



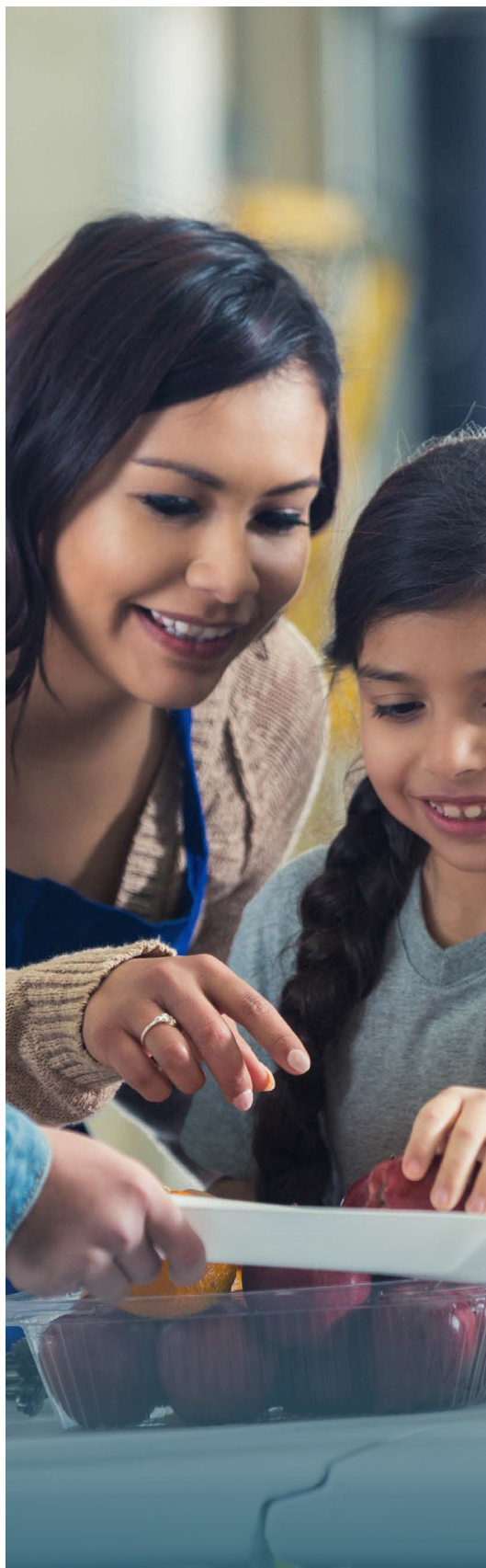
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An Allegiance Group + Pursuant Resource

