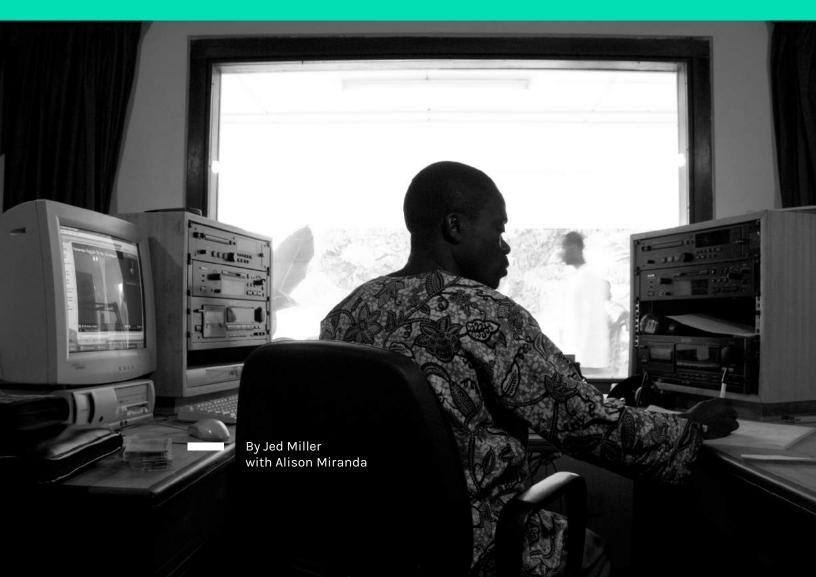# The Story Behind the Story:

Obstacles and Promising Techniques in Storytelling for Transparency and Accountability

By Jed Miller
with Alison Miranda

This paper has been prepared for the Transparency and Accountability Initiative.

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Report designed by Zak Bickel. Images from the World Bank.
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Executive Summary

In the social sector, the term "storytelling" is applied to a diffuse range of activities. Donors and practitioners in the transparency, accountability, and participation community rely on stories to advocate our civic mission, to document and promote our work, and, often, to examine our own impact.

As a donor collaborative, the Transparency and Accountability Initiative (TAI) seeks to explore effective frameworks and tools in the field. These include tools not only for governance but also for the advocacy, grantmaking, and collaboration that undergird policy reform.

All of TAI's member donors struggle to convey impact. Compelling stories are a prized tool, but compelling results can be slow to surface and murky in their evidentiary value. If we could collect more vivid and accessible stories, we could better harness the imaginations of decision makers, the public, advocates, and grantmakers.

We've spoken with more than two dozen people from the transparency, accountability, communications, and storytelling fields. We heard about several efforts underway by TAI members, peers, and grantees to find and present results more effectively and to better connect communications, learning, and the reporting of project outcomes.

While donors' expanded efforts in learning and grantmaking support are not primarily efforts to improve storytelling, they provide an opportunity to review outcomes more quickly, and a better pipeline for identifying, gathering, and using stories.

The conclusions and interpretation in this report are the author's alone.

Our exploration revealed that storytelling faces challenges of content, capacity, and culture:

- Information alone is not a story.

- Some results are not stories, and vice versa.

- Storytelling and communications skills are often scarce.

- Power dynamics make it hard to report project difficulties.

- Functional silos in the grantmaking process create barriers to reflection, learning, and effective storytelling.

We found that the best methods for storytelling begin before projects produce outcomes and are driven by audience and purpose, and that these methods improve the capacity of the storytellers, as well as quality of the stories. Along with storytelling, it is the greater process of "story-making" that needs improvement.

If story-making is grounded in early planning, local capacity, tolerance for failure, and opportunities for reflection, grantees and donors will be better positioned to build more sustainable storytelling capacity, and to create a pipeline for more vivid, shareable stories.

We conclude by recommending several ways that TAI donors, their peers, and TAI can improve our stories and the story-making process, with suggested approaches including:

- Designating staff roles with dedicated responsibility for cultivating effective stories can transform the output of a project or program, and also install a champion of new story practices for the entire organization.

- Compiling the many existing templates for story creation—and for story collection—and testing effectiveness can help the field reduce duplicated efforts and accelerate learning and adaptation.

- Mapping the full process of story development can help groups to visualize barriers to workflow and story quality, and can design better story practices.

- Developing frameworks that match common story challenges with tools and approaches can add storytelling capacity to small and large organizations.

- Promoting approaches that consider power dynamics and organizational habits can help lower the barriers to candid discussion, between grantees and donors, between donors, and even inside organizations.

- Aligning work to improve stories more closely with ongoing research into transparency and accountability can deepen donors' understanding of how stories serve as tools—while also increasing collaboration between storytelling experts and academics.

- Breaking down the divisions between core grantmaking functions and traditional storytelling functions—at donor and grantee organizations—can liberate knowledge from functional silos such as communications, policy advocacy, and evaluation.

As most of TAI's member donors embark on new knowledge management and learning initiatives, a review of successful storytelling practices and shared challenges is a moment of opportunity, both to create more influential stories and to deploy stories and the story-making process as more regular, impactful tools for learning inside and between organizations.

It's kind of criminal and crazy how bad the social change sector is at telling stories about itself.

— Eli Pariser, co-founder, Upworthy

I. Introduction

To nail down a good story, a journalist is taught to begin with the "Five Ws": Who? What? Where? When? And why? If you can find the right subject, action, setting, and context, your reporting will result in a vivid story.

In the world of donor-funded, multiyear interventions into intractable social problems, the storyteller also must face the more complicated question: "How?" How can the complex relationships among governments, citizens, internationally supported nongovernmental organizations (NGO) programs, and local communities be documented and reconciled in stories that are accurate enough to be credible and vivid enough to be memorable and persuasive?

The Five Ws are no less important in storytelling for policy advocacy, of course, but because advocacy projects have drawn-out timelines, because the actors and the donors are usually oceans apart, and because the conflicts often resist media-friendly summaries, donors looking for distillable narratives for their work need more advanced methods and better tools than a reporter's notebook or an eyewitness's phone camera.

Whether stories are sought for advocacy communications or for evaluation and learning, our research suggests that the most promising solutions involve not only better techniques, but also better processes at the various stages of grantmaking, implementation, and communication.

The donors that constitute the Transparency and Accountability Initiative (TAI) share several explicit and implicit difficulties in creating results stories and making those stories accessible. The material generated by transparency projects is often wonky. The most compelling results can be slow to surface and murky in their evidentiary value. The capacity of grantees and other storytelling resources at the local level is often limited. Donor capacity can itself be limited by available time, organizational silos, and the tendency of policy professionals and researchers to think and write like academics, not narrators.

