

The Pocket Guide to Finding and Vetting Your Stories

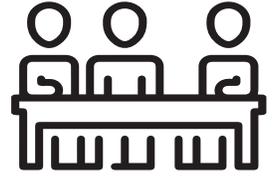


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Find Amazing Stories at Your Institution

1



Find Amazing Stories at Your Institution

The importance of having a variety of opportunities and voices cannot be overstated. Gone are the days when the majority of an organization's supporters give annual gifts out of loyalty to an unrestricted or general fund. Today's supporters want transparency, they demand accountability, and they expect more impactful results from their gifts. They want to know they've made a difference!

Diversity in stories allows the various aspects of good your organization is doing to all take center stage! A variety of storytelling voices allows you to reach and connect with your diverse audience of supporters.

When it comes to finding these storytellers, internal promotion is key. By first looking internally, you'll be able to build awareness and excitement about your platform, develop an administration team for the resource on which you're going to be showcasing your opportunities, locate your first storytelling teams, and gain important feedback and traction for your stories before they're made public.

Where do you find your storytellers? Meetings with department heads, boards of directors, employees, and stakeholders is a great place to start! In-person meetings provide a unique opportunity to brainstorm and spitball ideas. Consider opening a meeting with an exercise.

Objective: Start to identify the philanthropic passions of people within the room.

What you'll need:

- ▶ Post-it notes (a few for each person)
- ▶ Pens/markers (1 for each person)

- 1 Pose the question, "if you were given \$1,000 and you had to gift it away, how would you spend it?" There are no limits or restrictions on where those funds can go. They can be to your organization or to elsewhere. Give people 5 minutes to think and jot down any/all places they'd gift these dollars, one post-it per idea.
- 2 Go around the room and have each person share where they'd contribute their gift(s) and place their post-its on a wall or board. You'll likely have a broad spectrum of passions represented. Notice that very few people will present their area of interest in a way that sounds like they're begging for crumbs. They'll talk about these opportunities with tenderness, compassion, enthusiasm, and a sense that the organization or team they're supporting is tackling an important obstacle.
- 3 As a group, organize the post-its into themes. Are there any large categories like emergency relief, kids, social justice, or community building, that emerge?
- 4 Looking at the large themes, are there stories to be told or giving opportunities that already exist with your organization that pertain to these areas of passion?
- 5 Of the stories that are identified, who are the best people to tell the story?

This exercise is wonderful at moving people away from titles and roles and move towards what makes each person a feeling, caring, inspired individual. By sharing with the group, stories naturally emerge and the group starts to better understand the why behind the gift. The team in the room will start to identify large themes that are meaningful to the group, and the exercise will ultimately transition into the current stories and existing opportunities with your organization.

Consider making this kind of brainstorming part of a quarterly or biannual strategy to identify opportunities/stories. This can also be incorporated into an internal roadshow where meetings are held with all departments to introduce (or remind people about) the platform, discover ideas, and develop a plan for which stories to bring to life. Personal meetings are some of the best ways to discover not only ideas, but the people best suited to tell them.

Outside of personal meetings, what are some other ways that you can make sure people know about your platform and recognize it as a place where they can submit ideas so their opportunities can gain structure, build momentum, and come to life?

- ▶ Physical message boards. If you have one where people see announcements, make sure people know that you're accepting ideas and list your contact information.
- ▶ Intra-office communication. If HR needs everyone in the organization to sign a document, what channel is used to communicate with the team? Use that channel to let people know that they can submit ideas. Do you have a messaging resource that can blast a provocation to everyone? Is there a company-wide distribution list for email that can be used?
- ▶ Social media. Your various social media channels are a very efficient way to spread the word and appeal for storytellers. Consider creating a short video to announce the resource and then interview storytellers after they've successfully funded projects so you can use the clips as promotional material to continue engaging your audiences while providing them with examples of great works that have been funded through the platform.
- ▶ Impacted recipients. Are there people that have benefited from funding in a particular area that can tell their personal story to help inspire ongoing efforts for this cause?

