September 2020

Advocating with Personal Stories

An Evaluation Toolkit

Developed by Wilder Research for Living Proof Advocacy

Living PROOF advocacy

Wilder Research®
Information. Insight. Impact.

Emma Connell, MPP
and
Jessie Austin, MPH

What is this evaluation toolkit?

This toolkit is an easy-to-use resource for advocates to evaluate their work using personal stories for advocacy. Wilder Research worked with Living Proof Advocacy to understand what evaluation methods are most useful; this is a summary of what we learned and some basics of evaluation. Use this toolkit to improve the impact of your work and share your successes and lessons learned with others.

This evaluation toolkit includes the following sections:

Introduction to Living Proof Advocacy 3

Impact of storytelling 4

Evaluating personal storytelling for advocacy 5

Logic models as a building block for evaluation 7

Moving to measurement: Using surveys to better understand your impact 11

Other evaluation options 15

Making sense of your data 17

Working together to prioritize and analyze data 21

Moving from evaluation to action 23

Bibliography 25

Tools & resources 27

Introduction to Living Proof Advocacy

Living Proof Advocacy, based in Minneapolis, helps purpose-driven organizations harness the power of first-person stories to drive positive change. They do so by providing coaching and consultation services to nonprofits, advocacy groups and other mission-driven organizations working on today's most important issues. Its staff of coaches and consultants equips individuals and organizations with the skills to effectively use personal narrative storytelling to advocate for a cause, organization, or mission. Living Proof Advocacy grew out of the work of Timothy Cage and John Capecci, authors of *Living Proof: Telling Your Story to Make a Difference.*

Living Proof Advocacy's work is grounded in five core beliefs, which are informed by research, best practices, and field experience.

FIVE CORE BELIEFS

1. *Personal stories* have the ability to engage and impact listeners in compelling ways.

2. *Live, spoken, face-to-face communication* is at the heart of advocacy and carries a tangible, physical presence and authority—especially as compared to written, visual, and digital communications.

3. *Advocacy is a persuasive act,* and personal stories help influence others.

4. *Personal stories help motivate change* in individuals and shift larger cultural narratives.

5. *Each individual's experience* of publicly sharing personal stories is complex and nuanced—emotionally, physically, socially, and psychologically.

For nearly 20 years, Cage and Capecci have helped hundreds of organizations and thousands of advocates share their stories to increase awareness, influence policy, raise money, and more—about issues including health and wellness, social justice, and environmental, agricultural, and safety concerns.

Impact of storytelling

Advocating to create change with personal stories makes a difference – and the literature supports that. Here are a few key findings from a recent literature review Wilder Research completed for Living Proof Advocacy.

> “*Storytelling is a great way to communicate . . . the heart and face behind the data . . . People will remember a story, but they won’t remember a number.*
>
> — Health and safety advocate, from recent interviews with Living Proof Advocacy

Why does storytelling matter for advocacy?

Storytelling is an inherently engaging and persuasive form of communication. Compared to other forms of communication that rely upon facts and statistics, personal stories elicit greater empathy, support higher comprehension, and are more likely to motivate action (Dahlstrom, 2014; Graesser et al., 2002; Slovic, 2007).

Personal stories are a means of illustrating how complex systems impact people’s lives, which can also help individuals realize connections between their personal struggles and larger political injustices (Clair et al., 1996; Dubriwny, 2005; Hancox, 2017; Neimand, 2018; Saltmarshe, 2018).

Personal stories are inherently persuasive, and can influence real-world knowledge and beliefs and discourage counter-arguments (Green, 2006; Green & Brock, 2000; Kennedy et al., 2018; Murphy et al., 2013; Oschatz et al., 2019).

What makes an advocacy story effective?

Stories are a useful tool for advocates, and can become even more powerful when used strategically. The literature describes certain characteristics of stories —relatability, transportation, and emotionality— that make them especially persuasive or impactful:

Relatability, in which audience members are able to identify with the storyteller (Green, 2006; Green & Brock, 2000; Murphy et al., 2013; Neimand, 2018).

Transportation, in which audience members are absorbed in the story (Green & Brock, 2000).

Emotionality, in which the storyteller uses descriptive, visual language to capture the emotion of their narrative (Bauer et al., 2009; Murphy et al., 2013; Neimand, 2018).

Evaluating personal storytelling for advocacy

Why should advocates evaluate their work?

Through evaluation, advocates are better able to understand and quantify the impacts of their work. This is important not only for advocates to improve their work in order to have a greater impact, but also to demonstrate the impact of their work to funders and other stakeholders.

However, advocacy work, particularly advocacy with personal stories, is challenging to evaluate for a number of reasons:

Advocacy efforts must be *flexible* in their approach. Advocates need to constantly adapt their strategies to meet emerging opportunities and policymakers' priorities (Glass, 2017). This makes it difficult to use a traditional evaluation approach of measuring pre-determined activities and outcomes.

It is difficult to determine and prove which specific advocacy efforts *lead to any given change,* due to the complexity and variety of different individuals, organizations and strategies working toward the same goal (Arensman et al., 2018). Additionally, the impacts of advocacy's "quiet work," which lays the foundation for eventual change, are much more difficult to discern than larger, louder, and temporally connected advocacy efforts that bring about change (Teles & Schmitt, 2011).

Decision-makers may not know or be willing to admit that they were *persuaded by advocacy efforts.* Advocacy efforts are complex and decision-makers may not fully understand which components persuaded them, and to what degree, to change their mind about or take action on a particular issue. Decision-makers may also be unwilling to admit to being persuaded by advocacy efforts and stories (van Wessel, 2018).

