



NonProfit
HelpDesk



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From Numbers to Narrative: Turning Financials into Stories

TUESDAY AT NOON | FACILITATOR: LEE ANA HESS

NONPROFIT HELPDESK

We're here for you!

- Free Live Workshops
- Archive of Past Workshops
- LinkedIn Community
- Free Expert Support

Find out more at www.nphd.org

These workshops are funded by generous allocations from NYC Council Members



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WORKSHOPS FOR CAPACITY BUILDING & NYC DISCRETIONARY FUNDING



From Logo to Legacy: Building Your Brand Story

Today • 12:00 PM EDT

Free



You Ask, We Answer: NYC Council Discretionary Expense Funding

Tomorrow • 6:30 PM EDT

Free



Nonprofit Excellence - Top 10 Best Practices for Nonprofit Organizations

Tue, May 27 • 12:00 PM EDT

Free



NYC Council Discretionary Funding Q&A w/ NYC Dept of Youth & Community Dev.

Wed, May 28 • 6:30 PM EDT

Free



Submitting the HHS Prequalification (PQL) Application

Wed, Jun 4 • 6:30 PM EDT

Free



Getting Started with Grants

Tue, Jun 10 • 12:00 PM EDT

Free



Navigating NYC PASSPort for Nonprofits

Tue, Jun 10 • 6:30 PM EDT

Free



NYC Council Discretionary Expense Funding: Contracting & Reimbursement

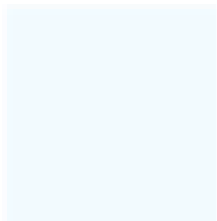
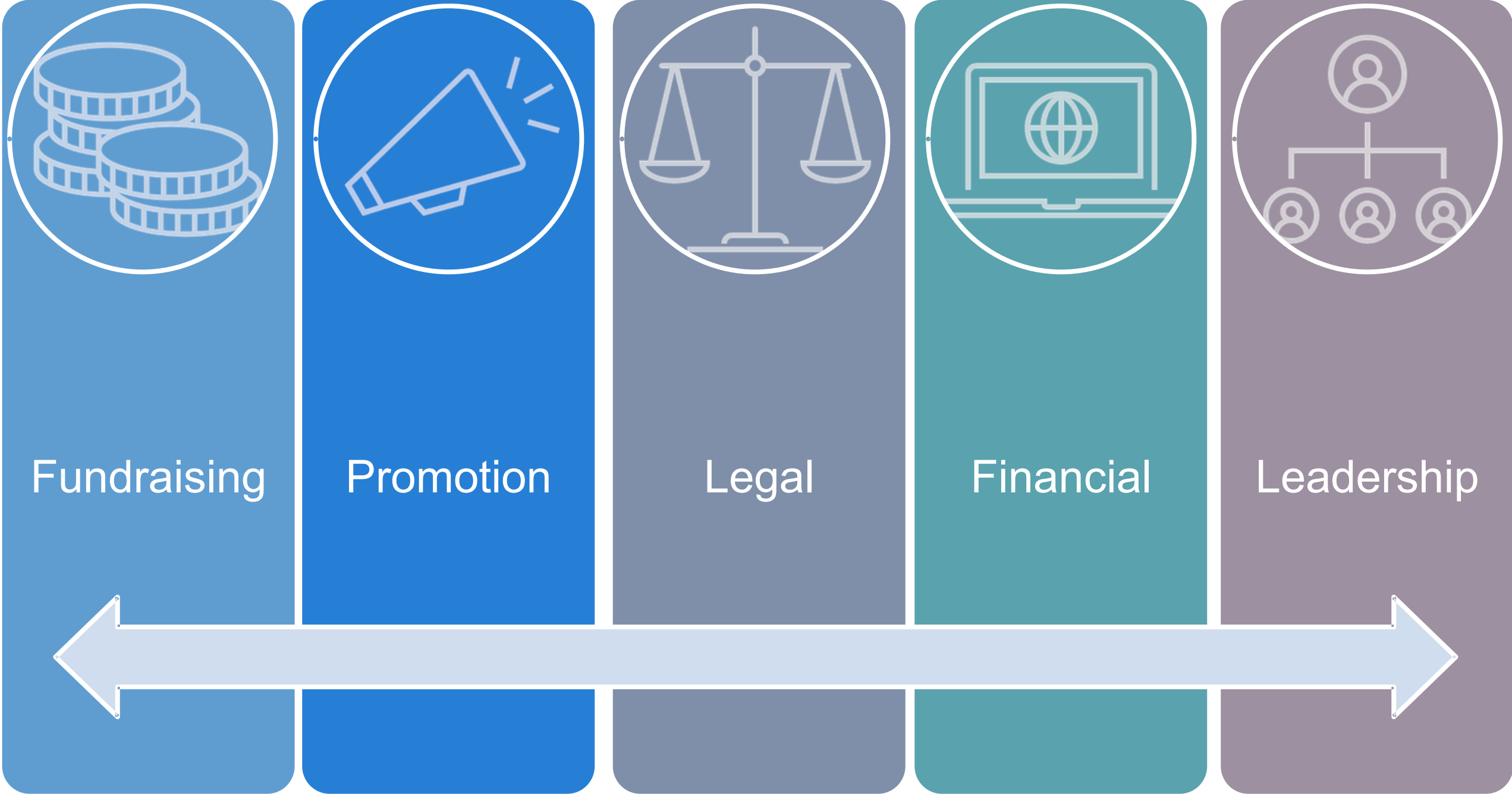
Tue, Jun 17 • 6:30 PM EDT

