Not just a story

Making use of experiences and stories in evaluation

A workbook

Evaluation Support Scotland

Contents

What this workbook is about

Collecting, analysing and reporting on people's experiences

As part of your everyday work, you hear about many people's experiences. You learn about what's important in their lives, as well as how they interact with and feel about your services.

The purpose of this workbook is to help you to think practically about how you collect, analyse and use this rich information.

It is based on our experience of helping organisations evaluate their work and draws heavily on two programmes in which we explored the use of story evidence and experiences: 'Everyone Has a Story'[1] and 'A Stitch in Time'[2].

This is an advanced workbook for people who have attended our **Let's Evaluate!** training programme or have a good understanding of how to set outcomes, identify indicators, design evaluation methods and analyse information to report on outcomes. If you need help in these areas first, please visit our website.

Outcomes

After completing this workbook, you will be able to:

- Explain why and how people's experiences and stories can be used in evaluation
- Understand the difference between experiences as raw data and how they might be presented
- Use simple methods to collect, record and analyse people's experiences
- Feel more confident about presenting experiences in different ways

1 ESS worked with the Corra Foundation's Partnership Drugs Initiative (PDI) on a programme to hear the voices, opinions and feelings of young people whose parents were in recovery from problem alcohol and other drug use.

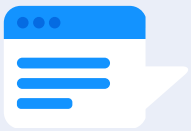
2 This programme was about the third sector contribution to care for older people and was funded by the Scottish Government. One strand of work was around 'making the most of lived experience' where we explored with a small group how to collect and use older people's stories.

How to use this workbook

This workbook is an editable electronic document that you can fill in, save, edit, share with your colleagues, and print.

You can use this workbook on your own, or you can use the questions and exercises to stimulate discussion with a group of colleagues.

Throughout the workbook, we refer to:



This symbol indicates a weblink to other relevant resources on the ESS website.

What we mean by experiences and stories

We are talking about people's first-hand accounts of what has happened to them and how they feel about that. We use the terms "experience" or "experiences and stories" throughout this workbook. You might also say "voices" or "feedback".

Experiences might be about:

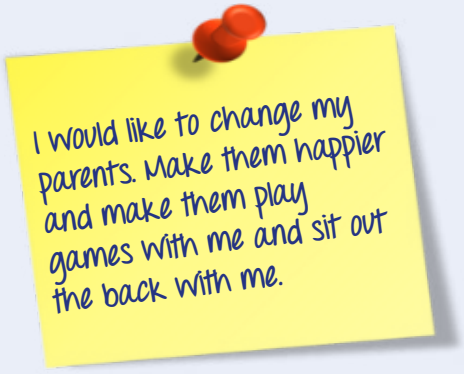
- Their life
- Your service
- Other services
- What works or matters to them
- The change or difference they see in themselves

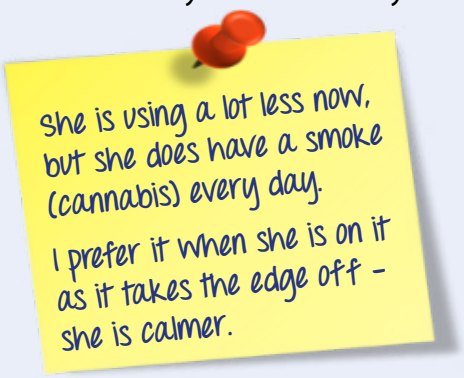
Experiences can take a variety of formats and they can be short or long. They can be an expression of feelings at a point in time, or a more detailed account of what has happened to an individual or a group over a period of time. See examples on the next page.

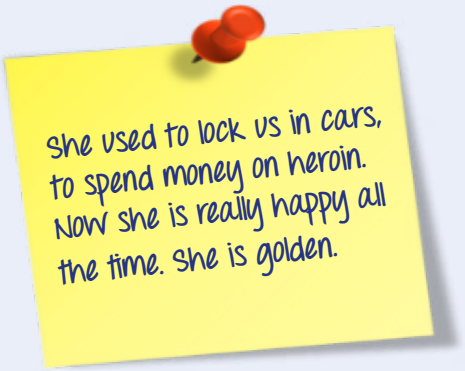
Mostly we are talking about the experiences of people who use your services, but staff and volunteers may also have stories and experiences to share about their work in your organisation.