While TAI's donors and their various partners have embraced the value of stories to capture, convey, and promote the impact of transparency and accountability work, the community lacks a clear vision for considering the role of stories—how to find them or how to use them. With support from TAI, we sought to articulate this challenge and recommend potential solutions for further investigation. Our inquiry was driven by the following questions:

- For transparency and accountability donors and their grantees, what are the needs and the most important uses for stories?

- What makes a story valuable and valid?

- How can stories be communicated to foster capacity development and avoid loss of sector knowledge for both donors and grantees?

- How can donors create the right incentives for grantees to generate stories and to ensure they are accessible and authentic?

- How can stories be made more accessible for donor collaboration, not only between donors but also within donor organizations?

We interviewed more than two dozen people about their efforts to create results stories in the transparency and accountability field, including donor officers and managers inside and outside of TAI, NGO practitioners familiar and unfamiliar with TAI, and storytelling experts and consultants from a range of fields.

The answers we heard offered several effective techniques and brought forth a number of shared challenges to finding stories, to telling stories, and to creating

the conditions that allow for story development. Our findings surface methods for distilling story content from policy initiatives; advice on embracing the distinctions between progress, success, and impact; approaches to capacity development; interventions that help bad news travel "upward" more easily; and thoughtful accounts of how organizational culture inhibits effective storytelling.

Among these various methods to improve the flow of results stories from program activities to donor materials to public-facing media, the potential value of grant reports as a source for story material was also mentioned several times.

Whether stories are sought for advocacy communications or for evaluation and learning, our research suggests that the most promising solutions involve not only better techniques, but also better processes at the various stages of grant-making, implementation, and communication.

This investigation into the use of stories was conducted by TAI consultant Jed Miller, with TAI senior learning officer Alison Miranda. Jed is a communications strategist and writer whose work focuses on organizational development, digital tools, and the role of technology in transparency and governance reform. The discussions that led to this exploration began with questions about the impact of so-called impact stories and the effectiveness of the transparency and accountability sector in generating and learning from such stories.

Our findings and recommendations are intended to help TAI donors and grantees explore new ways to collect stories from their work and disseminate them, and to use good story practices for faster, richer cycles of learning in grantmaking and program design. Based on the range of interviews and the common themes in those discussions, we believe that organizations well beyond the TAI community and the governance sector will also benefit from these findings.

Every funder wants a different spin from a grantee's work. So grantees are forced into box-ticking, and need to respond to multiple templates.

– funder representative

To make stories "presentable" takes reality away.

– grantee organization representative

II. Findings: Common Challenges and Approaches

The uses of story varied across the groups we interviewed, as did the exact meaning of the term "story" in different uses, but we heard several common needs and challenges, and a number of approaches to finding, developing, and sharing stories.

By pointing out the different uses of story, we can reveal how the expectations and challenges vary as widely as the uses themselves. By cataloguing the challenges to story development and the approaches some groups found effective, we can promote knowledge-sharing among transparency and accountability projects, and suggest ways that TAI and its members can expand that sharing.

Uses for Results and Stories

While our colleagues' understanding of what constitutes a story differs across organizations, roles, and methodologies, the groups we spoke to reported a range of activities that rely on the content, inspiration, and insight provided by stories.

We did not aim to compile a library of use cases for story, but our findings show that when donors and grantees are clearer about the intended audiences and uses of story material, the most effective story-making techniques become clearer in turn. The selected uses on the right offer a starting point as readers consider how to develop more purpose-driven stories:

Advocating policy and social change

- Decision-maker influence
- Policy and issue advocacy
- Narrative as civic action
- Field-building and sector advocacy

Illustrating value and impact (public relations)

- Demonstrate organizational values and practices
- Promote and celebrate successes
- Reinforce peer organizations and sector support for an issue
- Revive interest in an issue
- Persuade specific audiences and communities of practice

Evaluating, learning, and adapting

- Reflection on projects or initiatives
- Cycles of failure, adaptation, and learning
- Cycles of learning for program and grant design
- Evidence
- Illumination or support of findings or results

This inquiry and our conversations with donors, grantees, and story experts all shared the assumption that transparency, accountability, and governance work is difficult to explain, in part because vivid, illustrative, real-world stories are hard to find. Glaring problems and hypothetical solutions provide built-in narratives, almost by definition. But the quest for stories of real-world solutions and their demonstrable impacts is longer and too often disappointing.

The types of challenges to story development, and the common complaints across those types, also reveal how many story challenges are systemic, cultural, and process-related, and not simply challenges of content quality or determining causation. While there has been a proliferation of methods to improve storytelling itself, the challenges of process and culture have gotten less attention. This briefing seeks to reveal commonalities among those "extra-editorial" challenges and to suggest approaches to addressing them, along with approaches for improving story content and storytelling techniques.

1. Content Challenges

The transparency and accountability sector has a permanent challenge distilling complex social problems and policy solutions into straightforward narratives. Most people don't care how the Third Little Pig chose his brick vendor or whether stronger local transparency would have tightened controls on construction materials, but such policy details are the building blocks of transparency stories.

Presenting governance reforms, policy advocacy, or transparency research in compelling ways requires particular time and skill, given that the dramatis personae are often systems, not individuals, and that the most meaningful changes often happen slowly.

We all seek ways to make policy the cornerstone of narratives that are not just memorable but also accurate, and that direct attention toward changes that make a difference. Too often, though, "you either get over-the-top emotional stories about change but don't learn how it happened," one interviewee told us, "or you get the white paper that nobody ever reads."

Interviewees complained about a shortage of material ("content") that is easy to use for good stories. The most common solutions are longstanding fundamentals of communications: extracting emblematic details from a complex narrative, boosting the signal of data with visualization, and packaging dry facts in media-rich formats.

The majority of the groups we spoke to work at the intersection of advocacy and policy, where the subject matter can be a law, an oil field, or a chemical compound. Issues like these rarely offer a traditional hero or story arc. To quote the Narrative Initiative's 2017 "Toward New Gravity" launch report, "Narratives are messy."

Donor interviewees agreed that policy advocacy often lacks the drama or pace of activist battles. Two program officers used the counter-example of a Global Witness campaign, where the conflict may have a "faster, more discernible outcome life cycle" that lends itself better to good stories. The fight between Global Witness and billionaire Beny Steinmetz, for instance, has included milestones such as arrests and the loss of a multimillion dollar mining deal.