Behind the Story

Collecting Story Research
for Effective Fundraising



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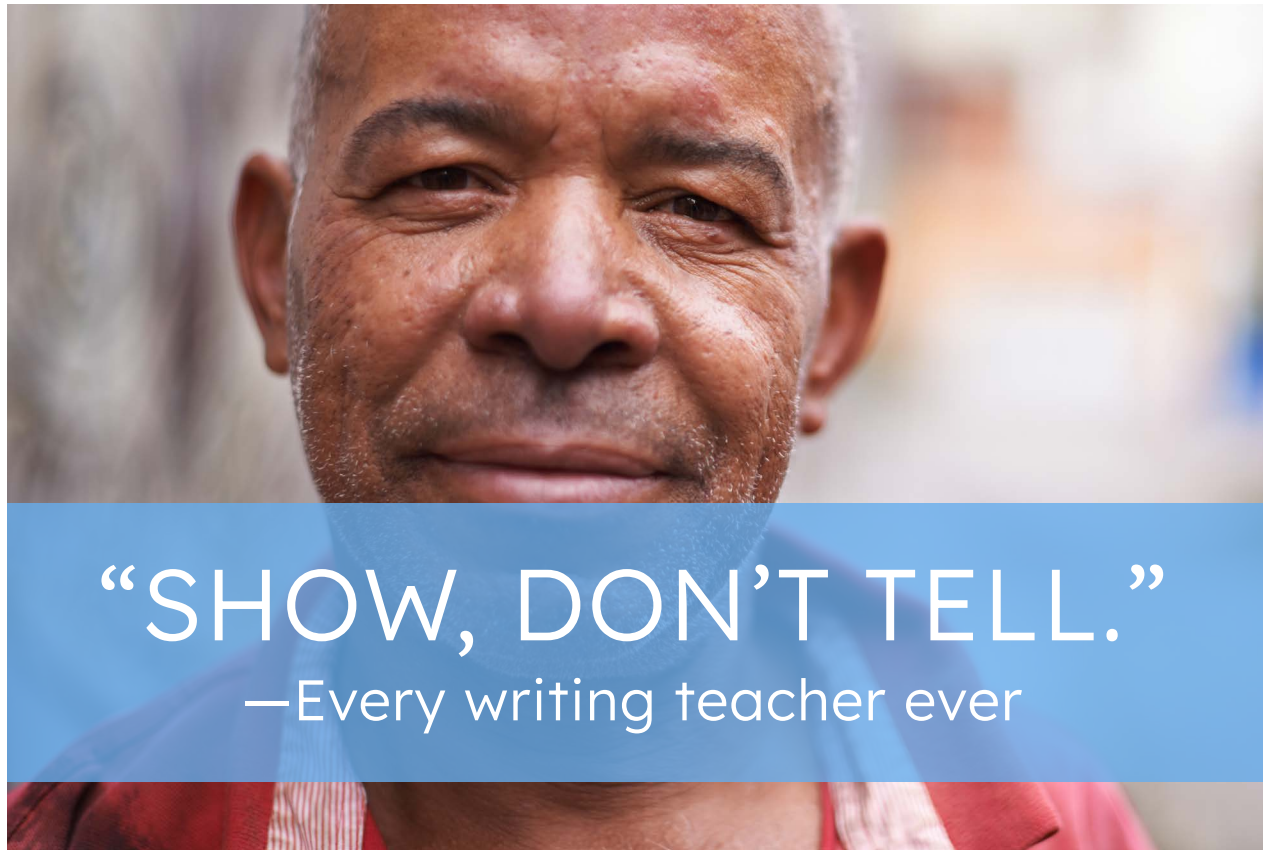
Sample artist release form

Introduction: Why stories?

It's a truism of fundraising: People don't give to organizations, they give to people.

Telling stories is the quickest way to help donors and potential donors see the people at your organization—whether that's staff or those who benefit from your work.

When you share information via statistics and facts, 10 minutes later only 5 percent of people will remember that information. Stories can stay with us for a lifetime. You can tell someone what you do, but it's far more emotionally connecting and memorable to show them. When you can't show them in person, a story is the next best thing.



What is a story?

Many “stories” currently found in fundraising are actually collections of facts. For example:

Every year, 500,000 animals are brought to shelters in Illinois—animals like Rex, who came to us with a broken leg. After some expert vet care, Rex went on to find a new family.

Is this a story? What details make Rex stand out to you as an individual? What about this connects you emotionally to Rex or to the people who helped him? Contrast that with:

Rex didn't know what happened. A flash of metal, a squeal of brakes and suddenly his leg hurt so much! He pulled himself to the side of the road and lay there panting from the pain. That's where a good Samaritan found the shaggy brown pup and brought him to us. Our vet team was able to set Rex's leg but it was clear he'd learned the hard way never to trust a human. It took three months with a very patient foster family to mend his broken heart. Very soon, he met a family with two active children who are happy to encourage his new passion—tennis balls!

Is it more words? Yep. Is it going to raise more money because it makes your donors feel something? Also yep. It's another fundraising truism that most giving decisions are primarily emotional, although the rational mind works quickly to justify the decision. That's why whether it's about a beneficiary, staff member, volunteer, or donor, a story needs to be:

REAL filled with enough factual and sensory detail to create a mental picture and make the “characters” stand out as individuals.