> *"There's a lot of grant opportunities or funding opportunities that only exist because we have a fairly robust evaluation platform, because otherwise they're not going to be willing to fund something that they can't show the results of.*
>
> — Environmental advocate, from recent interviews with Living Proof Advocacy clients

Evaluation experiences from advocates in the field

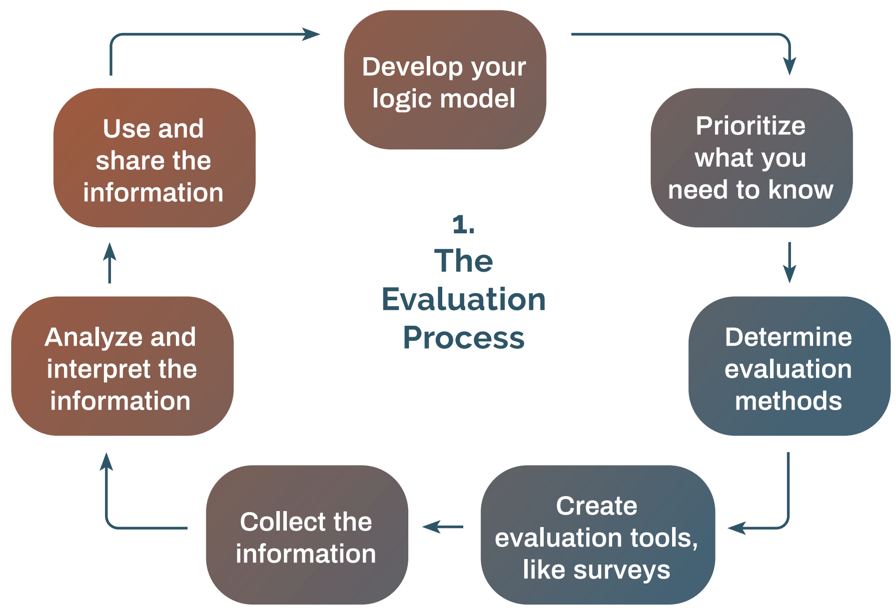
In the fall of 2019, Wilder Research partnered with Living Proof Advocacy to conduct a field scan of organizations using first-person stories for advocacy. To this end, Wilder Research interviewed five advocacy organizations about how they use stories for advocacy, their successes, barriers faced, and their experiences with evaluation.

Advocates had this to say about their experiences with evaluation:

Many advocacy organizations' work centered on achieving two primary outcomes: awareness and empathy. For example, one organization focused on sharing stories of individuals who had experienced homelessness. Through increasing awareness about the prevalence and experiences of homelessness in their community, and increasing empathy for those who have experienced homelessness personally, this organization hoped to increase community support for building more affordable housing.

Organizations reported facing barriers to evaluating their work using first-person stories for advocacy. Respondents reported difficulty in creating evaluation tools to measure their desired outcomes, lacking time or resources to dedicate to evaluation, feeling that distributing surveys following emotional events was inappropriate, and difficulty collecting a representative sample of feedback and experiences from their audience members (that is, feeling that audience members who voluntarily reach out to them are more likely to have a highly positive experience than the audience members they don't hear from).

Advocacy organizations reported that their formal evaluation work is limited, due in part to the challenges mentioned above. Some respondents reported distributing surveys to members of their organization and event audience members, in order to measure the impact of their advocacy on attitudes and behaviors. More frequently, however, organizations reported relying on anecdotes or testimonials from their audience members as evidence of the impact of their work.

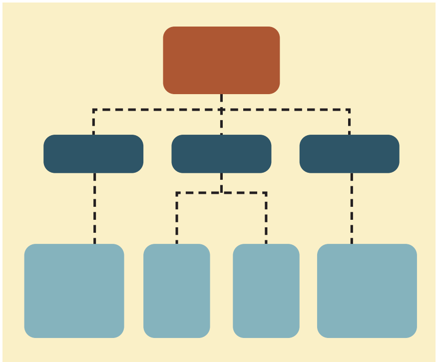


Logic models as a building block for evaluation

For most advocates (and anyone who wants to do an effective evaluation), establishing a logic model and using that to develop surveys is the most appropriate method to evaluate the impact you're making with stories. A logic model is a roadmap to how you think your storytelling or other advocacy efforts make a difference. After you create your logic model, you then measure the impacts you are claiming by surveying audience members or other stakeholders. You can then use the results to help you improve and strengthen your advocacy.

What's a logic model?

A logic model is a tool that organizations and individual advocates can use to articulate and visually represent their "theory of change," which is their theory of how their advocacy will lead to the changes they want to see (Holm-Hanson, 2006). The process of developing a logic model can be helpful in and of itself: advocacy organizations and individual advocates can work together to understand which activities and outcomes are necessary to reach their goals, articulate underlying assumptions and beliefs about how their advocacy will affect change, and lay a foundation upon which to build an evaluation plan (Wilder Research, 2010). Additionally, logic models are a useful way for advocates to clearly describe their work to potential funders (Wilder Research, 2010).



Logic models often take the form of a flow chart or a table, with the work and the intended impacts falling into four main buckets: inputs, activities, outputs, and outcomes (Holm-Hanson, 2006; Wilder Research, 2010). Here, we provide examples that apply to a hypothetical mental health advocacy organization.

Inputs: The resources and materials that go into the advocacy work

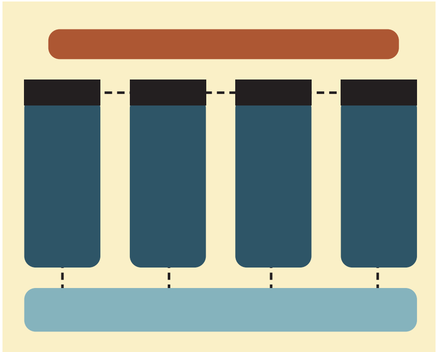
FOR EXAMPLE: Funding, staff, volunteer advocates, event venue

Activities: The actions, events, and strategies intended to prompt changes

FOR EXAMPLE: Storytelling events, storytelling or advocacy training, media campaigns, community meetings

Outputs: The *amount* of actions, events, or strategies conducted, often represented as numbers

FOR EXAMPLE: The number of events, the number of people who attended each event, the number of advocates trained, number of views on a YouTube video of an advocacy story



Outcomes: The change that results from the advocacy work. Because of the complexity of advocacy work, particularly personal storytelling for advocacy, advocates might find it helpful to break their outcomes down into three categories: short-term outcomes, intermediate outcomes, and long-term outcomes.