Examples of experiences

A remark or comment: Examples from 'Everyone Has a Story'







Quotes collected through interviews: Examples from a community transport project

"I love the bus; I get to go everywhere. He's a very good driver; he's very safe so I don't feel at risk. I wouldn't go on the bus with just anyone."

"Billy (the driver) is great, he makes us all laugh. Never stops smiling and nothing is too difficult for him. We wouldn't get that from the taxi."

"I live in sheltered accommodation. Come to lunch every Tuesday and Thursday and also Friday for breakfast at 11am – the food is good here. I get a blether and a meal at the centre and meet old friends. It's an important part of my week."

An account of something that happened: from 'A Stitch in Time'

I'm a GP. I was visiting one of my older patients who couldn't manage into the surgery. When I arrived, I noticed that Mrs. Grey had 2 bulky jumpers on. A blanket lay on the chair, it had clearly been covering her knees. The house felt cold and I was chilly. I asked her why she didn't have the heating on. She said it was too expensive to have the heating on all day. She put the heating on in the morning for a couple of hours, then again at tea-time. This was mid-afternoon.

'Don't you get a winter heating allowance to help you with the bills?' I asked. She said, of course she did, but she liked to use that money to buy Christmas presents for her great nephews. She said 'I don't have a lot of money, but it gives me great pleasure to get them something nice. It really helps out my niece too and she's struggling'. I said she should think about her own needs, she needed to keep warm to keep well. She said *'their happiness keeps me warm. That and a few blankets, don't you worry about me'*.

I was shocked that she should put her great nephews before herself and her own health needs. But it's what she wanted and she wouldn't be persuaded.

‘Raw’ and ‘analysed’ data

The language we commonly use to talk about data is confusing and it is easy to get tied up in knots.

The important distinction when thinking about experiences is between ‘raw’ data and ‘analysed’ data.

In practice it’s not straightforward, because every time anyone tells a story they are putting a slant on it (they are analysing and presenting their experience for a different purpose and audience), and stories can be retold many times and subtly change.

Nevertheless for ease what we mean by an ‘experience’ is when **you** (as a worker) hear something for the first time (meaning it is ‘raw’ to you).

A case study is when you **retell** that story with a particular audience in mind to illustrate a particular point (for example highlighting what’s working, what outcomes are typically being achieved, what’s important to people about your approach, etc). Case studies can be used in reporting, marketing and/or training.

Experience or story

Raw evidence, captured as it is said.

Raw data is what you collect.

Case study

Analysed and cleaned up, told with a particular audience and purpose in mind.

Analysed data is what you report on.

Example of 'experience' versus 'case study'

Example of an experience
(from 'Everyone Has a Story')

One day I remember when Dad put the butter in the kettle, the coffee in the pan and the toast in the microwave. I was watching him and felt really worried about what he was doing. He was not making sense and I could not understand what he was saying. He then put the oven on at 200 degrees, sat down and watched the TV. He started to dribble out of his mouth and he fell asleep.

I had to clean up and make sure that he was ok. I switched off the oven. It felt quite good looking after him, but I didn't feel safe in the house.

Things are different now that he has started going to the doctor for help. He is trying to get better and stop taking heroin. I feel a bit confused now. My life has changed and I like having my Dad more normal, but I always worry that those days are going to happen again.

Same example written as a case study

Molly is aged 11. She lives with her father who is in recovery from heroin addiction.

Molly remembers when her father used to get confused. She is concerned in case he starts taking drugs again.

We have taken steps to assure her that we will continue to support her and her father and make sure she is safe.