Meanwhile, said the program officers, a program aimed at improving public services in Africa has "made a big difference in [citizen] mobilization but has yet to deliver a capping result." They noted that colleagues in a different department had featured the same local project in a donor story focused on equal justice, but that the transparency and governance angle is harder to convert to vivid storytelling, even when governance issues such as budgeting and service delivery directly inform both the problem and the envisioned solutions.

Our findings show that when donors and grantees are clearer about the intended audiences and uses of story material, the most effective story-making techniques become clearer in turn.

Elements: What We Mean When We Say "Story"

The field of storytelling for social change has surged with experts, agencies, and new approaches in the last decade, and many NGOs and donors are adding storytelling efforts to their communications work. Our inquiry into uses of story does not provide a comprehensive analysis of methodologies but does uncover common attributes of "good stories" for policy advocacy, based on conversations with practitioner groups such as StoryCorps and Upworthy; experts and coaches from the film, digital, academic, and journalism communities; and staff of and consultants to large and small NGOs and foundations; as well as our combined experience in communications, storytelling, and adaptive learning.

A good story …

- **is about people, not processes.** It has a protagonist whose life is subject to change for the better or the worse. The hero may be a person or a group, but their story "engages with people emotionally, not just rationally," as one member donor put it. A good story favors human narrative over academic exposition.

- **has a conflict** and is, in the words of story coach Jay Golden, "a journey with a twist." Another story expert said, "If there's no 'versus,' there's no story. If a story doesn't have conflict, it's just a report."

- **is vivid.** All too often, said one advocacy leader, "you get the white paper that nobody ever reads." A journalist and foundation consultant said, "We're so inundated with words all the time, it's hard to break through all the cliché and the regurgitated info."

- **is recognizable**—not just relatable—because it reflects events as they actually occurred. Grant recipients often "will leave out the difficulties" when they describe program outcomes, one civil society colleague told us. Another civil society colleague summarized the challenge even more starkly, saying, "To make stories 'presentable' takes reality away."

- **is retellable.** A good story, no matter its form, can move easily among individuals and across media, from a white paper to Facebook to the press. The power of a retellable story is especially important because, as one program officer noted, valuable findings and approaches are often exchanged in informal conversations among sector leaders, or between leaders and other groups. A good story is "influencer friendly."

To pinpoint, translate, and create stories from the "messy" activity of policy advocacy, grantees and donors are cultivating techniques that shape their work, defining the problems that demand intervention, bringing the individuals and programs taking action into the spotlight as leading characters, and continually seeking vivid outcomes and, hopefully, victories.

It's about being intentional and thinking ahead of time, not just, "Oh, we need stories, here's an interesting one."

We heard donors and practitioners mention several methods for distilling policy and advocacy content into compelling stories:

- Though blogs may be an aging "2.0" technology, one grantee said their organization reports its work almost entirely "in blogs, short videos, and social posts. ... We do not have a specific communications department. We write from our own personal perspectives." Each staff member writes about their own project, and the organization has "a strong focus on qualitative stories, qualitative narratives." To account for any "potential bias toward success," they said, "an internal question we ask ourselves is, 'Is this something I would like to report, or is it actually happening?'"

- When Global Witness broadened its investigations into corruption and fiscal flows, it cultivated data journalism skills to supplement its longstanding investigative experience. The organization did this first by seeking new collaborators like Open Knowledge and School of Data, but the usage and uptake of the resulting data-driven stories were so dramatic that Global Witness moved rapidly to new models of storytelling and new staff to support it.

- To help identify potential story elements within chaotic program activities and shape them into more relatable, purposeful story material, some organizations use tools such as Journey Curve from Retellable, the Horticulture framework from Active Voice Lab, or the Hatch for Good platform created by the Rockefeller Foundation.

- As Natural Resource Governance Institute (NRGI) expanded its anti-corruption portfolio, 150 case studies were commissioned and then distilled into a new database, organizing and coding the

research to allow easier access. From these case studies, NRGI created short narratives—"writing it in a way that was easier to understand than a large Excel spreadsheet"—and even shorter "four-sentence summaries," to make the database even easier to scan. NRGI's governance team now uses the repository regularly to find stories and conduct new research (though other NRGI teams have not engaged with the repository at the same level). The repository was the primary resource for a further, public-facing, distillation: the <u>"Red Flags" report</u> on corruption risks.

- The <u>"Extract-a-Fact"</u> blog by Publish What You Pay–US (PWYP) is another simple model for creating stories of impact—as well as promoting impact through stories. Only a few PWYP coalition members have governance expertise, data skills, local knowledge, and editorial capacity all in one place. "Extract-a-Fact" serves as an in-house magazine for the PWYP community, developing and cross-posting stories from the global network of extractives transparency groups, and doing it with sector knowledge that no editor or data journalist on contract could offer.

- One donor reported how an international development organization shortened the time between project activity and storytelling by using a blog to "layer" their traditional reporting with more timely commentary. "We would continue to do that on a regular basis," they said, "so that we would already have documentation from key moments."

Another donor drew the useful distinction between storytelling by habit and "storytelling for purpose." They said, "It's about being intentional and thinking ahead of time, not just, 'Oh, we need stories, here's an interesting one.'"

This reminder about storytelling as a robust practice, not an afterthought, was a theme in many of our conversations. The techniques cited as most effective by interviewees were not innovative tools for converting raw outputs into compelling anecdotes. They were methods to build story planning, create a greater awareness of content, and process challenges more fully into programming.

In policy advocacy, the meaning of the word "result" or "impact" is varied and not always defined. Some project results fall somewhere between outputs and outcomes, and some results that fall short of being impacts may still be significantly informative to the field.

"Everybody needs results stories," one donor said, but it's difficult to be accurate because the search for stories "often comes at the end of the process." A related concern common among donors and grantees was that outcomes don't always obey the traditional grant cycle, and late-arriving results are not only harder to document, but less likely to inform near-term grantmaking decisions.

Outcomes can be messy and hard to discern or distill into discrete stories. "To make stories 'presentable' takes reality away," as one grantee said. The stories may be "packaged and neat," the above donor said, "but they often belie what people are hoping to get out of them. There's a total divide between large claims and hard results."

The experts at StoryCorps, pioneers in oral history and audio storytelling, insist that no "focused outputs" are included in their grant proposals to capture stories from issue-based projects. "If the results are prescribed," they said, "it becomes a very awkward conversation, one in which there's not that much of an original story."

