

Experience Design

with Lacy Stockton of Grassroots Dataworks

Dearest risk-taking nonprofit extraordinaire,

Thank you for joining the Experience Design Atelier at the 2019 NPI Annual Summit! This workshop could not have happened without you showing up fully and sharing a little bit (or a lot) of yourself. For your spontaneous contributions, I am forever grateful!

Attached you will find the suggestions we discussed on *how to design an experience*—whether a gala, fundraising event, community fair, or even a staff or board meeting—literally *any* gathering. This list is not prescriptive because design never is, but I hope it guides your thinking in new ways and beyond event categories, scheduling, and picking hors d'oeuvres. With a solid and specific purpose as a guide, you'll be surprised where your creativity can take you and how it can translate to supporting your nonprofit mission (and bottom line).

I hope my non-expert status encourages you. You can do this. You can rethink the ordinary and breathe life into the stale. If you need more inspiration, I recommend the work of Ida Benedetto, one of the great underground experience designers of our time, at patternsoftransformation.com and Priya Parker, a professional facilitator who wrote *The Art of Gathering*.

I hope that you explore what *could* be instead of relying on what should be at your next event or meeting. As Ida says, "Now, let's go do something risky, intimate, and generous together."

Best explorations,

Lacy

P.S. Always feel free to reach out to me at lacy@grassrootsdataworks.org to share your zany ideas, unexpected successes, or get data-driven insight into who you should invite to your next gathering, which digital communications work best, and other fun stuff!

| 1. Purpose | Examples from the Atelier |
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| <ul style="list-style-type: none"> - Not category or what we do (template selected: birthday, board meeting, seminar, gala) - Pinterest syndrome (or Martha Stewart, if you prefer) | |
| <p>1. Specific People can see themselves in it clearly</p> | <ul style="list-style-type: none"> - nonprofit leaders of NCW who organize events, want to improve outcomes, and are open to trying something new |
| <p>2. Unique How is this different from other gatherings of the same type?</p> | <ul style="list-style-type: none"> - outcome highly dependent on participants instead of a lecture |
| <p>3. Disputable (in a good way) Reverse engineer an outcome (Useful future decision-making filter)</p> <ul style="list-style-type: none"> o <i>Want</i> audience to be self-selecting | <ul style="list-style-type: none"> - participatory, creative at a <i>conference</i>? Will this work? |
| <ul style="list-style-type: none"> - Obstacles: <ul style="list-style-type: none"> o Too many goals, sometimes in conflict o Without purpose there are various unstated motives! | |

| 2. Risk + Transformation | Examples from the Atelier |
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| <ul style="list-style-type: none"> - "A threat to one's current state that could destabilize the way things are." - If uncontrollable elements fully tamed, destroys the transformative potential of the experience | |
| <p>1. Identify the risk type</p> <ul style="list-style-type: none"> o Social (group counselling) o Emotional (funeral) o Physical (wilderness trip) | <ul style="list-style-type: none"> - social risk in group shares, especially if other participants are known professionally |
| <p>2. Which risks to keep/remove? Reconnect, discover, open up to by confronting risk Let struggle and confrontation happen, in context Structure to mitigate and support risk</p> | <ul style="list-style-type: none"> - mitigating participant risk through masks, pop-up rules |
| <p>3. Why not harmony? Purpose! Harmony can be time-wasting and boring Generative process rather than preservationist</p> | <ul style="list-style-type: none"> - some people might not like it... the hope is most engage anyway! |
| <p>4. What is the transformation? Leave with a state of disoriented awe, later to reorder world view</p> | <ul style="list-style-type: none"> - hopefully participants later reflect on what the heck happened—and what it means for their work. |
| <ul style="list-style-type: none"> - Obstacles <ul style="list-style-type: none"> o Desire to control/tame | <ul style="list-style-type: none"> - taking a risk as an organizer by putting activity success in the hands of participants: if they show up fully it could be great |

| 3. Starting an Event | Examples from the Atelier |
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| <ul style="list-style-type: none"> - Begins at “moment of discovery” - How you prime people about the gathering is <i>how they show up</i> - Every element must embody the gathering’s purpose | <ul style="list-style-type: none"> - tried to create an intriguing workshop description for the conference program |
| <p>0. Positive exclusion Who is this gathering for <i>first</i>? Right size for goals <i>If everyone’s family, no one is family</i></p> | <ul style="list-style-type: none"> - intimate share group size (had to be dynamic based on who showed up to the workshop) - larger group discussion |
| <p>1. Naming Can be a self-selecting component for guests</p> | <ul style="list-style-type: none"> - meeting, workshop, brain-storming session, visioning lab, retreat, conference, <i>atelier</i> |
| <p>2. Invitation Sets the tone: language, images, video // how people show up</p> | <ul style="list-style-type: none"> - wasn’t an option in the context of the conference—had to create a “filter” at the door |
| <p>3. Early Pre-Ask For engagement, give to receive</p> | <ul style="list-style-type: none"> - would have asked for small pre-reflection like a reflection or photo |
| <p>4. Ushering: transition into event Clear out old, space for new experience No “waiting”—still hosting in down time</p> | <ul style="list-style-type: none"> - reflection task on “What is help?” |
| <p>5. Opening</p> <ul style="list-style-type: none"> o Establish legitimacy o Pleasant shock therapy to get attention o Never start with logistics (including sponsor thank you’s) | <ul style="list-style-type: none"> - owned the silliness of the experience |
| <p>6. Fuse from the very beginning Everyone should “see” one another</p> | <ul style="list-style-type: none"> - acknowledge members in the group - difficult with the unexpectedly large number of participants! |
| <ul style="list-style-type: none"> - Obstacles <ul style="list-style-type: none"> o Housekeeping and logistics o Trying to appease the sponsors | <ul style="list-style-type: none"> - at a conference, you never know who will show up to the workshop—or how many—and you have to (try to) be dynamic |