Free

sample list of workshops, please visit nphd.org for current schedule

HELPDESK FOR A VARIETY OF NEEDS

REQUEST SUPPORT BY COMPLETING A FORM AT WWW.NPHD.ORG!





Give a thumbs up in the chat if you've ever sent a budget report and heard... nothing back.

That silence isn't because your work doesn't matter.

It's because numbers alone rarely move people to act.

This session gives you the tools to change that.

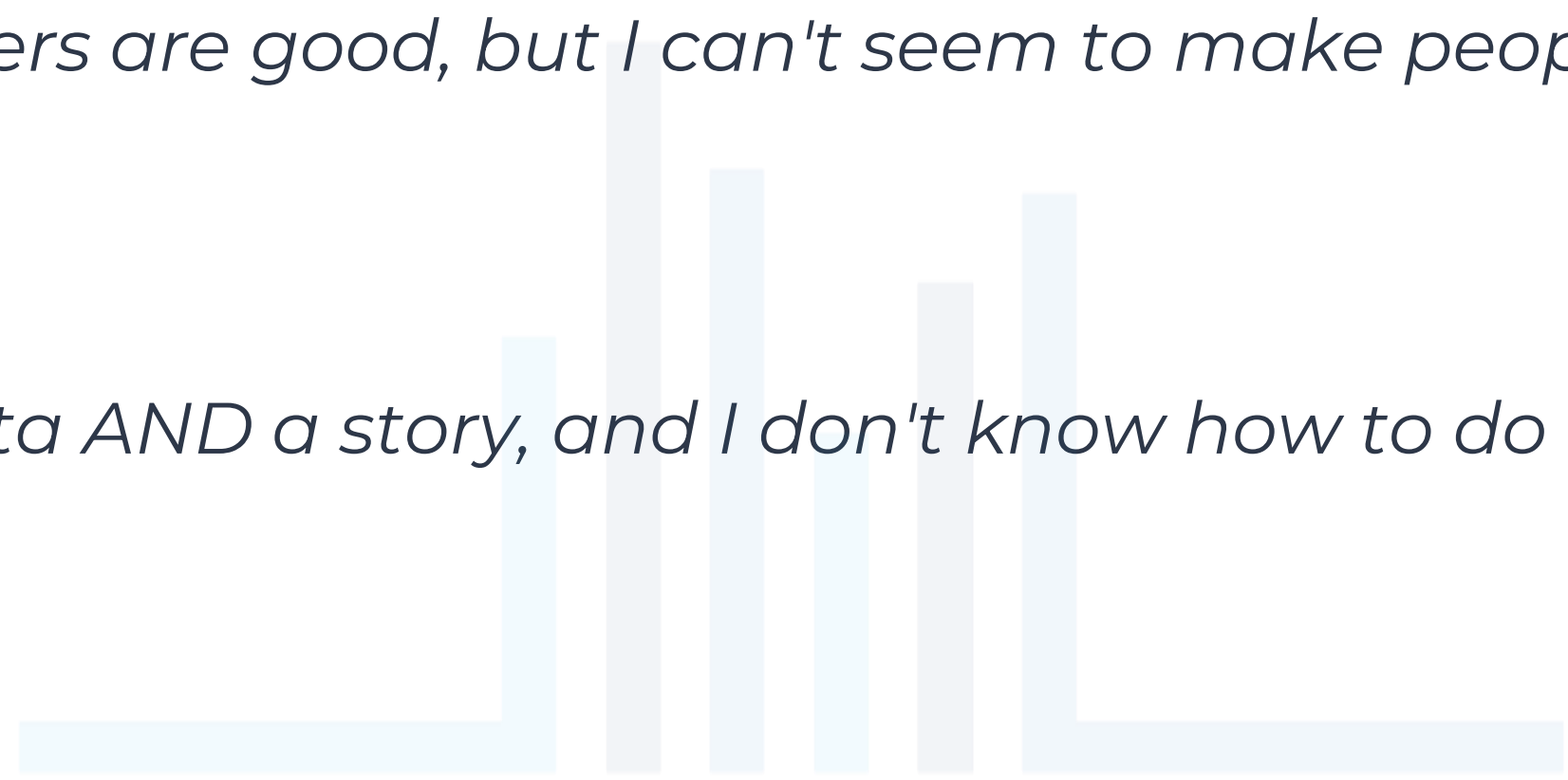
LET'S NAME IT

Most of us were never taught to make numbers feel human.

"I freeze when someone asks me to explain our financials."

"I know the numbers are good, but I can't seem to make people care."

"Funders want data AND a story, and I don't know how to do both."



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THE PROBLEM

The Gap: Finance vs. Mission

FINANCE LANGUAGE

- Variance reports
- Accrual accounting
- Overhead ratios
- Deficit spending
- Audit findings

Precise, but alienating to most audiences.

MISSION LANGUAGE

- Lives changed
- Meals served
- Students who stayed in school
- Families who found housing
- Communities transformed

Moves people to act.

Your job: translate between these two worlds without losing accuracy.

THE REFRAME

Your budget is already a story. You just have to tell it.

THE SPREADSHEET

Line item:
After-School Program
& Enrichment

\$60,000



THE STORY

"This \$60,000 ensures 80 low-income students have a safe place after school with daily tutoring, two nutritious meals, and mentors who believe in them."

Same number. Completely different impact on the reader.



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The 3-Part Narrative Chain



Every budget line maps to this chain. Your goal: surface it.



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The Framework in

INPUTS

\$60,000 — two mentors, supplies, transportation for 80 students, curriculum licensing

ACTIVITIES

5 days/week tutoring · daily meals · 1:1 mentoring · college prep workshops · summer reading challenge

OUTCOMES

80 students served · GPA up 0.4 pts · attendance +20% · 6 students in advanced coursework · zero chronic absenteeism

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QUICK PRACTICE — 3 MINUTES

Turn This Number Into a Story

\$18,500

Mental Health Services

Use the formula:

"Because we invested \$18,500 in mental health services, we were able to _____, resulting in _____."

Your data: 120 youth served · 94% reported reduced anxiety · 3 school counselors trained · 22% drop in disciplinary incidents. Build the story.



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Not all metrics are created equal.