How you might use experiences and stories

You can use experiences or stories in a range of ways. You can use them to help you:

Tailor a service to meet the needs of an individual
For example: you change the time, place, length or focus of a support session to fit in with the preferences of the service user.

Reflect on practice and personal development
For example: you share stories in support and supervision, at a team meeting, a reflective practice session or support and supervision. This can help you to reflect on what happened and whether lessons could be learned for others.

Review a particular aspect of your service
You might focus on a specific question, during which time you record comments and stories that shed light on the answers to that question.

For example: An organisation wanted to review how people accessed their services. In addition to analysing referral stats, they decided to ask a sample of people about their experiences of being referred and to note down relevant ad-hoc comments made by referral agencies and service users.

Report
For example to:

- illustrate outcomes: examples of how people have changed
- explain the process or journey: what people experience, when and why
- give a voice to service users: how people feel about their experiences and what is important to them

You might use quotes, examples, and/or case studies to help you present the themes that stand out from your analysis.

Train staff and volunteers
For example: an organisation analysed service users' experiences to identify what a 'typical' journey looked like for them. They developed fictional case studies for discussion in a training session, to highlight the kind of support that might be needed at different stages in a service user's journey through the service.

Market or publicise your service to potential volunteers and service users
For example: as part of a volunteer recruitment campaign, a project developed a poster with quotes from service users and volunteers about how they had benefitted from the service.

Reflection questions

What kinds of stories/experiences do you hear or collect? Use the examples on page 6 to prompt ideas.

Why is it important to hear and respond to people's experiences and stories?

What do you think the barriers and challenges might be?

How do you use people's experiences and stories in your work?

Why bother and what gets in the way?

Why it's important to hear and use people's experiences and stories

Every person is different, and you can't always assume that you know best. If you want effective services, you need to hear the experiences of people; their hopes, wishes and opinions about what should happen.

Listening is important because:

- That person feels heard and valued (sometimes listening is an intervention in its own right)
- It can help people to make sense of their own story and what's important/what works
- It challenges assumptions
- You can adapt individual support to achieve better outcomes (small changes can make a big difference)
- It gives people a voice and a chance to influence services
- It gives you ammunition for advocating on behalf of that person or group
- It helps you to improve your practice and the way you deliver services overall
- It gives better evidence of outcomes and why things work or don't
- Real stories and experiences bring communications to life

Quick Snapshot

In reality, it's not straightforward. Practitioners involved in 'Everyone Has a Story' reported:

'For those of us that have been involved in the action research directly, it has become very clear that listening to young people and really hearing them can be two very different things. At an event for professionals and experts we shared some of the captured experiences. The majority of people responded in 'process mode' i.e. how to fix the situation for the young person rather than hear what they were feeling or what the young person's opinion was of their situation.'

As workers we may need to stop and listen and reflect rather than immediately leaping to action.

The challenges

Third sector practitioners often identify the following as challenges:

- How to invite and hear true accounts
- Ethics around using stories
- Knowing what stories to record
- Worries that stories are not seen as robust evidence

How to invite and hear true accounts

This has two elements: creating situations where people feel able to share; and being able to listen well.

How comfortable do people feel in sharing their experiences?

People may be not used to being heard or, conversely, they may be tired of telling their story. You need to create the right context to encourage people to share their authentic experiences and stories and to trust you.

How well do we listen?

Active listening is key to hearing authentic stories. But that doesn't necessarily mean you do it well. We are all prone to selective hearing; hearing the stories that fit with our agenda.

This link from Lifecharity.org.uk takes you to a description of active listening.

Ethics

There are important ethical issues around how you collect and use people's experiences and stories. These include:

- Knowing how to spot and deal with the trauma or bad feelings raised by sharing their experiences
- Having procedures for referring people for further support or action
- Having sufficient transparency around what you record and why you are collecting stories
- Protecting people when you use their experiences and stories in reporting or case studies (discussing confidentiality, and helping them to be clear about the risks of sharing their story)
- Considering whose story is it: who decides the angle and tone. Remembering that people might want their experiences to be told in a positive light with a focus on assets rather than deficits.