| 4. <i>Hosting</i> | Examples from the Atelier |
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| <ul style="list-style-type: none"> - Not a skipper-less ship - Power vacuum filled out of alignment with purpose - Must be sustained - <i>Freedom for the wolves has often meant death to the sheep.</i> | <ul style="list-style-type: none"> - respected time by ending on time (and cut out final activity that would have taken too long with number of guests) |
| <p>1. Protect guests: impose to serve them (not yourself) From each other, boredom, technology in their pockets</p> <p>Don't hold them hostage!</p> | <ul style="list-style-type: none"> - cut people off in their share - ask people to leave tech at the door |
| <p>2. Equalize your guests Leave titles/degrees at the door</p> | <ul style="list-style-type: none"> - masks and removal of nametags to equalize |
| <p>3. Connect your guests Start with host-guest, end with guest-guest connections (build community)</p> | <ul style="list-style-type: none"> - movement to more intimate groups for better connections |
| <p>4. Facilitate authenticity</p> <ul style="list-style-type: none"> o Plague of the "Conference Self" o Superficially intellectual, without emotional risk o Design talking prompts intentionally (allow the dark and the dangerous) o Use experiences over ideas o Leverage the stranger quotient | <ul style="list-style-type: none"> - storytelling selected over sharing to overcome the intellectualization in answering "what help is", make it more human |
| <ul style="list-style-type: none"> - Obstacles: Misunderstanding generosity: Does a laissez-faire approach really do guests a favor? <ul style="list-style-type: none"> o Quiet / newcomers / young / less experience? o Focus on elevating invitees/speakers/organizers over community | <ul style="list-style-type: none"> - not just lecture, but opted to show what an experience could look like |

| 5. Create an Alternate Universe + Tribe | Examples from the Atelier |
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| <ul style="list-style-type: none"> - Only exists once - Which you shows up? - <i>In a world of infinite choices, choosing one thing is a revolutionary act</i> | <ul style="list-style-type: none"> - space within conference to forget the conference (lighting, seating arrangement, masks, etc.) |
| <p>1. Embodies the purpose Spaces come with scripts Reconfigure the space, schedule, expectations (use old in new ways to shock people out of comfort)</p> | <ul style="list-style-type: none"> - simple lighting and chair rearrangement to switch up expectations and bring together participants |
| <p>2. Pop-up rules vs. etiquette Etiquette inadequate for diverse groups of people Need rules around share behavior</p> | <ul style="list-style-type: none"> - masks, participation agreement, elixir to return to conference room |
| <p>3. Physical boundary unleaky choose density of people</p> | <ul style="list-style-type: none"> - seal the door, make a circle - change density by activity |
| <p>4. Closing</p> <ul style="list-style-type: none"> - Accept the impermanence of a gathering - Don't "keep the spirit alive" and follow-up unnecessarily - Mirror of an opening: - Thanks/honoring should come well beforehand - Re-entry to world / rethink party favors (what to keep/discard?) | <ul style="list-style-type: none"> - closing of experience was intentional - closing of workshop was botched (Oops! The transitioning activity I intended would not work with the large number of participants, so I did...nothing. Sorry!) |
| <ul style="list-style-type: none"> - Obstacles Lack of clarity of purpose or commitment to it Venue limited by availability, cost, convenience, creativity | <ul style="list-style-type: none"> - worked within a standard conference venue and added inexpensive elements to try to spice it up |

Psst—One last note: If you're planning a fundraising event, always first determine your return on investment *including* staff, board, and volunteer time (currently valued at \$25 per hour on the national level). If it looks grim and you're spending close to (or more than!) \$1 to make \$1, consider your alternatives. There are many much more cost-effective ways to build brand awareness and community than expensive events, so don't get caught justifying cost-ineffective events that pull time away from delivering your mission just because you should or always have. Be clear on your purpose!

The most effective fundraising events we've analyzed at Grassroots Dataworks have been part of a larger strategy. They were small, *free* events for a *select* list of potential donors (no Bobs!) that creatively and powerfully highlighted the nonprofit's success—and they *didn't* ask for donations at the event! Following the event, the organizations followed up with each participant one-on-one. This strategy builds personal, enduring relationships and advocates, leverages the principle of reciprocity, and ensures “the ask” is perfectly scaled to each individual so no potential donation is left on the table.

Good luck!