IF YOUR ORGANIZATION IS PART OF A LARGE BUILDING OR CAMPUS, YOU HAVE SOME ADDITIONAL OPPORTUNITIES.

- ▶ Message boards (digital or otherwise). If there are common areas like lobbies, a break room, etc with a means of posting messages, make use of them.
- ▶ Stall Street Journal. If your campus is particularly large, you might have announcements displayed in bathrooms or on the back of stall doors. That's valuable real estate!
- ▶ Digital boards in elevators. Take advantage of a moment of quiet to make sure people know that you're open to ideas and want to help people build and showcase their opportunity.
- ▶ Tabling events. If you have community events where people can learn more about various opportunities around the greater campus, make sure to have a table/booth and some information that can be provided about how to submit an idea to be showcased. Don't narrow your focus on just the foot traffic at the event, also talk with other groups that have tables. Make sure that these groups/teams/organizations know about your platform and start thinking about the needs that they have that could be fulfilled by sharing their story.

Don't forget to look at the information and data that you currently have within your office.

- Analyze your previous efforts. If you have previous efforts to reflect upon, look at what causes or events have done really well. Chances are, there are already passionate storytellers for these opportunities. You should also look at initiatives that didn't gain traction; are there different storytellers or a different, more compelling way to tell the story that might better engage people? Some coaching might make all the difference! Using the new platform, with some intentional guidance, might be a great way to resurrect this effort.
- Look at current needs. Consider ways to wrap a new or different story around already identified needs.

If you're looking to display the wide array of meaningful opportunities that exist within your organization, go right to source, the people that are closest to these possibilities. The personal passion and deep knowledge of the current hardships and areas of impact give authentic, credible voice to the fundraising opportunity. Make sure that the people within your organization know that you have a place where their stories can be told and how to get there.

NEXT STEPS



Plan 1st
brainstorming meeting



Create calendar for personally meeting with additional
departments, teams, and key individuals



Draft announcement to promote platform



Consider 3-6 places where the announcement can be
set, posted, or promoted

Develop an Effective Idea Submission Process

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Develop an Effective Idea Submission Process

You've been hard at work promoting your platform, making sure that people know that they can showcase their stories through your page.

Now, let's look at different ways that they can share their ideas with you:

- ▶ Open door policy. You might consider having something like “office hours” where people can stop by, unannounced, to talk about their ideas.
- ▶ Schedule 1:1 meetings. People can send a short email with a summary of their idea and you can schedule a 1:1 to flesh out details and talk strategy.
- ▶ Phone calls. This one is self-explanatory.
- ▶ Online application. Create an online application to collect the details you need in order to evaluate an idea and determine if it's something that merits further discussion or needs to be refined before it's ready to be nurtured further.

While having an open-door policy, scheduling 1:1 meetings, and talking through ideas over the phone are all great ways to gather details and learn more about people's exciting projects, they require a lot of up-front time to dig into ideas that might not be fully baked and might be challenging to manage in a one-off fashion.

The good news is there is another tactic you can employ: an online application. This is a wonderful way to get the ball rolling in the right direction.

An application allows you to be upfront with the details you need to best evaluate an idea before investing additional time or effort in cultivating a full giving opportunity. You can easily shape your up-front messaging around regulations and rules for campaigns within your organization and detail the types of stories you're looking for. It also affords the individual or team who submits the idea the opportunity to look at what you require to plan out their pitch, goals, etc. before a first meeting.

When it comes to requesting information, there's a sweet spot between gathering important details that begin to paint a picture of the story and requesting so much up-front information that people decide leave the application. When that happens, your storyteller will move to paths of less resistance, like posting the story on their own to a site that doesn't allow you to help steward the process or collect donor data.