Quick snapshot

In 'Everyone Has a Story', we found that worries about ethics initially stopped people from collecting stories:

'One of the reasons we don't make use of stories is that we get bogged down in the ethics. It's good to have a healthy anxiety, because we have a duty to protect and care the young people we work with. But that shouldn't stop us from using stories. That would be unethical!'

We found that workers were initially very reluctant to ask people for their stories, but in practice young people were happy and wanted to share them. In one case the young person noted:

'I even want the queen to know'!

On page 15 we ask you to consider how you apply ethical principles around data collection in your work.

Knowing what stories to record

People tell us about their experiences or stories all the time. As busy workers, you can't record everything. see 'Deciding what to record' on page 20.

Quick snapshot

Place-based or community workers hear lots of stories each day and it is difficult to know what to record. Keeping a simple diary or recording casual comments may help.

Not seen as 'robust' evidence

Sometimes stories are dismissed as 'anecdotal' evidence.

'Anecdotal evidence is a factual claim relying on personal observation, collected in a casual or non-systematic manner'
Wikipedia

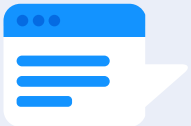
Critics may argue that it is difficult to determine how 'typical' an experience or story is: that people tend to remember notable or unusual examples; that stories often offer a 'curated' version of events; and that receivers of stories may have an unconscious bias, hearing what they want or expect to hear.

We accept that experiential evidence might need to be tested against other evidence.

A story on its own may not be enough evidence to make sweeping practice or policy changes. But it can tell you what matters to that person and in some cases how and why something works/doesn't work or is important.

Analysing a number of experiences or stories enables you to pick up themes and issues that you may not have thought about. It also provides you with examples that you can use to explain your work to others.

You can take steps to be more systematic in the way you collect, analyse and use experiences and stories. You can try to understand how typical that example is by using stats and stories together, to understand the stories behind the stats and the stats behind the stories.



See 'Stats and stories in community settings: a guide to blending different types of evidence in evaluation reports'

Reflection questions: ethics

Need:

Do you know why you are collecting experiences and stories?
How will it help you prove or improve your work?

Integrity:

Do you have consent to collect evaluation information?
How do you tell people about your findings and conclusions?

Accountability:

How do you involve people in planning your evaluation?
Are their choices clear? Can participants say no?

Confidentiality:

How do you ensure the confidentiality and anonymity of individuals?

Safety:

What steps do you take to ensure that service users or workers are supported with issues that arise from sharing their stories?

Collecting experiences and stories

This section focuses on

- Methods for collecting experiences and stories
- Deciding what to record and why
- How to record a story well

Reflection questions

Before we start, ask yourself:

When do you most often hear true accounts of people's experiences (of life, your services, the system)?

How do you encourage that?

What do you currently do with what you have heard?

Methods for collecting experiences and stories

Third sector workers told us that people were more likely to give true accounts of their experiences when there is a positive relationship with the worker and when they feel comfortable.

Often the best conversations take place when something else is happening, for example:

- You are sitting side by side in the car driving somewhere
- You are involved in an activity (baking, creatives arts, playing pool)
- You are arriving/leaving (before/after the formal work)

For many projects the conversation *is* the work; activities are created to encourage dialogue.

Quick snapshot

In 'Everyone Has a Story', workers identified that in supporting families:

'The more experienced you become the less you rely on methods and the more you create natural circumstances where informal and natural conversations can happen.'

'Tools are an opener or used to break the ice.'

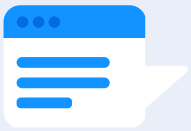
There are three types of approach to collecting experiences and stories (you may use a mixture of all three).

1. You record what you hear as part of everyday conversations with people.

   You might have a place for recording stories; for example, you might use a method such as Capturing Casual Comments, or keep a file or folder in which to save the things people have said.

