



Perfecting the Narrative for Big Ideas

Talking Points for Workshop Facilitators

Perfecting the Narrative for Big Ideas

Storytelling Workshop for Academic Leaders and Advancement Staff

Advancement Forum

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When EAB's Advancement Forum conducted its recent research on The Donor Investor Imperative, it became clear that we will only reach our future advancement goals by renewing partnerships between advancement and the academic enterprise. Donors want to hear about exciting, breakthrough projects from the people doing the work: academic leaders and faculty members.

However, advancement rarely provides opportunities for academic leaders to practice (and strengthen) their pitch to philanthropists. To continue our fundraising success into the future, we (advancement) need to provide more feedback to help deans, department chairs, and faculty members feel comfortable discussing their work with prospective and current and prospective donors.

The goal for today is to start a tradition of practicing the stories we share with donors by:

- Explaining what makes a strong donor-facing pitch, and
- Providing feedback on your own pitch/narrative in a low-stakes environment.

Before we get started, I want to remind everyone that pitching a narrative to a donor is not necessarily a skill that everyone here has had time to practice in-depth. Let's keep feedback constructive and make sure that this remains a comfortable practice environment.

On that note, let's get started with an overview of why we are here today.

A New Breed of Donor



With Heightened Expectations for the Organizations They Support

An Emerging Donor on Advancement's Mind

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

FT Philanthropy: How to Give Away \$1B

THE UNIVERSITY 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

Today's principal and transformational donors have specific expectations for the organizations they support.

- These “donor investors” view their philanthropy as an investment in an institution that can change the world.
- This trend is not limited to higher education. These donors bring the same expectations to any nonprofit organization they support. We are increasingly competing with a wide range of organizations for their support.
- Meeting donor investor expectations requires directly addressing what they seek in any nonprofit organization—compelling ideas for investment with transformative impact promoted through credible connections with the individuals who will do the work.

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



When we think about big ideas, compelling ideas, and credible connections, one thing becomes clear: donors want to engage with academic leaders.

There are some key reasons why this is the case:

- This is your life's work. You can speak about it more genuinely than anyone else.
- You understand the data that you are creating and can the story of why it matters.
- Donors want to connect with the people who are changing the world, not the development staff working behind-the-scenes.

The good news is that the skills needed to engage with donors are the skills you already have thanks to your current work.

- Generating ideas and data,
- Explaining complex ideas to a variety of audiences, and
- Telling stories to put data into context.

Today, we'll focus on perfecting these skills with a donor audience.



“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

When you think about presenting your work to an enthusiastic, but non-expert, audience, it's important to understand what makes a good story:

- An authentic voice: donors want to hear directly from experts in their areas of interest;
- A sense of place and time: why this project can only happen here and now;
- Stories that add details to the data you've uncovered through research.

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

In other words, think about what makes a TED Talk compelling. This slide outlines three core ideas that make them work.

- The best TED Talks are emotional, novel, and memorable.
- Remember that a donor audience is not the same as your academic peers: your presentation doesn't have to be long or all-encompassing to be effective.
- I want to focus on the last bullet in the bottom right: be genuine. A large part of succeeding with donors is being yourself—keep that in mind as we go through the interactive portions of today's workshop.

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

Here’s an example of how we need to think differently about presenting our projects to non-academic audiences.

- In academic work, we use a lot of jargon and overly academic terms that may not make sense to someone outside of academia.
- The example in the upper left comes directly from a project proposal that the EAB research team found on a university website. If you look closely, it has lots of jargon that would mean very little to a non-academic.
- EAB researchers created the revised statement at the bottom, which represents the work, but will be clearer to a donor who is interested in investing in the project. Plus, it’s clearer to advancement staff, who will be responsible for proposing the idea to the donor in the first place.

In the future, when you think about your own work (or for the fundraisers in the room, if you ever have questions about an academic partner’s work), ask yourself “how would I explain this to my grandmother?”