Where's the middle ground? There are a few questions that you should require for any person that has an idea they'd like to propose:



Basic contact info - first name, last name, and email address



Story title



Short summary



Fundraising goal



Anticipated duration

There might be additional details that are helpful for you to have to get a better handle on how thoroughly the idea has been thought through. These types of questions might include:

- ▶ More specific details to be used within the summary.
 - What problem is being solved or tackled?
 - » Why this question is important: This can help crystalize the obstacle, monster, or thing to be overcome in the story. It will be important as the person/team develops their full description, video, and call to action to inspire their audience to get involved.
 - Who will benefit from this opportunity being funded?
 - » Why this question is important: If possible, the team should think about a single person who will benefit and tell their fundraising story from his/her perspective. People get overwhelmed when they're confronted by a group that needs help. They don't think their gift will make a dent in the problem, so they don't give at all. Make the opportunity about a single person and people feel like they can make an impact! ([NPR](#))
 - Why do gifts matter?
 - » Why this question is important: This question starts people thinking about the impact that their support will have on the recipient.
 - How will the funds be used?
 - » Why this question is important: In an age where transparency isn't just valued, it's required, break down exactly how funds will be used. This will help an audience better understand the project, needs, and see that the goal isn't arbitrary, but carefully considered. Tell people exactly how their gift of \$20, \$50, \$100 will be leveraged to make this story come to life.

- ▶ Are you working by yourself or with a team?
 - If it's a team, how many members will be actively involved?
 - » Why this question is important: Teams raise over 3x as many gifts as people working solo ([Indiegogo](#)). The additional minds can add creativity and color to storytelling, there's diversity in skills surrounding needs like image creation, video, social media outreach, budget creation, etc., and each person has his/her own audience to reach.

- ▶ Are you willing to ask friends and family to support your story?
 - » Why this question is important: Don't fall victim to the fallacy that "If you build it, they will fund." People aren't going to just stumble upon the story and decide to support it. People don't open a browser and think "what am I going to help fund today?" 80-90% of the support received will be from traffic the storyteller/team drives there themselves. They HAVE to be not only willing but excited to share their story with those closest to them. If they can't get people who care about them to support their cause, they're not going to convince strangers.

Some groups also have terms and conditions or guidelines to which the idea submitter must agree to before they can submit the application.

CLICK BELOW FOR ADDITIONAL RESOURCES ON HOW TO CRAFT YOUR OWN PLATFORM GUIDELINES

EXAMPLE

TEMPLATE

When it boils down, you want to keep the barrier to entry low so that people feel empowered to submit their ideas, so don't go overboard with a litany of very specific questions. You're just getting a snapshot of the idea and you're making sure that the campaign submitter has starting thinking through the opportunity. You can always work with the person/team to fill in gaps once you've determined if the idea is something that your organization is interested in showcasing.

NEXT STEPS



Consider the (approximately) 7-12 most important questions that you need to capture



Brainstorm how people will find your form to submit an idea



Draft an idea rejection message



Develop a plan for next-steps when an idea is approved, including when the team should hear from your office



Post a link to your form in the places you've identified

Vet and Prepare Your Storytellers

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Vet and Prepare Your Storytellers

Grab your advisor hat! By the time the call is out and storytellers could begin knocking on your door, you should be prepared for the education and relationship management that lies ahead.

For some storytellers, this may be their very first venture into the world of fundraising. Expect questions and misconceptions needing clarification.

Those that have experience with fundraising campaigns may be a further along, but there's no guarantee that their conceptions match the goals and approach of your institution's fundraising office or the particular initiative.

You should be prepared to clarify their purpose as storyteller in the bigger picture, define their role and expectations, and generally foster a constructive partnership that (hopefully!) will even extend beyond the initiative at hand.

Through thoughtful cultivation, your storytellers will feel appreciated for their commitment, satisfied with the process, and eager to continue participating. Your dedication to a harmonious relationship will build your team of storytellers over time, greatly expanding your fundraising office's capacity.