RELATABLE put into terms the reader can understand and connect with emotionally, i.e. no jargon or fancy stuff, just simple but emotive words.

RELEVANT speaking to the values your reader shares with your organization and related to the ask, e.g. if you're raising money for winter needs don't tell a summer story.

THE STORY SPINE

Created by Kenn Adams

A simple outline
for storytelling:

Once upon a time...

(Intro, our protagonist)

and every day...

until one day...

and because of that...

and because of that...

and because of that...

until finally...

(The progress from the old
reality to crisis to seeking
help to solution)

and since that day...

(The new reality)

**and the moral of the
story is...**

(The wider truth or
application)



How can you tell if you're capturing research for a story versus a collection of facts? Think about your favorite movie. What scenes and emotions stick in your mind? Is there anything with the same vividness and emotional weight in the research you're capturing?

Your writer can only paint the picture if you give them some colors to work with. The rest of this guide exists to help you gather the right information to build effective stories.

Crucial Note

In fundraising terms, the story is not the same thing as the offer. Every great story should be paired with a great offer—a concrete explanation of how the donor's gift can enable more transformations like the one that has just now touched their heart. The story supports the offer by demonstrating:

- That donor support is an integral part of changing lives/situations through the organization
- That the work of the organization truly matters
- That the organization uses donor support effectively to enact real change

Collecting Stories: Interview Tips

Be Prepared

Before you begin interviewing, decide on your policy: Will interviewees be allowed to review their stories before they're printed? Your interviewees may ask, so it's good to have a policy set beforehand.

Stories with names—even just a first name or a first name and last initial—appear more “real” to the reader, so create a consent form to keep with the story. Will stories “expire” or will you have permission to use them as long as you want? If they do not “expire,” your policy may need to be that interviewees do not review their story each time it's used.

A good story can be used for years in a variety of formats; if it's a truly inspiring story, even donors who have seen it before will often enjoy being reminded of it. However, if you're working with children, you may want to retire a story when the child reaches the teens or adulthood. It may be helpful to determine when the story will be retired and keep that future date with the interview notes.

Similarly, you may want to develop a process to retire a story if a conflict develops with the interviewee—severing ties with your organization, unacceptable behavior, or the like. Before using an older story, it's best to check with your program staff to ensure it's still viable.

Consider how you're going to store and catalog your stories for future use. You might consider a spreadsheet system that lists such things as the name of the interviewee, date, name and location of the interview notes, keywords or relevant programs, a one-sentence description, and a list of dates and media in which the story is used.

Capture the voice

It is usually more effective to let someone tell some or all of their story in their own words—even if some of those words are “off brand”—than to tell their story for them.

When it comes to beneficiaries of your services, particularly if you work with BIPOC or marginalized communities, telling someone's story in their own words can be an issue of social justice. We need to think carefully before taking someone's voice away from them. Speaking for people instead of letting them speak for themselves can perpetuate negative stereotypes that they are voiceless, helpless, and sitting passively by waiting to be rescued. More than anything, it can contribute to the feeling that our beneficiaries are "other" instead of being our neighbors.

Letting someone tell their story in their own words can also help you bypass internal reviewers who like to "sanitize" your emotional copy, because it's their words, not yours. Lastly, it's nearly always better to let someone else talk about how great your services are, instead of talking about it yourself.

Whenever possible, record your interview to ensure you keep the flavor of what's said. If recording isn't possible, do your best to take some "verbatim" notes. If you're not interviewing in person, consider using Zoom or another similar platform that will let you easily record both audio and video; you may be able to use clips of the video.

Be human

Whether your interviewee is a fellow staff member, a beneficiary of your services, a donor, or another friend of your organization, the best interviews happen when the interviewee is comfortable.