   Or you might think about adapting your current way of recording. Perhaps you can make a space to record comments, quotes or stories in, for example, case notes, session records, your database. See Using case records for more information.
2. You include a space for more qualitative responses in **your existing evaluation methods**. For example, on a questionnaire you might ask a more open question and/or add a comments box rather than only having tick-boxes.
3. You might undertake **a more formal story-collection process**, collecting stories for a particular period or reason.

Collecting stories in a more purposeful manner encourages people to give richer feedback and invites them to connect with their emotions before telling you what is important to them.



See 'Learning from evaluation: what works in your third sector organisation' for the types of 'what works' questions that might help you in understanding people's experiences or stories.

See the ESS website for special methods for collecting experiences. Appreciative questions, Choosing pictures, Emotional touchpoints, Stretch or Positive statements, Relationship Map.

Reflection questions: ethics

Which of these approaches and methods might you use in your organisation?

How might you adapt them?

Deciding what to record

Given that you can't write down everything you hear, you have to make some choices over what to record and how. There are two factors to bear in mind:

- the emotion
- the purpose

Emotions

You might want to make a note of someone's experience or story because it is telling you that something is important. You can use this as a prompt for reflecting on your work, either on your own or in a group.

Experiences are closely tied to emotions. If someone expresses a strong emotion whilst they are telling you about their experience, it's a sign that something significant is surfacing for them – something that really matters to them. Similarly, if you have an emotional reaction when you see, read or hear something, you might want to reflect on what this tells you about your work and your practice.

See 'ESS Support Guide 4b: Reflective practice'
Reflective practice is thinking about or reflecting on what happened, what you did, and what you would do differently next time. It's about learning as you go along. In this support guide there are suggestions of tools to prompt your reflective practice.

Purpose

What you record might depend on how you think you're going to use it.

How you will use the information	Recording options
To change support given (or change approach for an individual person)	Don't record, just respond Put in case records if significant and relevant to that person's individual progress
To improve your practice	Record for support and supervision Record for personal development/training needs
To report on outcomes and what works or doesn't	Record on relevant evaluation forms/database so that it can be retrieved for analysis later.
To feed into a review of an aspect of the service	Record the conversation using a simple template or agreed format (see example below)
To feed into policy	Record using a template (see example below)

Reflection questions

What do you record and when?

Is there scope for collecting more experiences and stories?

What makes a well-recorded experience

A well-recorded experience or story:

- Is told in the first person
- Records the actual language used
- Represents that moment in time
- Doesn't need the whole back-story
- Focuses on what is said, not on rationalising or making sense of it
- Is honest and even messy (not tidied up)

Keeping these tips in mind allows you to capture the experience and feelings better, rather than putting your filter on that experience.

See the template for recording stories from 'Everyone Has a Story' on the next page. Feel free to adapt this to your own needs.

Be aware that you may not be sharing the whole of this story with others; depending on who you're sharing it with, you may anonymise it or take out quotes, but it is important to keep it whole at this stage.

Quick snapshot

[in 'Everyone Has a Story']

'We were concerned about confidentiality before because we didn't know how the stories were going to be presented. Now I've seen the way we are using stories I feel more relaxed because we can't tell who the story is from'.
Worker

Tips

- Record after the event – so that recording does not stop the flow
- Set a bit of context around the story – it's easy to forget the details
- Try including direct quotes
- Note how the words were said – with joy, sadness, etc.
- Ask the person their view of their experience and its significance to them
- Don't ignore your own emotional response

Suggested template for recording experiences or stories

Brief context:

Relevant background info about the person:

Nature of service:

When and where the person shared their experience or story:

How long you worked with this person for:

Any other key information about context:

The experience or story:

Checklist

1. The person shared their experience or story in a setting and way that felt comfortable, appropriate, and meaningful for them

Any issues:

2. Risks assessed and any follow-on support given

Any issues:

3. Consent given to share this story with (as appropriate)

- o Other professionals taking part in this learning programme
- o Other service users
- o A wider group of professionals and policy makers who are interested in this programme
- o A public document or website

4. Steps taken to ensure the confidentiality of the person

Analysing experiences and stories

Analysis is about making sense of the stories you collect, looking for themes and finding out what is typical and what is unusual. Both can tell you something important about what matters and works for people.