Short-term outcomes

Changes in knowledge, attitudes, and skills

FOR EXAMPLE: Increased knowledge about mental health, increased positive attitudes about seeking treatment for mental health concerns, increased skills in identifying signs of depression or anxiety in family or friends

Intermediate outcomes

Changes in behavior

FOR EXAMPLE: Increased number of people who seek support for their mental health

Long-term outcomes

Changes on a larger, community-wide scale, often beyond the people directly reached or served, or an advocate's vision for the greater impact that their work will have on individuals, families, communities, or issues

FOR EXAMPLE: Decreased cultural stigma around mental health, increased access to mental health care

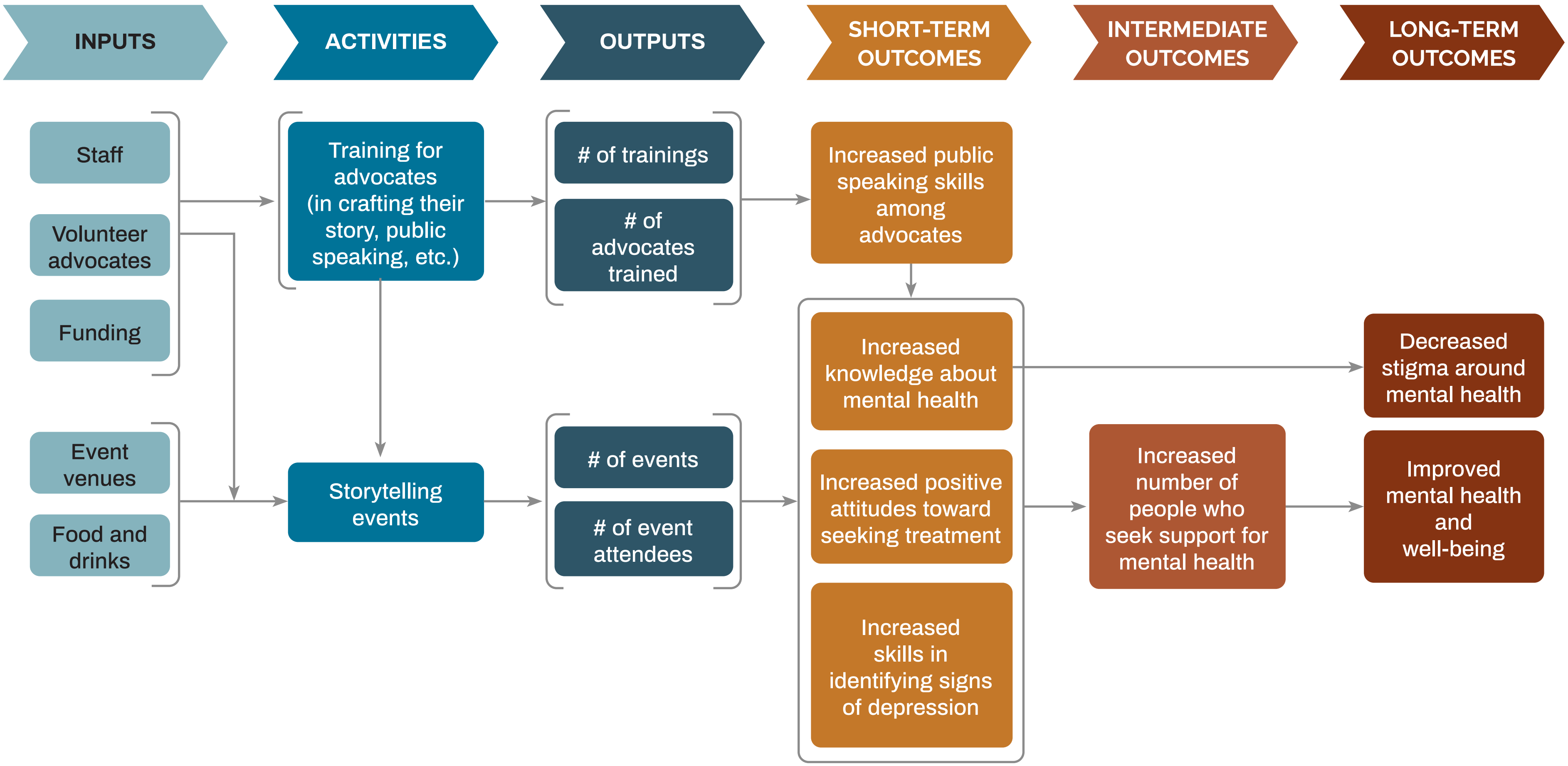
> All outcomes should be directional; use words like increased, improved, decreased, reduced, etc.

> The logic model should also show connections between inputs and activities, between activities and outputs, and between outputs and short-term, intermediate, and long-term outcomes, sometimes represented through arrows from one box to the other. These connections should be "logical," meaning that they make sense to a reasonable observer and are based on what's already been shown to be true in previous research.

2. Basic outline of a logic model

Inputs	Activities	Outputs	Short-term outcomes	Intermediate outcomes	Long-term outcome/ Overall Impact
Resources Funding	Offer...	# % $	Changes in awareness, knowledge, attitude, skill, appreciation, motivation, opinions, aspirations	Changes in behaviors or practices	Change in organizations, communities, systems or society

3. Example logic model for an organization advocating for mental health issues using personal stories



It's a great idea to start any evaluation work by creating a logic model. This will help you and anyone you are working with ensure you are on the same page about what you are doing and your intended outcomes. It will also make it much easier to develop a survey or pursue additional evaluation, since you will have already determined what kinds of things you want to measure.

Types of evaluation

Evaluation is a systematic process to examine how a program or initiative is working and what kinds of impact it's making. This information can help those running the program or initiative improve its outcomes, avoid unintended consequences, and easily explain to others why the work matters.

There are different types of evaluation; any or all of these types of evaluation may be right for you and your organization, depending on how developed your program or initiative is.

Needs Assessment is a way to collect community input about their priorities.

Developmental Evaluation aims to provide real-time feedback to program or initiative staff to guide tweaks and changes to programs or initiatives that are new or still in development, so that the evaluation can inform the ways in which the program or initiative grows and changes. This approach requires flexibility to respond to questions as they emerge.

Process Evaluation investigates how your program or initiative has been implemented, and if implementation happened as intended. This method examines the "activities" and "outputs" sections of the logic model.

Outcomes Evaluation measures the effect of your program or initiative on its participants and those otherwise involved. It examines the "outcomes" sections of your logic model.

Impact Evaluation assesses the overall impact of your program or initiative on longer-term goals. While outcomes evaluation looks to the effect of programs or initiatives on individuals, impact evaluation looks to understand how those outcomes have ultimately led to changes in broader communities.