- Approach the interview as a conversation, not a series of rapid-fire questions
- Frame the conversation: We're asking for your help to show people why this matters so much, so that they'll be motivated to give and we can do more good
- Overcome fear: Let the interviewee know up front that if they say anything they don't want shared, they can tell you and you'll leave it out
- Practice active listening (many tips are available online)
- Resist the urge to interject your own thoughts and opinions; let your interviewee do 80% of the talking
- Be grateful: Remember that especially for service beneficiaries, the story may be painful and sharing it is a gift to you

Pursue Details

You are probably not a news outlet. Your stories do not need to conform to the rules for unbiased reporting. Don't be afraid to ask leading questions/make mirroring statements if all you're getting are the bare facts:

- Did that make you angry?
- It sounds like that was a very lonely time for you.
- That must have been such an exciting moment!
- Did you feel relieved?
- That was a real journey for your whole family.
- You were so brave.

Don't be afraid to use silence during the interview to encourage the interviewee to expand.

A writer would always rather have too much to work with than too little. Gather as much detailed, specific information as you can within your interview time and let the writer sort it out!



Collecting Stories: Questions to Ask

Wherever possible, ask open-ended questions—the kind that give your interviewee scope to share their thoughts and emotions. So instead of, “Do you think our organization’s role in the community is important?” ask, “What do you think of our organization’s role in the community?”

Here are some examples by type of interviewee:

“Internal” stories—staff and volunteers:

- What makes you passionate about this organization? Why does it matter to you?
- Is there a moment that defines your passion or changed your thinking? How and why?
- What’s the most memorable experience you’ve had with someone served by the organization? What happened to cause them to ask for help from us? What are we doing to help them?
- What is your favorite thing about this person? Why do you want to help them?
- Is there anyone you’ve met lately who made you proud we exist? Tell me about them and how YOU have indirectly or directly helped them.
- How did that experience make you feel? What was it like?
- How does that experience highlight for you why this work is important?
- How has your work at the organization changed you? What do you get out of it?



“External” stories—people helped by the organization:

- What was your situation like before you discovered the organization?
- How did you feel in that situation?
- What one moment in your life summed up the situation? A moment you realized just how big the problem was?
- How did that situation affect your kids?
- How did you hear about the organization?
- How did you feel when you got help here?
- What two specific things did you learn that changed your thinking?
- What was that moment like? What did you do?
- Why was that so important?
- What changed in your life as a result of that?
- Can you expand on that a little?
- What did the kids think of all that?
- How is your life different now because of that?
- Have people outside your family noticed the change?

“External” stories—donors not helped by the organization:

(For donors who have also been helped, add the other external questions as needed)

- How did you first hear about the organization?
- Why does this work matter to you? Was there a person or moment that inspired your passion for this cause?
- Why did you decide to become a donor?
- How does it make you feel to be involved?
- Do you feel like your donations are being well used? Why?
- What do you think this organization does better than any other like it?

Anybody:

- What would you like to say to the donors whose support makes this work possible?
(Frequently gathers some of the most interesting and varied answers.)
- If someone was thinking about giving to the organization but wasn't sure, what would you tell them?

Here is another list of suggestions for various audiences by
Lori Jacob with from Boring2Brilliant:

WHO TO ASK	SOME OPEN-ENDED QUESTIONS TO START WITH ... ADD YOUR OWN
People you serve	• What was your life like before you came here? • How has our team helped you? • What is your life like now?
Family members of people you serve	• What are the differences you've seen in your loved one's life since they came to us?
Board members & Former members	• Why did you join our board? • What is the most important part of our work for you? • Do you have a special "mission moment" you remember about someone you met who was helped by our organization?
Long-time donors	• Why do you make a financial gift to us? • What is special for you about our work? • Do you have a special "mission moment" you remember about someone you met who was helped by our organization?
First-time donors	• What brought you to us in the first place? • What is special for you about our work?
Other staff	• Do you have a special "mission moment" you remember about someone you met who was helped by our organization?
Foundations	• Why have you funded our programs? • What is different/special about our work that compels your foundation to make a grant?
Event sponsors	• What do you know about our work? • Why do you make a financial gift to us? • Do you have a special "mission moment" you remember about someone you met who was helped by our organization?
Vendors	• What do you know about our work? • Do you have a special "mission moment" you remember about someone you met who was helped by our organization?
Elected officials	• What do you know about our work? • Do you have a special "mission moment" you remember about someone you met who was helped by our organization?

