yourself or your topic too seriously

#### Set a Time Limit

Keep the presentation short for successful transmission of ideas

### Paint a mental picture

Allow the audience to envisage concepts that are foreign, complex, or otherwise hard-to-understand

### Stay genuine

Openness, authenticity, and vulnerability are strengths to be cultivated, not weaknesses to erase



### Explaining the Project to Your Grandmother

### Consider Your Audience when Describing Your Work

### Original "Program Overview"

"The program will successfully link concerns over access, diversity, and equity in the United States with a **hemispheric model** of internationalization. We will champion **new paradigms** to offer responses to this challenge that understand U.S. socio-economic and political processes within larger global and hemispheric contexts. This proposal includes **new classes and research agendas, multi-lingual classrooms**, a **strategic cluster hire**, and an **endowed chair**."

### Revised "Value Statement"

"We will **take the lead** in studying the **impact** of internationalization and respond to the **challenges** it presents on a local, regional, and global scale. We will answer questions about access, diversity, and equity through innovative teaching and research, fostering **collaboration among experts** and building a dialogue that is **unique to our institution**.

### **Key Language Elements**



Minimize academic jargon



Clearly focus on shortterm outcomes and long-term impact



Highlight how you are uniquely positioned to have an impact



### Communicating in Donor Investor Terms

Value Category	Sample Terms and Phrases for Donor Investors
Innovation	Academic and translational research leader, innovation incubator, technology pioneer, entrepreneurship center
Competitive Advantage	Attract and retain top talent, improve access to higher education, become the leader in the field, maintain a tradition of excellence
Research Outcomes	Solve global problems, answer societal questions, translate data into impact
Impact	Improvement over time, catalyst for change, local community, regional development, global shift
Financial Performance	Sustainable initiatives, efficient management, seed funding, institutional investments
Recognition	National rankings, faculty awards, public reputation, competitive research grants and fellowships
Progress	Time to reach goal, key milestones, new or additional investment, seed funding
Community Value	Impact on the local community, reach underserved populations, student engagement



### Establishing Clear Ground Rules for Feedback

### Clarifying Volunteer Roles During the Session

#### **Feedback Session Process**

**Establish Ground Rules** 

Clarify what constitutes positive feedback to maximize benefits to all participants

Time for Reflection

Allow participants to consider the presentation before soliciting feedback

Feedback Discussion

**Ouestions include:** 

- · Does this resonate with you?
- · What's missing?
- What other information do you need?
- What would make this more compelling to a donor?

### **Guidelines for Feedback**

#### Feedback Should:

- Focus on improving the narrative
- Target the content of the presentation
- Share donor's knowledge and unique perspective
- Provide direction and cite specific examples

#### Feedback Should Not:

- Criticize without proposing a solution
- Target oration or presentation skills
- Set unrealistic expectations
- Be too general to be helpful

### Crafting a Compelling Narrative

### An Opportunity for Practice and Feedback

### Workshopping Your Narrative

#### Exercise Instructions

**Step 1:** With a partner, share your working narrative or vision for your school or college.

**Step 2:** The partner will listen and then prepare feedback for the narrative to be shared during a feedback session.

**Step 3:** Ask clarifying questions and reframe or adapt your narrative.

**Step 4:** Switch roles and repeat the process.

The exercise will take 10 minutes for each speaker, including feedback.

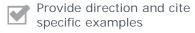
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### Advancement Knows Donors' Questions



### Providing Answers for Predictable Questions



### **Proposal Elements Anticipate Donor Questions**



### **Mission and Purpose**

- What problem are you trying to solve?
- How is your unit uniquely qualified to tackle this problem?

### Goals

- · What action will you take?
- How will you measure success?





### **Fundraising Plan**

- What will the gift fund?
- How will the donor's gift shape the outcome?

### **Impact**

- What will be the benefits of your action?
- Why is this now a pressing need?



### **Predicting Donors' Questions**

### Strengthening Content to Appeal to Donors

### Strengthening Your Narrative

Exercise Instructions

**Step 1:** With the same partner, evaluate whether your project pitch responds to the questions that donors will ask.

- Which questions do you already answer?
- What information should be added?

**Step 2:** The partner will listen and provide advice regarding information that should be added or removed.

**Step 3:** Switch roles and repeat the process.

The exercise will take five minutes for each speaker.

### **Donor Questions to Consider**

#### Narrative Should Include References to:



Unit or division mission and purpose



Project goals



Plan to sustain funding over time



Project impact on a local or global scale

### Reflecting on Visit Execution



### Embedding Feedback and Coaching After the Visit

### **Post-Visit Questions**

Discuss the visit as soon as it is over, starting with the following questions:

- What key thoughts do you have about our interaction with the donor?
- What went well in this visit?
- What could we do better next time?
- What could I do to make the experience better for you?
- Do you have any specific feedback for me?
- Was our preparation helpful? What do we need to remember for the next visit?

### **Effective Feedback**

Share feedback about what did or did not go well using the following guidelines:



Ground comments in specific circumstances





Communicate impact or consequence

### **Next Steps**

Additional Resources Available at **eab.com** 

- The Donor Investor Imperative Study
- Customizable tools and templates



Source: Seashore C, et al., What Did You Say? The Art of Giving and Receiving Feedback, Columbia: Bingham House Books, 1992; Philanthropy Leadership Council, "Ally Storytelling Guide," Resources for Charting Philanthropy's Path to 2020, Washington, DC: The Advisory Board Company, 2015, p. 6; Advancement Forum interviews and analysis.



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