OUTCOMES EVALUATION

For the purposes of this evaluation toolkit, we'll focus on outcomes evaluation. We focus on this for a few reasons:

- ☑ It can be implemented with more easily ***accessible methods***
- ☑ It is often what programs and initiatives are most interested in to help them ***determine any changes*** to better achieve their goals
- ☑ It can help programs and initiatives communicate about their program or initiative to funders and other stakeholders in ***concrete, tangible*** ways

Moving to measurement: Using surveys to better understand your impact

Now that you've solidified an understanding of what changes you expect to see as a result of your work through your logic model, it's now time to confirm that you are making the impact(s) you think you are making.

Surveys (either online or paper-and-pencil) are a relatively easy and cost-effective means of collecting information from a large group of people (Wilder Research, 2009). Surveys are most useful when you'd like to get a little bit of information from a group of people. If you're interested in learning about people's in-depth experiences and perspectives, though, another method of data collection (such as one-on-one interviews or focus groups) may be a better fit (Wilder Research, 2009). It's always important to consider the context of your events when designing a survey; see page 13 for additional guidance.

8 Tips for creating a survey to assess your advocacy's impact:

1. Keep it short and focused.

Make your survey as long as it needs to be to gather necessary information, but if it's too long, participants may grow tired and give up before they finish. Focus on asking questions that will answer your key evaluation questions and provide useful data that you can act on. Developing a logic model first can help your organization determine what those key evaluation questions are. A survey with just 5-10 questions might be enough to answer your essential questions.

2. Tailor it to your audience.

Much like how advocates would tailor their storytelling to their audience, your survey should be tailored to its participants. Ensure the language you use is culturally and age-appropriate, and ensure your survey is written at an accessible reading level. Importantly, you should also be sure the survey asks about the topics you actually covered with this audience. (You don't want to measure outcomes that you are unlikely to achieve because you didn't actually do any activities related to that outcome!)

3. Be clear.

Ensure that your sentences are clear and direct, that you don't use jargon, and that your response options are commonly understood words and phrases. For example, "several" means different things to different people.

For general adult audiences, we recommend you keep your survey to an 8th grade reading level. If you're working with a different population, be sure to think about what reading level makes sense for them.

We recommend you test your readability level using the Flesch-Kincaid readability test; they provide this for free at their website.

4. Use closed-ended questions.

When possible, use questions with structured response choices (e.g., yes or no; strongly agree, agree, disagree, strongly disagree). These questions are easier to both answer and analyze. Make sure your response options include everything you need and don't overlap (mutually exclusive; see below for an example). One or two fill-in-the-blank questions are fine (e.g., "What is the one thing you liked best about this program?"), but they add to respondent burden, most people don't write very much, and this type of data are more labor-intensive to analyze.

4. Closed-ended examples

✗

How old are you?

- ☐ age 20-30
- ☐ age 30-40
- ☐ age 40-50
- ☐ age 50-60

This survey question doesn't provide an option for respondents who are younger than 20 or older than 60 – make sure your response options include all possible answers.

These response options overlap! A 30-year-old could check one of two of these boxes, which would make interpretation imprecise.

It's good practice to give respondents an "out" for questions that could be sensitive to them.

✓

How old are you?

- ☐ 19 or younger
- ☐ age 20-29
- ☐ age 30-39
- ☐ age 40-49
- ☐ age 50-59
- ☐ age 60+
- ☐ Prefer not to answer

5. Be neutral.

To avoid biasing your participants' responses, phrase questions and response options neutrally, without language that suggests one or another is the "right" answer.

6. Don't ask double-barreled questions.

Each survey item should only ask one question. If you bundle two or more questions into one, it can make responses uninterpretable. For example, if you ask audience members to write a short response to the question, "What was your favorite and least favorite thing about today's talk?" you won't know whether or not respondents are saying they liked or disliked the aspect they mention unless they provide clarifying context.

7. Test it out first.

Have people who didn't create the survey (your co-workers, friends, or family) take the survey and provide feedback on the questions and, in particular, if any were difficult to understand or answer.

8. Don't recreate the wheel.

There are lots of surveys out there on a range of topics. Try to search the internet for the word "survey" and your particular topic and you might find some great example questions you could borrow. (Remember to ask permission from the survey author if needed to avoid copyright infringements.)

Consider the context

Surveys can be conducted either on paper (in-person or through the mail) or online (through a free online survey tool). Choose a format that works best for you and is accessible for your audience.

If you or your organization is hosting in-person events, distributing a paper survey immediately after the event may increase your chances of hearing from all of those who attended. If the subject matter of your event is emotionally charged, it may be preferable to collect attendees' contact information on an event sign-in sheet and email them a link to an online survey afterward. However, you should keep in mind that this approach may result in lower participation, especially if your audience doesn't have good internet access or if they are not as familiar with online formats.

Alternatively, if you hope to gather feedback from a large, geographically dispersed network of people, an online survey may be the most convenient, feasible, and accessible option.

Think about the ways you communicate with your audience. Do you reach most people through in-person talks? Do you have a strong social media following? Do lots of people visit your website? Some organizations have a membership list with contact information; this provides a great opportunity to reach out to those who interact with you or your organization to better understand their perceptions of your work and what impact it's having on their lives.

5. Survey example

This survey primarily uses close-ended responses, with participants rating their level of agreement with each statement. These responses will be easy for participants to respond to, and easy for an organization to interpret and understand.

Questions 3 and 5 assess the audience's level of awareness—in this case, of others' experiences of mental health and how common mental health conditions are.

Be sure to keep your questions worded at an accessible reading level, and avoid using jargon—for example, this question would be less accessible if it were phrased as "Mental health parity should be required in health insurance plans."

Question 8 is an open-ended question, which may be more difficult to answer and analyze, but that may provide more in-depth information about participant thoughts and experiences—in this case, related to what they learned from the storytelling session.

Thank you for attending [event name]. So we are able to improve our future events, we ask that you fill out this short survey. It should take less than 5 minutes to complete, and your individual responses are confidential. If you have any questions, please contact [staff member] at [phone number].