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Collecting Photography

A picture really is worth 1,000 words if it tells a compelling story.

It's important to gather high resolution image assets to complement the story. An image can hook an audience and connect with them instantly. This can lead to more people emotionally connected to the story, and they are more likely to engage further in the written content.

It is important that the image(s) feel hopeful, candid, and real to the story that is being communicated. Inauthentic, cheesy stock-like images can put off readers, making them feel like the story was fabricated.

We know not everyone has the luxury of a professional photographer or equipment, but using a few simple tips below, a smartphone or point-and-click camera can do the trick.





Lighting

- Shoot in overcast, indirect sunlight or outdoors during dusk or dawn whenever possible.
- When shooting indoors, find a window (without direct sunlight streaming in) and angle the featured persons 45 degrees from that window to cast highlights on the face and fill in shadows.

Remember to check your organization's brand standards to ensure that you're setting up your photography to align. No brand standards? Now might be the time to develop some, especially if you have multiple photographers. For example: Will you use photos that portray the "before" or only the "after"? Will you focus on portraits and faces, or action shots?

Posing

- Testing has shown that photos of people making direct eye contact with the viewer are more compelling and increase response, especially in photos of need. Try for photos in which at least one person is looking at the camera; avoid photos where most or all of the people have their backs to the camera.
- Have the person(s) doing something natural like reading a book or Bible, fixing a snack for kids, etc. If multiple people are in the shot, have them interacting with each other in a casual way. Give them a question or small action and click away.
- People are most flattering at a 45-degree angle versus directly facing camera.
- Relax and have fun. Many times "The Shot" is the shot between shots, so remember to keep clicking.

Troubleshooting: I Can't Find Good Stories

When a nonprofit is truly living out its mission to impact people and change the world for the better, good stories are everywhere. The trick is capturing them.

Story-finding, and story-gathering, should be part of your frontline staff's job description. At the very least, they should be attuned to good story possibilities and direct the development staff to them, or be prepared to share their own "take" on emotional/inspiring events.

However, it's on development staff to build relationships with the frontline staff so they feel comfortable and motivated to bring their stories to you. Remember: people do things for people they like. Break down that organizational silo and make some new friends!

Passive story-gathering—waiting for people to contact the organization—is not enough. It leaves the organization at the mercy of whoever happens to share, which does not always mean the best stories. A few ideas for intentional story-gathering are:

- Solicit stories from beneficiaries in program applications, surveys, and in the field.
- Call five loyal donors/volunteers a week to thank them for their support and ask them why they give/volunteer. Dig deeper if it seems warranted, and remember, even a brief "here's why I support the organization" quote can be great on your website or in a brochure.
- Call five frontline staff or volunteers each week and ask them for the most exciting or moving thing that happened that week. Or create an organization-wide "weekly report" to which every person is expected to contribute, and follow up on the most promising leads.
- Add an optional comment box after your donor has completed his or her online gift asking, "Would you tell us what inspired your gift?" Be prepared to follow up.
- Start staff meetings with a story from a different person each time. Designate one person to pursue more detail on any that are especially impactful.

- Have program staff write blog posts on beneficiary or volunteer stories.
- Reward what you want more of and set a model example of storytelling.
- Ask a question once a month on social media, such as, “How has the organization impacted your life?” or “What is the most important thing to you about the organization?” Follow up via private message with people whose answers look like they could turn into stories and ask if they’d be willing to share more. Set up a phone call if so.

They will not all be great stories. In fact, you may wind up using just 10% of what you gather. But it will be the most moving, most engaging, most motivating 10% because you will have enough material not to be forced to settle for the mediocre.

Remember that your best stories can be used repeatedly and in different contexts. Many long-time donors may enjoy being reminded of the details of a favorite story (ever watch a movie more than once?) and newer donors on your file will not have seen it before.