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

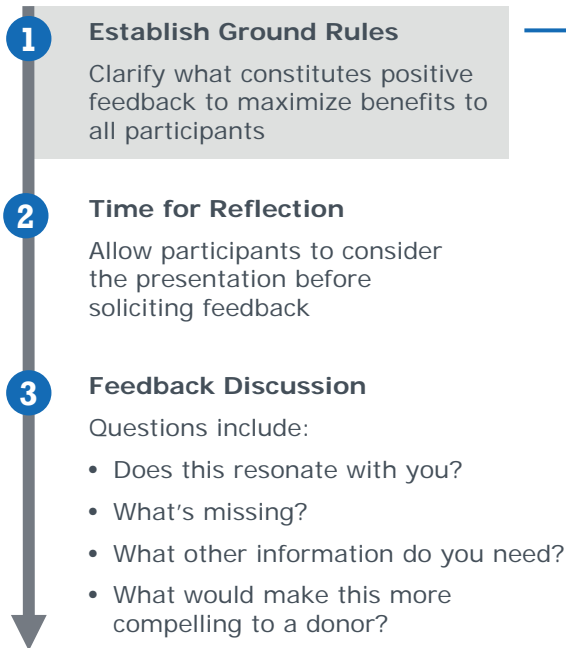
For your reference after this session, here is a list of key terms that a donor investor will respond to.

Feel free to use the sample phrases in your work with donors as well as your work with advancement staff.

Establishing Clear Ground Rules for Feedback

Clarifying Volunteer Roles During the Session

Feedback Session Process



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

Now, we're going to move onto the interactive components of this workshop.

- In advance of this workshop, you were all asked to prepare a pitch for your unit, or a specific project within it.
- Each person will have a chance to pitch their idea. Then, everyone should reflect on the presentation before providing their thoughts on it.
- Before we start pitching, take a look at the guidelines for feedback on the right. Feedback should be targeted and focus solely on improving the narrative.
- Remember that we are not here to criticize without proposing expectations or target oration styles.
- Keep in mind that we all have different levels of experience in pitching ideas to donors, and this is a skill that improves with practice for all of us.

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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- ☐ Be too general to be helpful

Please partner up with someone at your table. You'll take turns sharing your vision or working narrative – the person listening should jot notes and begin to form feedback that will be shared at the conclusion of the process.

- I'm going to give you 10 minutes each (including sharing feedback). At five minutes, I'll let you know that you should move from sharing a narrative to giving feedback.
- Speakers, be sure to ask clarifying questions to ensure that the feedback is as constructive as possible.
- We'll switch speakers after 10 minutes and repeat.

Presenter note: at the end of the exercise, ask participants to reflect on their experience with the group.

Questions may include:

- What was most surprising about this exercise?
- What was the most useful feedback you received today?
- What will you do differently next time or with a donor?

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?



Source: Philanthropy Leadership Council, *Fulfilling the Donor Investor Mandate*, Washington, DC: The Advisory Board Company, 2014, 25-42; "Case for Support," University Advancement, University of Washington, <http://depts.washington.edu/uwadv/central-resources/comm/case-for-support/>; Advancement Forum interviews and analysis.

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Be sure to keep that feedback in mind as you work with donors and advancement staff.

- On this slide, you can see questions that the University of Washington identified as the key questions that donors will ask about your project or pitch.
- You'll want to make sure that your pitch includes references to as many of these ideas as possible.
- Your advancement partners can help you brainstorm other donor questions that you should include in your pitch to make it appealing to donors.

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

Please work with the same partner. You'll take turns evaluation your pitch based on the questions that donors will want to ask.

- I'm going to give you five minutes per pitch for discussion.
- Again, ensure that the feedback is as constructive as possible.
- We'll switch speakers after five minutes and repeat.

Presenter note: at the end of the exercise, ask participants to reflect on their experience with the group.

Questions may include:

- What was most surprising about this exercise?
- What questions had you already answered? What did you have to add?
- What information was easiest to add? What was most challenging to consider?

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



We can use a similar feedback process when working directly with donors.

- Use these post-visit questions as often as possible to strengthen your donor interactions and your working relationship with development staff.
- Practice makes perfect, and reflecting on visits will enable you to build skills over time and perfect your pitch for projects in your unit.

If you'd like more information on today's top donors, or building bridges between academic leaders and advancement, we have access to the full suite of *Donor Investor Imperative* resources at eab.com.

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Thank you again for attending today's workshop. I look forward to hearing how your pitches based on today's feedback.

For additional practice, please work with your development partners would be glad to schedule time in the near future.

The best
practices are
the ones that
work for **you.**SM



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