Please circle your level of agreement for each statement.	1 Strongly agree	2 Agree	3 Neither agree nor disagree	4 Disagree	5 Strongly disagree
1. I could relate to the storytellers in this session.	☐	☐	☐	☐	☐
2. The stories told today affected me emotionally.	☐	☐	☐	☐	☐
3. Because of this session, I have a greater understanding of how others experience mental health conditions.	☐	☐	☐	☐	☐
4. If my friend or relative was struggling with their mental health, I would know where to direct them for help and support.	☐	☐	☐	☐	☐
5. Many adults experience some form of mental illness at some point in their lives.	☐	☐	☐	☐	☐
6. Health insurance plans should treat mental health conditions and physical health conditions equally.	☐	☐	☐	☐	☐
7. Whether someone has a mental health condition is related to personal weakness, lack of character, or poor upbringing.	☐	☐	☐	☐	☐

8. What is the most important thing you learned from this storytelling session?

____

____

When creating open-ended questions, avoid asking double-barreled questions like, "What is the most important thing you learned from this storytelling session and what surprised you the most?" In analysis, it would be tricky to distinguish between what survey participants found most important, and what surprised them the most, unless they explicitly said so (which people do not always do!).

Assign numbers (either on the survey, or afterwards on the back-end) to the rating scale to make analysis and interpretation of your data easier.

Question 1 assesses relatability, one of the pieces of storytelling that's been found to be effective.

Question 2 assesses transportation, in which an audience member is absorbed into the story; this is another piece of storytelling that's been found to be effective.

Question 4 assesses the audience's level of knowledge—in this case, of mental health resources

Questions 6 and 7 assess participant attitudes—in this case, toward the policy issue of mental health parity and personal stigma around mental health. This can help you assess if you need to provide more or different information to participants.

Other evaluation options

You might also want to use evaluation tools other than logic models and surveys to evaluate the impact of your advocacy efforts. Below are a few different approaches you could pursue. We provide links for you to read more about the methods that interest you. Try these yourself or consult with a professional evaluator who has expertise in the method(s) you want to use.

Outcome Harvesting

An external partner or "harvester" collects information through methods like interviews, focus groups, and document review on what outcomes individuals or organizations believe they have achieved (Wilson-Grau & Britt, 2012). This method is reflection-based. Rather than examining progress over time, it pinpoints a given outcome and works backward to determine how the intervention contributed to that outcome (Wilson-Grau, 2015). This type of work requires substantial time and resources, and would benefit from an external evaluator with experience in this approach. For more information, see Outcome harvesting.

If you want to work with a professional evaluator, check out the American Evaluation Association (AEA). Many states have local AEA affiliates that can help you to find a qualified evaluator in your area.

Narrative Assessment

This method of evaluation marries theory of change work with narrative. Within this approach, an evaluator and an advocate walk through the narrative of an initiative's change (van Wessel, 2018). The evaluator, who is an individual external to the advocacy effort and, preferably, an evaluation expert, sits down with an advocate and listens as the advocate recounts the process of their advocacy effort and the outcomes they believe the effort was able to create. The external evaluator critically engages the story and probes to determine whether or not it's plausible that the advocacy activities contributed to the stated outcomes. It does not involve the evaluator validating points of the story using other data sources (triangulation), unlike Outcome Harvesting. This type of work benefits from the help of an external evaluator, or at a minimum an external observer who can use evaluative thinking. For more information, see Narrative assessment: A new approach to advocacy monitoring, evaluation, learning and communication.

Contribution Analysis

The Contribution Analysis process begins with identification of which questions the evaluating group wants to answer (Mayne, 2008). These often revolve around understanding whether or not a program or initiative contributed to an observed outcome and, if so, to what extent it has made a difference. Those participating in the analysis then work together to create a theory of change to spell out how the program or initiative is supposed to work. The analysis team identifies existing evidence for the program, based on either published literature that addresses these presumed causal connections or evaluation or research specific to the program or initiative that is being assessed. The analysis team then creates a story to describe why it's reasonable to think that their story has led to these outcomes. For more information, see Contribution analysis: An approach to exploring cause and effect .

For full description of these evaluation approaches, see Evaluating Personal Narrative Storytelling for Advocacy.

6. Examples of these evaluation methods in practice

A state legislature recently passed legislation that provides funding for additional mental health counselors in public schools. A small organization within the state that supports advocates who share stories about their own mental health journeys believes that their work contributed to the legislature passing this bill. In brief, here is how these evaluations could look:

Outcome harvesting:

The organization partners with an evaluator who conducts interviews and focus groups with organization staff and potentially some external stakeholders who are deeply familiar with the organization's work. The evaluator examines documents the organization provides about their work leading up to the bill's passage. The evaluator examines all of this evidence and provides a report summarizing the ways in which the organization likely contributed to the legislation being passed, with evidence cited.

Narrative assessment:

The organization partners with an evaluator who conducts one or more meetings with organization staff. In these discussions, the evaluator and organization staff walk through the timeline of the organization's work leading up to the legislation being passed. The evaluator probes with questions throughout these discussions, and ultimately comes back to the organization with a summary of those discussions, specifically, all of the plausible ways the organization contributed to the legislation being passed.

Contribution analysis:

The organization partners with an evaluator who facilitates discussions with the organization to determine the questions they would like to answer. From there, the evaluator works with the organization to develop a logic model. The evaluator then examines the literature and relevant research to find evidence that supports the flow of the logic model. Then, the evaluator and organization work together to create a report detailing their own story and how the evidence supports the case that their advocacy work contributed to the passage of the legislation.

Making sense of your data

Now that you've distributed your survey and have gathered original data about your advocacy with personal storytelling, what do you do with it? The appropriate approach will depend on what type of data you collected in your survey. The data you collect will fall into one of two categories (Wilder Research, 2011):

 # *Quantitative data:* Quantitative data are information you count and measure numerically. In addition to survey questions with numerical responses (e.g., respondents' ages, the number of workshops they have attended), survey questions with close-ended responses, like those with a rating scale as seen above, can be numerically coded and interpreted to produce quantitative information. Quantitative data are used to answer questions that start with "what" and "how many": for example, how many people agreed (responded either "agree" or "strongly agree") with the statement, *"Because I heard these personal stories, I have a greater understanding of how others experience mental health conditions"*?

Qualitative data: In contrast, qualitative data are non-numerical—it can be categorized, but it can't be assigned numbers, counted, or measured. This type of information is typically collected through open-ended responses in surveys, as well as interviews and focus groups. Qualitative data are used to answer "why" and "how" questions, provide rich contextual information, and tell the story of your data.