Troubleshooting: Our Stories All Sound the Same

You are not alone. Especially if your organization has a very specific purpose, the bare facts of many of your stories may be very similar.

But this is exactly the point of emphasizing detail and depth in story-gathering. With these, your writer can vary the stories by choosing to focus on certain themes. One student-athlete may have had a family tragedy and be motivated by that to be their best. Another might have aspirations to leverage a successful sports career to make a social impact. Their story arcs might be similar, but the details will make them different and relatable.

And not all stories are about a long journey. A good story could be a life-changing instant or heartwarming event that takes only a few minutes, an hour, or a day but leaves the participants with a new insight or affirmation of why the work matters.

A story doesn't even have to be "finished." The story can be ongoing, demonstrating that the donor's support will continue to make a difference in this situation.

Every person is unique, and every person has a story. Good story-gathering means finding those points of uniqueness so that your writer can convey them to your donors.

Troubleshooting: We Can't Use Real Names/Photos

If you're working with youth, abuse victims, or other sensitive populations, or in the medical field, there's a good chance you can't use real names or photos most of the time.

Here's the thing: Your donors get that. They give to you because they believe in what you do, and because they believe, they don't want to put your beneficiaries at risk any more than you do.

For stories, use a pseudonym and flag it as such, "Mary's name has been changed for her privacy/protection." Having a name, even a pseudonym, makes the person more real to your donors. If necessary, you can even use composite stories as long as they're rich enough in detail to feel authentic.

For photos, sometimes you can get away with stock photography that isn't too posed/perfect, with a disclaimer, "Mary is not pictured." But another approach is to take emotive photos that don't show faces: a child bent over his first picture book, a woman's clasped hands, the car where a homeless family lived.

Troubleshooting: Our Direct Beneficiaries Aren't People

You're saving the bumblebees, which refuse to take interviews. You can still write a letter from the bumblebee's point of view. Check out this highly successful mailing from Ontario Nature: <https://sofii.org/case-study/ontario-natures-ruby-the-hummingbird-mailing>.

You can also interview a child about why they love bumblebees. You can interview an entomologist about what bumblebees do for the environment. You can interview a staff member with a unique story.

Your direct beneficiaries may not be people, but if your cause didn't matter to people, it wouldn't be worth supporting. Find the people who are passionate about the cause. Tell their stories.

Even when your direct beneficiaries are human, using an unusual narrator can add a different dimension to your fundraising!



Appendix:

Sample Consent Forms

INDIVIDUAL OR FAMILY

I grant permission to [Organization] to use photographs, video and/or interviews taken of me and/or my children. I understand that the purpose of the photography/video/interviews is to increase public awareness of [Organization] and its work. I understand the photographs/video/interviews may be used in [Organization] promotion and publications such as brochures, newsletters, billboards, print ads, appeals, emails, social media, online ads, the [Organization] website or other media. I understand that the photos/video/interviews may be used for an unlimited amount of time and may not be sold.

I hereby waive any right to inspect or approve the finished photographs/video/interviews, printed or electronic matter that may be used in conjunction with them now or in the future, whether that use is known to me or unknown. I waive any right to royalties or other compensation arising from or related to the use of the photograph or video.

I, on behalf of myself or any other persons who may have interest in this matter, hereby release, defend, and hold harmless [Organization], and/or employees thereof, from all legal responsibility and liability that may arise from the act I hereby authorize. I understand that at all times [Organization] will respect my rights, my children's rights and our dignity as individuals.

I am 18 years of age or older and I am competent to contract in my own name. I have read this release before signing below, and I fully understand the contents, meaning, and impact of this release.

My first name **may** or **may not** (please circle one) be used in connection with my photo or video.

Name (please print): _____ Date: _____

Signature: _____

Please print child's or children's first and last names below:

PLEASE NOTE: These sample forms are only a starting point. Be sure to consult your legal team, if you have one, or seek advice from a legal professional.

