



Perfecting the Narrative for Big Ideas

Storytelling Workshop for Academic Leaders and Advancement Staff

Advancement Forum

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

THE JOURNAL OF
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, large-scale 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

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



Be Novel

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



Be Memorable

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 short-term 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

1

Establish Ground Rules

Clarify what constitutes positive feedback to maximize benefits to all participants



2

Time for Reflection

Allow participants to consider the presentation before soliciting feedback

3

Feedback Discussion

Questions 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



Provide objective impressions and perceptions



Communicate impact or consequence

Next Steps

Additional Resources Available at **eab.com**

- *The Donor Investor Imperative Study*
- Customizable tools and templates





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