Quantitative data analysis: The basics

The purpose of quantitative data analysis is to "describe, summarize, and compare data" using statistical methods (Centers for Disease Control and Prevention [CDC], 2018, p.1). Below, basic methods for quantitative data analysis are described. However, if no one on your team has statistical training or experience, it may be wise to consult with or hire someone with these skills, especially if you intend to go beyond the basics.

To start exploring and making sense of your quantitative data, try calculating the following statistics (CDC, 2018):

Means, medians, and modes are statistics that measure the most typical values of your data set. You can calculate the mean (also known as the average), by adding together all the numerical values of question responses, and dividing that sum by the total number of responses. You can find the median value by putting all the responses in order, and determining which value falls in the middle. The mode is equal to whichever response value is the most common. If you have outliers in your data set, they could skew your average up or down. In those cases, a median might be most helpful to you. If you have a standard distribution of scores, in which most scores are pretty similar to one another, a mean works well.

FOR EXAMPLE: People who heard the personal stories at our event indicated how much they agreed or disagreed with the statement "I found my mind wandering while hearing the story" in which 1= strongly disagree and 5 = strongly agree. The average score for this question was 2.2 (mean), the median rating was 2 and attendees most frequently responded with a 1 (mode). Because of this, we know that the storyteller was generally able to transport the audience into the narrative.

Frequencies are counts – or the number of responses that are equal to a specified value.

FOR EXAMPLE: 14 of 20 survey participants agreed that they could relate to the storytellers at an event.

Percentages are frequencies divided by the total number of responses and multiplied by 100.

FOR EXAMPLE: 70% of survey participants (14 divided by 20, multiplied by 100) agreed that they could relate to the storytellers at an event.

$$14 \div 20 \times 100 = 70$$

Frequencies and percentages are most useful when your quantitative data has a limited number of possible values—like a rating scale that ranges from 1= "Strongly agree" to 5="Strongly disagree." However, if you have data with many possible values (such as the participants' ages, income, or even the number of workshops attended), you can always sort the numerical data into categories afterward and calculate frequencies and percentages from there.

Now that you have these quantitative statistics, how do you make sense of them?

With frequencies, start by looking at which response within each question is most common. Are most people agreeing with a statement? Disagreeing? Or is there an even distribution, with a wide variation in opinions?

Then, look across questions to see which aspects of knowledge, beliefs, or attitudes seem to be "doing better" compared to others and which could use improvement.

Using the example survey above, maybe out of your 15 hypothetical audience members, 13 people (87%) agreed with the statement "I could relate to the storytellers in this session" and 12 people (80%) agreed with the statement "Because I heard these personal stories, I have a greater understanding of how others experience mental health conditions"—but only 4 people (26%) in the audience agreed with the statement "If my friend or relative was struggling with their mental health, I would know where to direct them for help and support." This might tell you that your audience seemed to connect and empathize with your advocate's story and experience, but they may not have gained sufficient knowledge from the story related to mental health resources.

Means, medians, and modes give you a sense of what is a "typical" response to your questions. It is easy to compare these statistics for changes across time. For example, if the average rating that audience members give your storytelling goes up over time, that may provide evidence that you are making constructive changes to make your storytelling and advocacy more engaging!

Tip: Pay attention to the "direction" of your survey questions, and whether they're phrased "positively" or "negatively." For example, both questions 6 and 7 in the example survey assess participant attitudes toward mental health. However, question 6 ("Health insurance plans should treat mental health conditions and physical health conditions equally.") assesses positive attitudes toward mental health issues, while question 7 ("Whether someone has a mental health condition is related to personal weakness, lack of character or poor upbringing.") assesses negative attitudes towards mental health issues.

Someone responding that they "strongly agree" with question 6 means something very different than responding that they "strongly agree" with question 7.

If some of your survey questions are worded positively and others negatively, take care when analyzing and interpreting your results. This is especially important to consider when calculating the mean, median, and mode.

Be aware of limitations to your quantitative data

Be careful not to draw definitive conclusions about changes you might observe. A couple of common limitations are:

> Comparing different groups of people: you don't know if differences are due to your work or to already-existing differences between audiences

> Surveying people at only one point in time: you don't know for sure whether or not knowledge, attitudes, or behaviors changed because of your work

This isn't to say that these types of data aren't helpful. Instead, we just encourage you to think thoroughly about what you can and cannot say definitively after conducting your survey. If you want to take a more robust evaluation approach to more definitely assess the impact of your work, consult with evaluation professionals in your area.

This is what, in research and evaluation, we call "establishing causality"—establishing that the change you observe is actually due to a hypothesized cause. Establishing causality is difficult to do and requires sophisticated, robust (and often expensive!) research and evaluation methods. However, for your organization's purposes of learning and growth, establishing causality is likely not necessary.

Every organization evaluating their work should be careful not to overextend their findings and the conclusions drawn from their data.

It is still valuable to identify ways that your storytelling has been a contributing factor to positive change; just be careful about how you discuss your results.

Qualitative data analysis: The basics

Qualitative data helps you dig into questions of "why?" and "how?" It's collected using methods like interviews, focus groups, and observations. You can also collect qualitative data in surveys by asking open-ended questions like, "What was your biggest takeaway from today's event?" or "What's one suggestion you have to improve this personal storytelling session?

It can be tempting to make sweeping generalities based on anecdotes, and qualitative data are more susceptible to the analyst's bias. That's why it's so important to make the collection and analysis of qualitative data systematic. This can be done through coding, or assigning a word or short phrase to each longer response.

For the purposes of this toolkit, let's focus on analyzing open-ended survey responses. After you've collected your survey responses, enter the data into a spreadsheet you'll use to code your responses.

Oftentimes, it's helpful to get familiar with the responses before putting together something called a codebook. A codebook is a one-stop-shop where you can see which codes are assigned to which numeric or alphanumeric values.

As you code, you'll see themes. These themes can serve as an umbrella under which different codes will fall. In the example below, you can see that a few responses addressed the ways in which audience members walked away from a session about homelessness knowing what they can do on an individual level to affect change. These types of responses can help the speaker understand what resonated with audience members and if they need to add different content to their story to emphasize different takeaways.