CHILD UNDER 18

Whereas, [organization name] (the “Producer”) is engaged in a project (the “Appeal”), and

Whereas, I, the undersigned, am the parent of legal guardian of the minor child under the age of 18 appearing in the Appeal, and

Whereas, I understand that the voice, name, and image of the minor will be recorded by various mechanical and electrical means of all descriptions (such recordings, any piece thereof, the contents therein and all reproductions thereof, along with the utilization of their name, shall be collectively referred to herein as the “Released Subject Matter”).

Therefore, receipt of which is hereby acknowledged and whose sufficiency as consideration I affirm, I hereby freely and without restraint consent to and give to the Producer and its agents or assigns or anyone authorized by the Producer, (collectively referred to herein as the “Releasees”) the unrestrained right in perpetuity to own, utilize, or alter the Released Subject Matter, in any manner the Releasees may see fit and for any purpose whatsoever, all of the foregoing to be without limitation of any kind. Without limiting the generality of the foregoing, I hereby authorize the Releasees and grant unto them the unrestrained rights to utilize the Released Subject Matter in connection with the Appeal’s advertising, publicity, public displays, and exhibitions. I give unrestricted permission for images, and recordings of my child or dependent to be used in print, video, digital and internet media. I agree that these images and/or voice recordings may be used by for a variety of purposes and that these images may be used without further notification. I hereby stipulate that the Released Subject Matter is the property of the Producer to do with as it will.

I hereby waive to the fullest extent that I may lawfully do so, any causes of action in law or equity I may have or may hereafter acquire against the Releasees or any of them for libel, slander, invasion of privacy, copyright or trademark violation, right of publicity, or false light arising out of or in connection with the utilization by the Releasees or another of the Released Subject Matter.

It is my intention that the above mentioned consideration represents the sole compensation that I am entitled to receive in connection with any and all usages of the Released Subject Matter. I expressly stipulate that the Releasees may utilize the Released Subject Matter or not as they choose in their sole discretion without affecting the validity of this Release. This Release shall be governed by [state] law.

I hereby certify that I am over the age of eighteen, and that I have read, understood, and agreed to the foregoing.

Printed Name of Minor: _____ Age of Minor: _____

Signature of parent or legal guardian: _____

Printed name of parent or legal guardian: _____

Address: _____

City, State, Country, Zip: _____

Phone: _____ Email: _____ Date: _____

PLEASE NOTE: These sample forms are only a starting point. Be sure to consult your legal team, if you have one, or seek advice from a legal professional.

Appendix:

Sample Artist Release Form

A sample release form if you're using outside photographers or artists.

ARTIST RELEASE FORM

This will confirm that for valuable consideration, receipt of which is hereby acknowledged, I have and hereby assign and transfer forever to [Organization], all of my rights, title and interest in and to the original art described below, including, without limitation, the copyright therein and/or the right to federally register the copyright therein, and any and all renewals and extensions of any such copyright, in the United States and every other country in the world. I authorize [Organization] to alter the work as needed.

I hereby warrant that I am the sole owner of said art, it is my original work, that it has never been published, and that I have no contractual or other arrangements which would interfere with or prevent the above-mentioned assignment or transfer of all my right, title and interest in said material. I represent that the individual named below is the sole artist to the aforesaid original work which I have furnished hereunder.

I understand that I will retain the right to use the aforementioned work for self promotion purposes upon approval by [Organization].

I also agree to indemnify and hold harmless [Organization], and their respective directors, officers, agents and employees and assigns, against and from any and all claims, liability, loss and damage, including reasonable attorney's fees, caused by or arising wholly or in part, directly out of my inability to prove the validity of what is stated above (in paragraphs 1 and 2), and to defend at my expense any litigation instituted by others against any of them resulting therefrom.

Name of the Piece: _____

Artist Name: _____

Signature: _____ Date: _____

Address: _____ Phone: _____

City: _____ State: _____ Zip: _____

PLEASE NOTE: *This sample release form is only a starting point. Be sure to consult your legal team, if you have one, or seek advice from a legal professional.*