HERE ARE THE STEPS YOU SHOULD TAKE TO BE FULLY PREPARED IN GUIDING YOUR STORYTELLERS

Understand Your Storytellers

Start by putting yourself in the shoes of your potential storytellers. Tailor your preparation to them. Consider:

- ▶ Who are your storytellers?
- ▶ What don't you know about them?
- ▶ What is in it for them?
- ▶ Where might they need education?
- ▶ Where might they need boundaries?

Get Ready to Educate

As their liaison to the fundraising office and the initiative, you'll want to prepare talking points around these big ideas:

- ▶ What is the purpose of fundraising at your organization? What are the fundraising goals?
- ▶ What is the purpose giving initiative? What are the goals?
- ▶ Why digital engagement?
- ▶ How does their story fit into the bigger picture of the initiative?
- ▶ What is to gain for the storyteller, the cause, and the institution?
- ▶ What is an appropriate timeline for preparing a story, promoting, fundraising, and stewardship?

Facilitate Dialogue

Start communicating with your storytellers in person, by phone, or digitally. The more personal the better!

Consider these fundamentals to fostering strong partnerships:

- **Listen:** ensure your storytellers are being heard and appreciated
- **Learn:** storytellers are experts of their areas. There's always something to learn that could impact future fundraising efforts
- **Collaborate:** remain open to ideas and unique proposals
- **Be specific:** articulate clear expectations and steps
- **Be transparent:** foster trust and partnership

Start communications by getting the storyteller talking about their idea. Foster their excitement conviction to the cause. Here are some questions to help you further evaluate their idea and identify where they may need direction when developing content:

- ▶ What is the “elevator pitch” for their idea?
- ▶ What are the most exciting aspects of the idea and its impact?
- ▶ Why is this idea a priority?
- ▶ What impact will the idea make? On your organization, your community, our world?
- ▶ How do you define success when it comes to support for the idea?

Moving Forward Together

When it is clear you will involve the storyteller, dive in to exactly what you're asking them to develop. Be ready with examples. Describe a hypothetical, ideal example or point to a specific campaign as a model. Reference the timeframes and steps involved to successfully promote campaigns.

You can consult this Planning Guide to develop the specific steps you want your own storytellers to walk through when planning out their campaign:

CAMPAIGN PLANNING ACCELERATOR

Your goal is to clarify their understanding of the process early to avoid hiccups down the road. Lay out storyteller requirements in clear, specific detail. You'll see best results when the storyteller knows exactly what they're in for and has a specific list of tasks to work against. As storytellers are much closer to the story than you are, you should ask that they leverage their unique view and network and help with promotion in addition to content creation.

▶ **Content commitments**

- Length, level of detail, and format?
- Photo requirements?
- Video requirements?

▶ **Content development process**

- Timelines - when are due dates?
- Communication process - what is the flow of submitting content and any process for reviewing/editing draft content?

▶ **Promotion**

- How much? On what timeline?
- Which channels?
- Stewardship and post-campaign updates?

▶ **What else are you asking of them? Put it all on the table right away.**

Seek confirmation of buy-in from your storyteller before moving forward. You might consider a “contract” that outlines their commitment. You may be comfortable with a much less formal approach, though seek a verbal “Yes” whenever possible.

When it comes to locking down commitment, it is helpful to highlight others that are taking on the task. This social proof goes a long way in validating that their commitment is worthwhile: they'll be joining an in-group with special purpose. If you rally their enthusiasm enough, you reap the bonus of your storyteller recruiting other storytellers!

If you've done your due diligence, your storyteller will understand:

1. Their tasks and the guidelines they must follow
2. The resources available to them
3. Where to go for help
4. The value of their work

NEXT STEPS



Prepare talking points about fundraising, the initiative, and the role of the storyteller



Develop guidelines, timelines, and any other storyteller commitments



Collect (or create) examples for storytellers