7. Qualitative coding example

Question: What's one suggestion you have to make today's session better?		
Theme	**Supporting Code**	**Supporting Quotes**
Audience members walk away knowing what to do next	B15. Knowledge of who key players/decision-makers are	" I didn't know before how much power mayors have to address homelessness in their community; now I know who I need to contact to make change."
	B16. Knowledge of available resources/materials/tools	" Because of this session, I know where I can go to learn about the prevalence of homelessness in my community."
	B17. Knowledge of methods to use to make changes	" The speaker today spoke about how they had coordinated with friends, families, and neighbors to all call the mayor's office to advocate for changes in homelessness policy – I would have never thought of that before."

Once you've coded all your responses, ask yourself these questions:

> Are there emerging patterns or themes?

> What stands out to you?

> Did anything surprise you?

> Do these responses lead you to have more questions?

> Should anything about your work change, given these results?

Working together to prioritize and analyze data

As the saying goes, two heads are better than one! It might be hard to figure out exactly what data you want to collect. It's a great idea to work in a team to figure out what the priorities are for the whole group and to brainstorm how to collect that information.

Team-based inquiry

One concrete method you can use to do this is team-based inquiry. This is a collaborative process that aims to bring consensus among a group to determine evaluation priorities. You can use team-based inquiry to:

> Brainstorm questions of interest to you and your team
> Identify the importance and usefulness of those questions and their eventual results
> Identify appropriate data methods and sources to collect the data
> Prioritize questions going forward

Start with what you need to know

Oftentimes, there are many, many things that would be nice to know, but a smaller number of things that you really *need* to know.

> The tool you can use for team-based inquiry can be found on the next page. Bring a group of key stakeholders together to work through this worksheet. Start by figuring out what key questions you have. For example, "Are audience members actually learning something new from my talk?" or "Do audience members know what to do with the information I've given them?" Then, discuss why the question matters and what changes you might want to make given the results of the data you collect. Next, discuss the method by which you would collect this information. Finally, determine how high a priority those data are for your team.
> Team Based Inquiry – Question Phase
> Prioritizing Evaluation Questions
> **Fill in the table below** for each of the broad inquiry questions that you and your team have brainstormed. Based on how useful, actionable, and feasible each question is, determine whether it is a high, medium, or low priority for evaluation. From here, an evaluation plan and evaluation tool(s) can be developed.

Inquiry question	Why is this question important to your team?	What changes might you be able to make if you answered this question?	What types of information would you need to answer this question and what is the best method to collect it?	How high a priority is this question? H= High, M = Medium, L = Low
Example: *What are the greatest misperceptions teens have about mental health?*	*Helps the team better understand barriers teens face to accessing mental healthcare.*	*Add examples to our stories to show that these misperceptions aren't true.*	*Surveys of high school students.*	*H* *M* *L*

Adapted from: NISE Network TBI Guide: http://www.nisenet.org/catalog/team-based-inquiry-guide

Creator: NISE Network

Once you've collected data, it's a great idea to work with others to analyze and interpret the results and what that means for your work going forward.

Participatory analysis involves convening stakeholders (including participants, staff, community members, experts in your field, etc.) and jointly analyzing and interpreting the data in order to determine meaning. The purpose of this is to:

> Bring in multiple perspectives, opinions, and voices

> Build trust and create buy-in among stakeholders

> Demonstrate commitment to using the results

Moving from evaluation to action

Tweaking your advocacy with first-person stories

The results of your evaluation can and should ***inform the way in which you do your work.*** You might learn that some things are going really well or resonate with your audience; this can solidify a set of critical components of your work (your "special sauce") that you can then document and communicate more clearly to stakeholders.

You also might learn that you're not having your intended impact on a particular topic or with a particular audience. People could report that a story had not resonated with them or that they didn't gain the knowledge you wanted them to. Evaluation results like this can ***help you identify tweaks and larger changes*** to make to your approach to advocacy storytelling. You'll be able to ask the same questions over time to understand if the changes you made led to improvements or if you need to figure out a different strategy. You also might realize ***you have more questions*** you'd like to ask of your audience after you've done a few initial surveys. Evaluation is all about continuous learning and growth!

Speaking to funders and stakeholders

Evaluation provides an excellent opportunity for you to share your successes and learnings with funders and stakeholders. This can help you make the case for continued funding to sustain your work. It's also a helpful way to communicate your impact to new funders; they can quickly see exactly what you're trying to achieve through your work, as well as evidence that you're achieving those outcomes. When communicating your findings to different groups, think through how you can build a story from your data.

For example:

> *"We recently had 5 advocates go to high schools around the state to share stories about their own struggles with mental health issues. Our stories made a difference: 85% of students said they learned about new resources they can access if they're struggling with their own mental health. They're also more likely to reach out for support: 73% said that this session made them feel more comfortable reaching out to family and friends to talk about their mental health."*

Using your logic model and evaluation results can also help you communicate about how and why you do what you do, which can help you to communicate clearly with potential clients, new audiences, staff and volunteers, and colleagues too!

Sharing results with the field

As mentioned before, storytelling for advocacy is a hard thing to evaluate. That means that whatever you learn through your own evaluation may be useful for others. Share what you find through a variety of mediums, from informal conversation to discussion boards to conference presentations. Put yourself out there by using evaluation to enhance learning (yours and others'), improve storytelling advocacy techniques, and establish the impact storytelling can have on individual and group behavior. Don't feel that you can *only* share the results of your evaluation – share your methods and why you chose them, too. This can help others learn how to do similar types of evaluation to inform their work. Ultimately, evaluation will benefit the field of advocacy by identifying and sharing promising practices for how storytelling can make an impact on the world around us.

Bibliography

Arensman, B., van Waegeningh, C., & van Wessel, M. (2018). Twinning 'Practices of Change' with 'Theory of Change': Room for emergence in advocacy evaluation. *American Journal of Evaluation*, *39*(2), 221–36. https://doi.org/10.1177/1098214017727364

Bauer, L. M., Olheiser, E. L., Altarriba, J., & Landi, N. (2009). Word type effects in false recall: Concrete, abstract, and emotion word critical lures. *American Journal of Psychology, 122(4),* 469-481.