A donor researcher described a massive organizational review of evaluations that showed how evaluation language "killed every sense of what's going on by putting it into a box," with text that was "so analytical that it lost the voice." They said evaluation approaches "become so formulaic—due to coding and categorization"—that each project narrative sounds like the next, "and that makes for a terribly boring read."

At a meeting we held with Bay Area grantmakers and other practitioners, one funder acknowledged an "imprisonment of systems" for grantees as they report, and for donors, who then seek outcomes and insights from those materials. "Every funder wants a different spin from a grantee's work," they said. "So grantees are forced into box-ticking, and need to respond to multiple

> We need to continue to define not just types of stories but the type of outcomes and findings that offer some of the same utility as stories.

templates." Worst of all, they added, the stories that are required in such reporting processes don't always get read. We heard this point in multiple conversations: the frustration that potential story material is collected for a specific use or at a specific time, but does not find its way onto the desks of others who could have used it had it been collected sooner or in a different way.

A non-TAI donor executive said they prefer to divorce results collection from storytelling altogether, because they found the story needs of their own public relations team to be too different from their own monitoring and evaluation process to be mutually useful. This take on the divergence between story and evidence was starker than the other views we heard, but the distinction between impactful results and memorable narratives was a challenge reported by most respondents.

Several groups have been seeking frameworks that expand the definitions of "story" and "results" to help them observe outcomes outside the narrow range of "home runs" that are clearly attributable to a specific program.

Similarly, failures or unanticipated obstacles can offer valuable insights. The complicated incentives surrounding failure are discussed further below, but several interviewees said that by explicitly seeking different types of stories, groups can improve their chances of capturing a wider range of outcomes and insights.

We need to continue to define not just types of stories but the types of outcomes and findings that offer some of the same utility as stories in the traditional sense.

We heard about several methods that donors and practitioners are using to deepen understanding about types of stories and the nature and value of results:

- An interviewee from an international agency said they evaluate some programs using the Most Significant Change technique, in which a simple, open-ended question is used to gather firsthand accounts. They noted the scalability of the approach—as it requires less expertise and relatively few resources—and also pointed out the value

of using an open-ended question to collect answers that are less polished, less circumscribed, and more reflective of real-life events, regardless of whether a project unfolded as anticipated.

- An expert in NGO and grants data said that donors might consider using existing grant processes—like applications and reporting forms—to seek a wider range of outcomes and outputs from grant recipients. "What if," they asked, "we create containers for all the story types?" This could help organizations use stories to define a spectrum of outcomes beyond the dichotomy of success and failure, thus helping to reshape the culture of results.

- One TAI donor compiled models of story "types" and proposed templates to help translate material from drier "count-focused" grant tracking into more engaging narratives that are suited to particular subjects and contexts. They also explored a minimum definition of story itself: "narrative, novel, time-bound, rigorously researched, and full of details and facts."

Taken together, such tools offer the prospect of a story "system" that can capture a wider range of outcomes than simplistic "wins," while also bolstering the capacity of teams to shape raw material into more relatable, retellable packages.

It is worth adding, though, that strong frameworks do not themselves create good material. The drafter of the sample templates above emphasized that stories about policy benefits or local impacts require the presence of a direct beneficiary, or knowledge and insight into the local region. Fantasy or mystery, legal thriller or political drama, the story still needs a determined heroine or a shady landowner (or an even shadier corporation lurking behind the landowner).

As Fung, Gilman, and Shkabatur (2010) said about technology in TAI's "Impact Case Studies for Middle Income and Developing Countries," although "big bang" results stories are "perhaps perceived as the dominant paradigm, we believe that the number of actual and potential interventions of this kind is exceedingly rare. Many other necessary conditions must be in place for a technological intervention to truly be the last piece of a jigsaw puzzle." Put in 2017 terms, we can't all be ProZorro.[1]

Whether the outputs and outcomes of a project fit a classic victory narrative, a more process-centric narrative, or no narrative at all, the work of finding and fitting the material to purpose and audience requires time, capacity, and consideration that are not always available.

[1.] The Ukrainian contract transparency tool ProZorro has been widely—and rightly—heralded for its rise from a volunteer-run project to a government platform and for its tangible results securing public savings and increasing access to procurement information.

Whether the outputs and outcomes of a project fit a classic victory narrative, a more process-centric narrative, or no narrative at all, the work of finding and fitting the material to purpose and audience requires time, capacity, and consideration that are not always available. The next sections discuss those barriers and some potential solutions.

2. Capacity Challenges

Many of the content challenges point naturally to capacity needs. Along with the need to find "story friendly" substance in progress or outcomes, the other most commonly reported limitation on developing results stories is the lack of local resources and skills for gathering story material as the events unfold.

Documentation and communication require tools, training, and expertise. But many grantees receive support because of their expertise in governance, transparency, and citizen participation, not because they have a well-equipped communications team or a proven record as storytellers. Nor are donor teams exempt from capacity challenges: Often, the program officers hired to steer funding are similarly hired based on professional and subject-matter knowledge, not for expertise in storytelling or public advocacy.

The simplest example of this capacity gap is a grantee organization that does not have a staffer whose full-time assignment is communications, much less a dedicated communications team. In many small and medium-sized organizations, the staff member with communications responsibilities is also the person charged with community outreach, grant writing, or digital work.

While we could argue that some activities, such as citizen engagement or public advocacy, demand communications skills that translate seamlessly to external communications or storytelling, nearly everyone we spoke to cited limited capacity for communications and storytelling as a significant challenge for grantees—and, in some cases, for donors. "There's a tendency to try to cram storytelling into some existing position," said one storytelling expert with foundation experience. "If donors want story, they have to pay for it."

"We've wanted to prioritize all these amazing stories, … but at the end of the day, the IRS needs me to fill out a tax form at a certain time."

One grantee founder with only a skeletal staff told us that their administrative needs almost invariably come before any work distilling, editing, or producing shareable stories. "We've wanted to prioritize all these amazing stories," they said, "but at the end of the day, the IRS needs me to fill out a tax form at a certain time. Nobody is forcing me to fill out a story form at a certain time."

A donor interviewee recalled challenges from previous work at an international aid agency where good story material was available in evaluation documents, but "to look at a batch of evaluations and tease out common questions is an intensive internal process."

Recognizing that many of their grantees have capacity gaps in communications (as well as in financial management, human resources, and technology), some TAI member donors have devoted resources to providing surrogate capacity, in the form of outside contractors, remote support, or training. But a significant number of donors and grantees recognized that donor-delivered consulting is limited, if not wasteful. They warned of consulting "at" grantees instead of "with" them.