OUTPUT METRICS

What happened

- 80 students enrolled
- 1,400 program hours delivered
- 2,800 meals provided

Shows scale and effort.

OUTCOME METRICS

What changed

- **Attendance increased 20%**
- **Grades improved: 30% of students**
- **6 enrolled in advanced coursework**

Shows your work made a difference. This is what funders invest in and what communities deserve to see.

If a metric needs 3 sentences to explain, it's the wrong metric for your narrative.

The Overhead Myth

THE MYTH

"Low overhead = efficient charity"

This caused nonprofits to starve infrastructure, underinvest in staff, and ultimately underperform on mission.

THE REALITY

Strong HR, data systems, financial controls, and staff training deliver far greater impact per dollar than a chronically under-resourced organization.

Don't apologize for overhead. Explain what it enables.

"It's not overhead. It's infrastructure for impact."



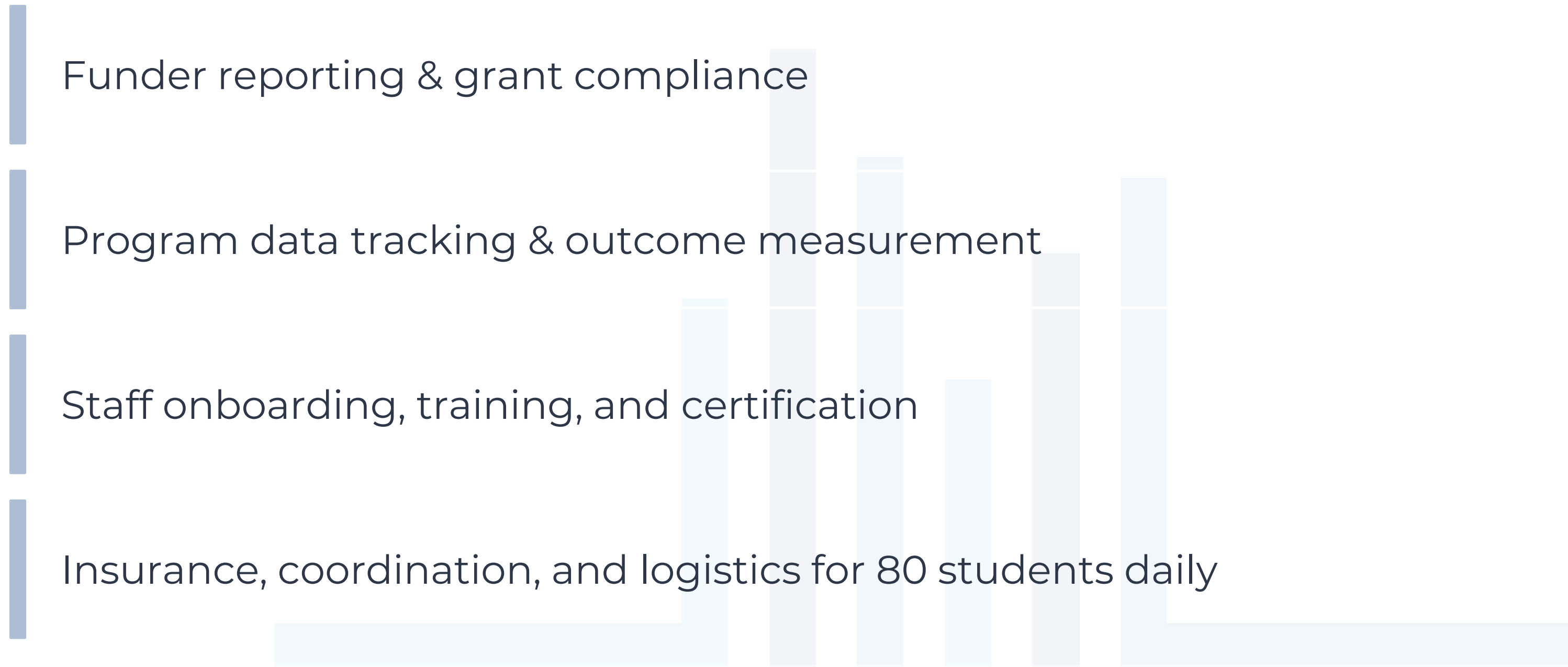
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Admin Costs: \$15,000

20% of total budget



"Our \$15,000 admin investment is what makes \$60,000 in programming possible and accountable."