Centers for Disease Control and Prevention. (2018). *Analyzing Quantitative Data for Evaluation.* https://www.cdc.gov/healthyyouth/evaluation/pdf/brief20.pdf

Clair, R. P., Chapman, P. A., & Kunkel, A. W. (1996). Narrative approaches to raising consciousness about sexual harassment: From research to pedagogy and back again. *Journal of Applied Communication Research, 24*(4), 241-259. https://doi.org/10.1080/00909889609365455

Dahlstrom, M. F. (2014). Using narratives and storytelling to communicate science with nonexpert audiences. *Proceedings of the National Academic of Science, 111*(4), 13614-13620. https://doi.org/10.1073/pnas.1320645111

Dubriwny, T.N. (2005). Consciousness-raising as collective rhetoric: The articulation of experience in the Redstockings' abortion speak-out of 1969. *Quarterly Journal of Speech, 91*(4), 395-422. https://doi.org/10.1080/00335630500488275

Glass, J. (2017). 'Advocates change the world; Evaluation can help': A literature review and key insights from the practice of advocacy evaluation. *Canadian Journal of Program Evaluation, (32),* 1. https://doi.org/10.3138/cjpe.31039

Graesser, A. C., Olde, B., & Klettke, B. (2002). How does the mind construct and represent stories? In M. Green, J. Strange, & T. Brock (Eds.), *Narrative Impact* (pp. 229-262). Erlbaum.

Green, M. C. (2006). Narratives and cancer communication. *Journal of Communication, 56*, S163-S183. http://dx.doi.org/10.1111/j.1460-2466.2006.00288.x

Green, M. C., & Brock, T. C. (2000). The role of transportation in the persuasiveness of public narratives. *Journal of Personality and Social Psychology, 79*(5), 701-721. http://doi.org/10.1037//0022-3514.79.5.701

Hancox, D. (2017). From subject to collaborator: Transmedia storytelling and social research. *Convergence: The International Journal of Research into New Media Technologies, 23*(1), 49-60.

Holm-Hansen, C. (2006). *How to build a logic model.* Wilder Research. https://www.wilder.org/sites/default/files/imports/crimevictimservices6_4-06.pdf

Holm-Hansen, C. (2006). *What a logic model can do for you.* Wilder Research. https://www.wilder.org/sites/default/files/imports/crimevictimservices5_1-06.pdf

Kennedy, M. G., McClish, D., Jones, R. M., Jin, Y., Wilson, D. B., & Bishop, D. L. (2018). Effects of an entertaining, culturally targeted narrative and an appealing expert interview on the colorectal screening intentions of African American women. *Journal of Community Psychology, 46*(7), 925–40. https://doi.org/10.1002/jcop.21983

Mayne, J. (2008). Contribution analysis: An approach to exploring cause and effect. BetterEvaluation. https://www.betterevaluation.org/en/plan/approach/contribution_analysis

Murphy, S. T., Frank, L. B., Chatterjee, J. S., & Baezconde-Gabanati, L. (2013). Narrative versus nonnarrative: The role of identification, transportation, and emotion in reducing health disparities. *Journal of Communication, 63,* 116-137. https://doi.org/10.1111/jcom.12007

Neimand, A. (2018). *How to tell stories about complex issues.* Stanford Social Innovation Review. https://ssir.org/articles/entry/how_to_tell_stories_about_complex_issues

Oschatz, C., Emde-Lachmund, K., & Klimmt, C. (2019). The persuasive effect of journalistic storytelling: Experiments on the portrayal of exemplars in the news. *Journalism & Mass Communication Quarterly, 00*(0), 1-21. https://doi.org/10.1177/1077699019850096

Saltmarshe, E. (2018). *Using story to change systems.* Stanford Social Innovation Review. https://ssir.org/articles/entry/using_story_to_change_systems

Slovic, P. (2007). “If I look at the mass I will never act”: Psychic numbing and genocide. *Judgment and Decision Making, 2*(2), 79-95.

Teles, S., & Schmitt, M. (2011). *The elusive craft of evaluating advocacy.* Stanford Social Innovation Review. https://ssir.org/articles/entry/the_elusive_craft_of_evaluating_advocacy#

van Wessel, M. (2018). Narrative assessment: A new approach to evaluation of advocacy for development. *Evaluation, 24*(4), 400–418. https://doi.org/10.1177/1356389018796021

Wilder Research. (2009). *Survey says: The role of surveys in your evaluation.* https://www.wilder.org/sites/default/files/imports/EvaluationSeriesTipsheet_2-09.pdf

Wilder Research. (2010). *Logic models: Better thinking for better results.* https://www.wilder.org/sites/default/files/imports/LogicModels_2-10.pdf

Wilder Research. (2011). *Effectively using qualitative data.* https://www.wilder.org/sites/default/files/imports/EvaluationSeriesTipsheet_3-11.pdf

Wilson-Grau, R. (2015). Outcome harvesting. BetterEvaluation. https://www.betterevaluation.org/en/plan/approach/outcome_harvesting

Wilson-Grau, R., & Britt, H. (2012). *Outcome harvesting*. USAID. https://usaidlearninglab.org/sites/default/files/resource/files/Outome%20Harvesting%20Brief%20FINAL%202012-05-2-1.pdf

Tools & resources

Logic model development:

What a logic model can do for you, Wilder Research, 2006

Logic models: Better thinking for better results, Wilder Research, 2010

How to build a logic model, Wilder Research, 2006

Logic model development guide, W.K. Kellogg Foundation, 2006

Survey development:

Survey says: The role of surveys in your evaluation, Wilder Research, 2006

Choosing the right questions, Wilder Research, 2006

Data analysis:

Analyzing quantitative data for evaluation, Centers for Disease Control and Prevention, 2018

Effectively using qualitative data, Wilder Research, 2011

The full literature review and field scan that were completed for Living Proof Advocacy:

Interested in what the evaluation research says about personal narrative storytelling for advocacy?

Evaluating personal narrative storytelling for advocacy, Wilder Research, 2019.

Interested in hearing from other storytelling advocacy organization’s work, and their experiences with evaluation?

Living Proof Advocacy field scan results, Wilder Research, 2019.

The authors would like to thank John Capecci and Tim Cage of Living Proof Advocacy for their partnership on this evaluation toolkit.

The following staff from Wilder Research contributed to this work:

Jenny Bohlke
Rachel Fields
Nicole MartinRogers
Kerry Walsh

Living PROOF advocacy

Wilder Research®
Information. Insight. Impact.
www.wilderresearch.org | 651.280.2700

Contact Emma Connell at Wilder Research with any questions or comments about this evaluation toolkit.

emma.connell@wilder.org

651-280-2717