"When the grantee is in charge of shaping the consultancy—including the issue, consultant, and timing—the results tend to be better than if the donor makes

the decisions," said one program officer. Another interviewee corroborated this observation, recounting how a donor effort to deliver communications consulting in Latin America received limited interest or engagement from the grantees themselves. Such exogenous support, we were told, should be driven by local demand.

This call for alignment between third-party support and grantee-stated needs was echoed during TAI's winter 2017 learning session in New York. "If you're going to send an expert in collecting stories," one grantee said, "make sure to send someone with the experience to think like a journalist, not just an evaluator."

Another event participant said simply, "The closer you are to the community, the more you encounter the story culture," that is, the stream of existing, authentic conversation among the people nearest the work.

An interviewee who is a founder in the environmental policy arena was even more blunt: "Donors tell success stories that tend to help the donor look successful," they said, "even when the success was a grantee's success. It would be great if donor storytelling focused more on helping grantees to sustain their own work for the future."

Amid a broad consensus about the challenges of capacity building, we heard about several approaches that disseminate story-related skills but emphasize delivering sustainable capacity:

- Active Voice Lab recommended their collaborators at the Sundance Institute's Stories of Change project, a Skoll-supported effort to link storytellers and activists in continuing "intentional" conversations about impact. While this model calls for outside resources unavailable to many campaigns, the principle of early stage collaboration between story experts and local advocates is one that many interviewees raised as a best-case scenario.

- The Center for Story-Based Strategy (CSS) trains individuals and further supports them and their organizations with post-training guidance on integrating better story approaches. CSS was founded to address asymmetries of power and capacity in the social sector,

Capacity development should favor structural approaches and adaptive learning over one-off projects or trainings.

and in storytelling in particular, by bringing society's "most vulnerable people" to the center of stories and, wherever possible, bringing those same people to the front to tell their own stories.

- With their Mapeo project, Digital Democracy has turned map-making into an opportunity for rural and indigenous communities to tell their own stories. "Our work has always aspired to be decolonializing," they said. "We want to allow our partners to be more self-sufficient and autonomous." Among the innovations that make Mapeo a platform for greater autonomy are its peer-to-peer database—which allows rural communities to make digital maps together, even without regular internet access—and a customization feature that each community can use to co-design icons that represent their villages and lands.

- Retellable works with organizations and social entrepreneurs to draw out each group's "defining stories" and recommends designating a "storykeeper" within each organization, who serves as a curator for stories that convey core values and a steward for the processes that create and spread them. Though the title and implied scope of a "storykeeper" are not common practice, we have observed some groups establishing similar resources, such as the program-centric communications staff at Global Witness or The William and Flora Hewlett Foundation.

Ironically, our inquiry into the concept of storykeepers prompted reflection about where that function resides within TAI itself. "I had not thought of my senior learning officer role as a 'storykeeper' role," said Alison Miranda. "I've seen our work to monitor our progress, document evidence of results, and capture learning insights as distinct from storykeeping or story-making. But I can see how all of these pieces can surface rich story content."

Among storytelling experts, donors, and grantees, one point of consensus was the recommendation that capacity development should favor structural approaches and adaptive learning over one-off projects or trainings. As The Narrative Initiative notes, "narrative-focused communications specialists ... are engaging social change organizations in an effort to embed a media power

analysis, messaging and communications strategies on the front-end of campaigns and goals, in concert with the deployment of other tactics like arts and culture engagement to achieve longer-term impact."

3. Culture Challenges

The buzzword "storytelling" is comfortably applied to a diffuse range of NGO activities—from the elevation of shareable video, to a focus on personal narratives in annual reports, to experiments in data journalism. A growing number of organizations have sought to foster a "storytelling culture" that produces better stories more regularly. And a proliferation of consultants and agencies have arisen offering to meet that need.

It is useful to point out that "storytelling" has become NGO jargon—not because we should question the value of the central idea or embark on a semantic odyssey, but because the broad term (like "transparency" or "accountability" or "digital") blends together different practical needs and activities.

To strengthen a culture of storytelling in practical terms, organizations must face their operational and behavioral habits, and their capacity to learn and adapt. A transformation in our sector's culture of storytelling will require that we assess and address the grantmaking culture barriers to the effective use of stories. As we recommend steps toward that goal, we need to distinguish the activities that support a storytelling culture—and learn what strengthens and hinders those activities.

Interviewees complained of a resistance to documenting—or acknowledging—failures among donors and grantees alike. Donors spoke in clear-eyed terms about the financial and political power imbalances that often inhibit unvarnished reports from grantees. Grantee groups were similarly up front about the lack of candor that can shadow civil society's communication with donors.

Reporting partial results or nonsuccess is not easy and not as common as it should be. There is "insecurity," said one grantee, "fear that if we report failure then donors will discontinue their funding and find some other partner." Another said most grantees, "don't know how to communicate a failure without it looking like you're useless."

Colleagues from the donor and grantee sides cited powerful disincentives to revealing when projects veer off plan or meet insurmountable obstacles or serious delays. The ingrained resistance to reporting bad news upward was nearly universal.

Several people also were concerned about what they see as a donor bias toward the expectation of success. One grantee interviewee attributed these tensions in honest reporting to the physical and cultural distances between donors and grantees. When criteria—not only for success, but also for the range of possible outcomes—are set from outside the local project community, they said, it becomes much harder to get an accurate story of results. They compared the problem to constructing a building using out-of-town architects. Not only can the project design lack full awareness of local realities, but the grantee, like a local contractor at a building site, may need to "shift the priorities to make their own minimum" income.

The tendency of bad news to sink not surface isn't reserved to conversations between grantees and donors. Within NGO teams, program staff may underreport challenges out of another kind of insecurity: as one grantee put it, "the need to justify their paychecks." Even more significantly, several interviewees from the donor side reported structural disincentives to communicating internally about project challenges—such as an existential need to preserve program budget and a top-down appetite for results.

"Failing is not necessarily a bad thing as long as there are learnings along the way, chances to take that experience on board and adapt."

One TAI donor said that "tolerance for failure" is insufficient among grantmakers. They called it an "openness challenge," a practical risk that grantee candor increases donor hesitancy to renew funding.

The same principle was cited in several other interviews. Grantees warned that when international donors or visiting consultants collect stories, the lack of local context weakened not only the quality of the resulting information but also the basic honesty of respondents. Inevitably, one said, "some successes reported are not sufficiently reflective of reality."