Same data. Three different stories.

BOARD

They want:

Sustainability

"We ended the year with a \$4,000 surplus and 3 months of reserves. Cost-per-student fell 5%."

FUNDERS

They want:

Outcomes

"Your \$25,000 directly supported 80 students. 30% showed grade improvement exceeding our benchmarks."

PUBLIC

They want:

Human Story

"When Marcus started at BrightPath, he was two grade levels behind. Today, he's in honors math."

Adjust the emphasis. Never the facts.



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**"Because we invested X,
we were able to do Y,
which resulted in Z."**

X = The Input

Y = The Activities

Z = The Outcomes

The formula scales at every level.

PROGRAM

"Because we invested \$60,000 in our after-school program, we provided daily tutoring and meals to 80 students, resulting in a 30% improvement in grades."

STAFF

"Because we invested \$40,000 in two mentors, we delivered 300+ hours of personalized support, resulting in 6 students entering advanced coursework for the first time."

ORGANIZATION

"Because our community invested \$75,000 in BrightPath, we grew by 23% and served 15 more students, resulting in measurable gains for every child in our program."

YOUR TURN! 2 MINUTES

What's your number?

Think of one number from your own budget right now.

Who benefited from this expenditure?

What would NOT have happened without it?

How would you explain it to someone who has never heard of your organization?

Write one sentence: "Because we invested \$___, we were able to ___, resulting in ___."

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Honesty builds more trust than spin.

When results fall short, use context, not excuses. Tell the full picture.

1. Acknowledge

Name the shortfall directly.
Funders and boards respect candor.

“We fell short of our enrollment goal by 12 students.”

2. Contextualize

Explain what caused it.
External forces? A strategic pivot? New learning?

“A mid-year school district policy change disrupted our referral pipeline.”

3. Pivot to Action

Show what you learned and what you’re doing differently.
That’s mission maturity.

“We’ve built two new referral partnerships to reach our goal next year.”



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Transparent storytelling about setbacks signals organizational integrity, not failure.

Key Takeaways

- 1 Your budget is already a story. Give it a voice.
- 2 Use Inputs → Activities → Outcomes to build the chain.
- 3 Tailor the message, not the facts, for each audience.
- 4 "Because X, we did Y, resulting in Z." Use it everywhere.
- 5 Overhead is infrastructure, not waste. Reframe it.



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Resources & Further Learning

Books & Articles

- *Storytelling with Data* by Cole Nussbaumer Knaflic
- *Nonprofit Finance Fund Blog* (nff.org)

Free Online Tools

- *Candid/GuideStar* (candid.org)
- *Datawrapper* (datawrapper.de)
- *Nonprofit Storytelling Conference* (nonprofitstorytelling.com)

Communities & Support

- *Nonprofit Helpdesk/NPHD* (nphd.org),
- *Stanford Social Innovation Review* (ssir.org)
- *BoardSource* (boardsource.org)



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“ Stories are data with a soul.

— Brené Brown

*You already have the data. You already have the mission.
What you now have is the framework to make them matter.*

Your next step: Take one budget line. Write its story. One sentence. Start there.



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THANKS FOR JOINING US!

- Lee Ana Hess
- Organizational strategy and finance consultant
- [linkedin.com/in/lee-ana-hess/](https://www.linkedin.com/in/lee-ana-hess/)



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CLICK 'REQUEST HELPDESK SUPPORT'
TO COMPLETE FORM



**YOUR FEEDBACK
MATTERS!**
**SCAN HERE
FOR A
SURVEY!**