Like storytelling more generally, stories of failure may go unreported in part due to lack of time. "We have so many stories of things failing," one story trainer said, "but we don't yet have staff capacity to package these stories to share. Failing is not necessarily a bad thing as long as there are learnings along the way, chances to take that experience on board and adapt." This is a useful story in itself, as it points to how capacity and complicated incentives can combine to inhibit learning, even when the readiness to report failure exists.

Another storytelling expert said that "summative evaluation is really geared toward telling the organization what it wants to hear. The people brought into interviews and focus groups know what answers they're supposed to give." This particular reflection indicates the potential for bias in evaluation. But both evaluation and storytelling processes must anticipate and mitigate bias whenever possible, and organizations do not always overcome this challenge.

Despite the common theme that failure is hard to report, some grantees have found that the decision to be candid about project difficulties can pay off. "I was honest about our mixed successes in grant reports," said one, "and I got a lot of positive responses." They speculated that those reports were better received because they included suggestions for how the project could be adjusted in response to the challenges encountered.

Another described how, "three months into a project, we found what we had designed was no longer relevant. We raised it with the funder, and leaders sat down with us to discuss." The resulting meeting led to a midstream adaptation of the project. "They really appreciated it," the grantee added. "That was a positive surprise for us."

To strengthen a culture of storytelling in practical terms, organizations must face their operational and behavioral habits, and their capacity to learn and adapt.

- To create a more conducive dynamic for unvarnished truths and unexpected outcomes, StoryCorps emphasizes the power of peer-to-peer story collection. StoryCorps suggests that the person gathering the story come from the same location or perspective as the person telling the story. The shared context, they said, creates stories that are more authentic and thus more relatable, even to people from a different context.

- Reducing a bias toward certain (or any) results was one of the benefits cited by the donor who recommended the Most Significant Change method. The technique's simpler, open-ended question leaves less room for differences in background or power to influence the exchange, and leaves more room to learn about "unexpected or negative outcomes." While the respondents may still be subjective in how they report any changes, the resulting information is grounded in firsthand experience and thus enters the story pipeline freer from the interpretation of evaluators or other third parties.

- An NGO that partners with development organizations to report on their programs explained how its model improved when it expanded from documentary reporting to include more probing, complicated accounts from the field. Now, in addition to simply documenting local programs, student reporters regularly create a second report on "what they saw, their honest reflections, their vulnerable moments." The group's founder said that, in addition to fostering more responsible reporting skills, the more personal reporting provides "a more holistic, relatable picture of the relationships, communities, and impact" of the local programs.

- A researcher on environmental and movement narratives said that groups seeking more effective, authentic stories need to learn more about not only what questions to ask but also how they ask them. They drew a distinction between asking questions with curiosity and seeking simply to "extract" information.

- A program officer focused on learning suggested, "Perhaps we are not asking the right questions" of grantees. To open a wider transom for stories of failure and learning, donors may need to encourage more methodical thinking by grantees about possible outcomes and theories of change. "You have to provide some sort of analysis about why you think something didn't work," they said, "clarity about what you expected to happen. Perhaps some questions could be included in grantee reporting to clarify these assumptions. I am sure the information is there, but we are not eliciting this in an effective way."

Despite the earlier anecdotes from grantees who took the initiative and informed donors about project challenges, our interviews did not include any suggestions about how to foster (or even normalize) bottom-up reporting about challenges or failures. However, the need for a more open invitation to report a wider array of outcomes was a common theme. It is worth considering that stories of learning, and of failure, can be both a tool to encourage candor from the bottom up and also the result of such an inquiry. Our recommendations include suggestions about how to cultivate grantee-led cycles of challenge, learning, and adaptation.

CULTURE: THE TIMING, HABITS, AND PARTITIONED FUNCTIONS OF GRANTMAKING CAN CREATE BARRIERS TO REFLECTION AND LEARNING.

At donor institutions, sometimes the barriers to facing failure and then adapting are more structural than social. Several program officers said the grantmaking cycle offers few opportunities for deep review of grant outcomes or stories from the ground level. Grant reviews tend to be about "how the money was spent, what they undertook," said one officer, with less time available for "what was learned and what it meant." This can be a particular challenge when "we often have decisions to make renewals in advance of the final report"—a sentiment expressed by one program officer and shared by several.

A commonly reported challenge for donors was the—perhaps inevitable—division of labor over program implementation, evaluation, and documentation.

"If a story doesn't have conflict, it's just a report."

Stories, results, and results stories are tools used in multiple functions in the grantmaking and advocacy life cycle, and this diversity of needs is reflected in how organizations seek stories and results. Academics, public relations officers, activists, and community workers all have divergent styles of writing and persuasion, so material generated by one group may or may not be a compelling story or demonstrable impact, or usable at all, for another group.

So in addition to the challenge of maintaining "fidelity" in stories imported from distant organizations with lower capacity and complicated incentives, donors face the challenge of locating potential sources of stories—of knowledge itself—across their own programs.

Just as many of us have seen with transparency initiatives (in national implementations of the Open Government Partnership, for instance) or with technology projects (such as School of Data or the Greenpeace Mobilisation Lab), the success of any new approach often depends not on the approach itself but on existing structures, habits, and agents of change.

The grantmaking cycle is often more transactional than analytical. It "tends to collapse accountability and learning into one moment," in the words of one donor. So even if grant reports or informal exchanges include nuance or bad news, the substance of that information is easily lost in the standard cycle of proposal, grant, reporting, and final review. This logistical reality further reduces the incentive for program officers and grantees to leverage the reporting process for storytelling.

The donors we spoke to said fragmentation of knowledge—across functions and long time periods—was a pervasive problem: "We're all harvesting and we're all in the same field," said one, "but none of us can see one another." Several interviewees identified learning activities and better uses of story as valuable tools to inform and improve program strategies.

Every TAI member donor is currently working to prevent lost knowledge and learning by investing in new learning teams and adding new processes to their standard grantmaking workflows. Donors can institutionalize reflection and adaptation in their own programs and grantmaking processes.

We heard about several efforts by donors to break down the cultural and operational barriers to finding stories for communication or for internal and peer learning:

- At the Ford Foundation, the new Office of Strategy and Learning is working to "socialize reflection and learning" within the foundation. Part of that socialization has been to shift evaluation and learning activities away from "burdensome internal reporting" to "structured, real-time conversations" between each program and the learning team. This new style of adaptive learning includes annual "reflection meetings" with program teams and deeper on-demand support to teams that request it.

  It's important to note that Ford's new approach to learning comes at the same time as its shift to general support grantmaking and an overhaul of the grant reporting process. A colleague at Ford said that, as new structures for learning become more widely used, they anticipate that new forms of grant reporting will feed more grantee stories—and grantee participants—into the internal learning process.

- A similar evolution in grant reporting and learning is underway at Open Society Foundations (OSF), where the new Grantmaking Support Unit has "reforms" in grant reporting among its top priorities. OSF seeks to capture "narratives about change" better in its grant reports, and improve on reporting that has "tended to be a litany of activities."

  Reports on grant outcomes often "come too late to be helpful" in learning and adaptation, they said. By updating the foundation's reporting approach, and by focusing more explicitly on stories, they hope OSF can use grant reports to "get at what we really want to know" about what was learned. Deep discussion of "What were you thinking when you began? What did you learn?" is "not something we've gotten traditionally … particularly not in written form."

> **The fragmentation of story work … is as much a symptom of bureaucratic and cultural silos as a reflection of the needs both to assess and communicate results.**

- Over the past five years, The William and Flora Hewlett Foundation has made communications and storytelling more central to its work, evolving from fifty years of "leading with the work," as one Hewlett staffer put it. As part of this shift, the foundation has embedded communications officers within each of its program areas. These are individuals "with substantive knowledge about the work," said the interviewee, "not just communications skills, but a deep understanding of the issues, who the grantees are, challenges in developing countries … knowledge that can support strategic communications decisions." This acknowledgment that story work is structural as well as creative aligns with the increase in staff data journalists at transparency NGOs such as Global Witness and the ONE Campaign, and the trend in hiring or designating organizational "storykeepers" mentioned by several interviewees.

  Story-driven approaches have also informed Hewlett's grantmaking process. To strengthen reporting and decision making between program officers and program boards, Hewlett's teams have cultivated storytelling skills for key internal meetings, "coaching around how to create some suspense, add personal discovery into the story," one teammate said. "Cerebral topics require you to bring people along with you about the value of the work."

The problem of duplicated efforts between donors or within single organizations is hardly news to anyone. The fragmentation of story work across multiple functions in the grantmaking cycle is as much a symptom of bureaucratic and cultural silos as a reflection of the continuing needs both to assess and communicate results.

A commitment to better knowledge-sharing, adaptation, and effectiveness is one of the steering principles behind the TAI. Our recommendations include steps that donors and grantees can take to increase the power and value of stories by establishing better practices of knowledge-sharing and story development throughout the life cycle of a project.

Perhaps we are not
asking the right questions.

– funder representative
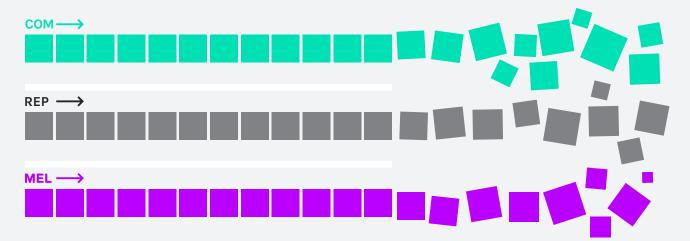
III. Conclusions and Reflections

There's no universal or unifying method for storytelling in transparency and accountability programs—no framework that binds many techniques into a single method to distill and convey impact. Indeed, the quest for reliable techniques of story collection and formats for dissemination will meet only partial success if it focuses on all-purpose products.

Without a context-driven approach that tailors story methods to project realities, results stories for transparency and accountability will be costlier to capture and less authentic in their content. Even with an up-to-date toolkit of collection, production, and dissemination techniques, the supply of better results stories will be limited unless donors continue to upgrade internal processes of grantmaking design and collaboration across functions. These process and structural decisions—such as Ford's work to increase "learning and reflection meetings," Hewlett's in-house communications expertise embedded in the grantmaking and programmatic work, OSF's moves toward adaptive learning in grantmaking support, or Omidyar Network's diversification of what stories to seek—create a conducive, enabling environment for identifying and capturing results stories.

In turn, the success of these and other process adjustments will depend on the successful collection of outcomes and stories on the ground. And as our recommendations suggest, some of the most promising methods for gathering stories involve broadening the types of stories we seek and the range of outcomes we consider useful, informative, and story-friendly.
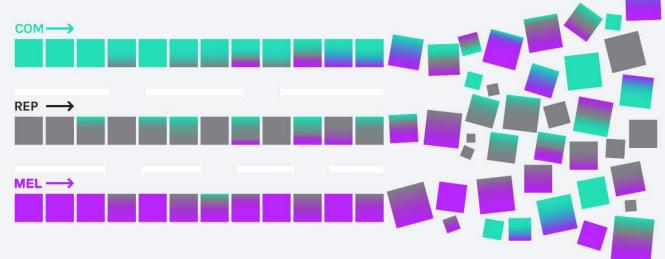
To build a more sustainable pipeline for stories, we need to create more conducive conditions for story-making and to foster the practice of more effective and realistic techniques among donors and grantees alike. If the story techniques we use are more driven by listening—including to others within our own organizations—donors can encourage stories that are more responsible in their accuracy to the lived experience of grantees and the communities they serve. This stronger pipeline of timely, authentic, and retellable stories can inform programming and grant decisions; help to drive policy; add to sector knowledge; and inform adaptation by both donors and grantees.

Storytelling and Grantmaking

The usual story: In the parallel activities that support grantmaking, communications (COM), grant reporting (REP), and monitoring, evaluation, and learning (MEL) are traditionally isolated from each other due to geography, time, and organizational function.

COM ⟶

REP ⟶

MEL ⟶

A better ending: By establishing more communication between workflows, using stronger learning practices and design thinking built on the realities of capacity and culture, donors and grantees can foster better story development, more diverse and authentic stories, and faster cycles of adaptation.

COM ⟶

REP ⟶

MEL ⟶

4. Bright Spots and Addressing Challenges

Below are recommendations to help donors and grantees to strengthen their cultivation and purposeful use of story pipelines. While we distinguish some recommendations as more appropriate for donors, many can benefit both groups.

IMPROVING CONTENT AND CAPACITY

Making storytelling an explicit component of relevant staff roles and responsibilities – and ideally identifying a champion of new story practices for the entire organization – can transform the output of a project or program.

Even in the absence of additional staff, grantees and funders should use the tools already available (such as blogs and spreadsheets) to organize and maintain story content, coding, and thinking. Staff responsibilities for these tasks should be clearly established.

As examples to build on, consider the addition of issue-expert communications staff at the Hewlett Foundation and Global Witness; or the investment in data journalism by PWYP-US with its Extract-a-Fact blog or by the ONE Campaign, with its hiring of a full-time data scientist; or the use of an internal repository of case studies by NRGI; or the staff training model at the Center for Story-Based Strategy, which provides a cohort and follow-up support to trainees; or the creation of an organization-wide "storykeeper," to seek stories and remind teammates of their importance.

Compiling the many existing templates for story creation— and for story collection—can help the field reduce duplicated efforts; and testing different templates may accelerate learning and adaptation.

As examples to build on, consider the "Elements of Story" tool from the Center for Story-Based Strategy; or the "Journey Curve" model from Retellable; or, as a valuable counter-example, the warning from StoryCorps to avoid over-planned, "focused outputs" when seeking stories.

TAI and its member donors should consider a wider survey and compilation of story templates used not only by NGOs, but by the for-profit and academic sectors. Such a survey, while running the risk of becoming outdated, could help donors and grantees seeking more purpose-fit, design-driven uses of story. More than one interviewee expressed interest in such a compilation (and interest in TAI as a facilitator for relevant knowledge-sharing among donors as well as grantees).

Mapping the full process of story development can help groups visualize barriers to workflow and story quality, and to design better story practices.

For grantees, a map of the story process can help to allocate time and resources for documentation and reflection, and also to consider the needs of different actors and audiences when planning communications.

For donors, visualizing the flow of potential story content through the grant-making, implementation, reporting, and communications process can help to identify opportunities for information sharing, gaps in workflow, the incentives of different colleagues and grantees, and places to mitigate risks such as lost miscommunication or lost knowledge. Visualizing these elements—and comparing these process maps among donors—can also inform future research, pilots, and tools by TAI members and others.

Donors can also use their bird's-eye view to identify and develop cross-portfolio stories.

Developing frameworks that match common story challenges with tools and approaches can add storytelling capacity to small and large organizations.

As examples to build on, consider Active Voice Lab's Horticulture framework; or the Hatch for Good method originally developed at the Rockefeller Foundation; or the recent investigations by the Omidyar Network into the role of story templates in supporting particular types of stories.

Donors should also consider piloting new formats for grant reports—and grant applications—that account for a wider range of project outcomes and make explicit the requirement for stories. This was a recommendation we heard from donors, grantees, and other interviewees—as one TAI donor put it, "Perhaps we are not asking the right questions." Open Society Foundations have been investigating how to revise their grant reporting approach to improve learning, and potentially to yield more useful stories; GuideStar, an NGO tracking and analyzing foundation data, described early inquiries into this question; and The Tides Foundation, which oversees multiple grantmakers and grantees, expressed interest in grantmaking mechanisms that could better serve multiple reporting needs.

If, as one interviewee put it, we created "containers for *all* the story types," we could widen the overall pipeline of available stories about any single project, but more importantly, we could encourage both donors and grantees to go beyond the dichotomy of success and failure, and help to reshape the culture of results.

Donors should also remain mindful of their own capacity to set a different frame around terms like "results" and "learning," so that anticipated and unexpected outcomes are both presented as valuable.

Promoting approaches that consider power dynamics and organizational habits can help lower the barriers to candid discussion, between grantees and donors, between donors, and even inside organizations.

As examples to build on, consider the Most Significant Change evaluative approach to documenting progress and outcomes; or the principle of peer-to-peer story collection modeled by StoryCorps; or the use of serial, grantee-led blogging that captures reflections and project vicissitudes at different progress markers; or experiments in capacity development that foster "bottom-up" conversations between grantees and donors and opportunities for course-correction during projects.

If we can better understand each other's challenges (and inhibitions) to discussing negative or unintended outcomes, we could test and promote methods that transcend those obstacles and collect more valid, accurate, and informative stories.

As an information hub and convener, TAI can foster this sort of knowledge-sharing and help to build cohorts of support for story practices at the donor level and between donors and grantees. Topics to consider for further inquiry might include potential experiments with different ways to solicit stories; or changes to reporting frameworks or templates to be more "story-friendly;" or the prospects for more robust discussions of failure and how to make it easier for bad news to travel "upward," between grantees and donors and even within foundations.

Donors can also use their bird's-eye view to identify and develop cross-portfolio stories, relieving some of the burden that is placed on grantees to attribute larger meaning to their individual stories and results.

At donor institutions, sometimes the barriers to facing failure and then adapting are more structural than social.

Aligning efforts to improve the pipeline of results stories more closely with ongoing research into transparency and accountability can deepen donors' understanding of how stories serve as tools—while also increasing collaboration between storytelling experts and academics.

For example, consider a literature review exploring the effects of stories in transparency, accountability, and participation efforts, working with a group such as The Narrative Initiative or a researcher such as Jonathan Fox.

Breaking down the divisions between core grantmaking functions and traditional storytelling functions—at donor and grantee organizations—can liberate knowledge from functional silos such as communications, policy advocacy, and evaluation.

Our findings demonstrate an appetite among both donors and grantees for fuller and earlier consultation between these separate activities. By incorporating story thinking earlier in the grantmaking cycle, we can link story processes and donor learning and improve the pipeline, quality, and depth of the stories we produce.

As examples to build on, consider the Skoll/Sundance Institute collaboration, "Stories of Change" project, which pairs storytellers and activists early in the project cycle; or the learning-related initiatives underway at the Ford Foundation's Office of Strategy and Learning and OSF's Grantmaking Support Unit; or the distinct but related investments in story process at the Hewlett Foundation and the Omidyar Network.

By documenting these relatively new programs for more collaborative strategy, story development, and learning, TAI and its members can assess the value of such culture shifts in the quest for better stories while also modeling a new type of transparency in the grantmaking process. Based on the priorities described by these teams and their stated interest in our work and findings, we believe the increased investment in learning across TAI members is a moment of opportunity, both to create more influential stories and to deploy stories and the story-making process as a more regular, impactful tool for learning inside and between organizations.

"If a story doesn't have conflict, it's just a report."

– funder representative

Transparency and Accountability Initiative is a collaborative of leading funders of transparency, accountability and participation worldwide. It envisions a world where citizens are informed and empowered; governments are open and responsive; and collective action advances the public good. Toward this end, TAI aims to increase the collective impact of transparency and accountability interventions by strengthening grantmaking practice, learning and collaboration among its members. TAI focuses on the following thematic areas: data use for accountability, strengthening civic space, taxation and tax governance, learning for improved grantmaking.

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