Sometimes it will be enough to analyse ad-hoc comments, quotes and shorter stories. Sometimes you will want to identify the 'journey' for different groups by analysing several stories. In all cases you will want to check your findings with the storytellers to make sure they reflect their experiences.

Below we look at four things:

- How to analyse an individual story
- How to identify themes across a number of stories
- How to identify different journeys
- Checking your findings

Analysing individual stories

On the next page is a simple framework for you (or a group) to analyse an individual story. You might want to do this to reflect upon what you are learning from your practice. You also might use it when you are analysing multiple stories, to ensure that you are being methodical in your approach.

We ask that you take this process slowly and answer each question in turn. Doing this acts as a brake on reaching conclusions and deciding on action too soon. It allows you to identify your own emotional reactions before you try to identify what matters to the person.

Sharing stories: guidance for groups

Please appoint a host, volunteers to read out a story and someone to make a few simple notes.

Part one: Storytelling

The host invites each volunteer to read/tell their story. They should be encouraged to take their time.

After each story, the host asks the listeners to give their initial response (10 seconds maximum) – what their gut reaction to the story was (prompt 1 on the framework).

Part two: Reflection on the stories

The host uses the remaining prompts (2 to 4)

Take it step by step; don't rush to conclusions or actions too quickly.

During both parts, the recorder makes notes of the key things they are learning.

A framework for analysing stories[1]

1. **Observe: What are we noticing?**
   What's your emotional response/what leaps out or is surprising to you?

2. **Reflect: What matters to that person?**
   What emotions are they feeling? What seems to be important to them?
   What do they seem to believe/want/find difficult?

   Who else is involved?
   Is there anything significant in their role?
   How is their role or support viewed by the storyteller?

3. **Plan: What's our part?**
   How well did we support that person? How do we know? Could we have done something differently to get a better result? Do we need to act on anything as a result?

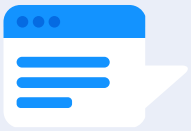
4. **Act: What's the conclusion?**
   Where are you now? Where is the person in their opinion? Who needs to hear this story?
   What needs to happen?

1 Building on a tool by © Research for Real, 2013. Adapted from Yolanda Wadsworth (2011) Building in research and evaluation: Human inquiry for living systems. Left Coast Press: CA, USA

Looking for themes across different stories

As with all qualitative analysis, you should be:

- Identifying themes and giving them a code or label
- Counting the codes to see how often the theme occurs
- Looking for relationships to other factors e.g. characteristics (age/gender), use of services, past experience, address, etc.
- Looking for stories that confirm or challenge this theme



See 'Making Sense: analysing qualitative information' for more detailed guidance and examples around qualitative analysis.

Identifying different journeys

You might want to compare or highlight the experiences or stories of different people, for example:

- older and younger people
- people with different needs
- people with better and worse outcomes from your support
- people with complaints versus those who are very satisfied with your service
- people involved in a particular incident or over a particular period of time

Falling somewhere between collecting, analysing and presenting experiences, comparing different journeys involves:

- identifying the groups or individuals (analyse your stats to look for important differences, or follow a hunch)
- curating facts and small stories into a story over time. This might be for an individual, or for a group (describe the person, group or incident, create a timeline of what happened when, and include the person's views and feelings at different points)
- identifying important differences or factors that seem important

Reflection questions

Why might you like to focus on the stories of particular individuals, group, incidences or periods of time?

How might you use existing data to build the story?

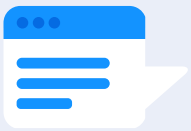
How might you involve other people?

Checking your findings

You might want to check your findings with both the people you support and others (staff and volunteers). You might find that people pick up different issues or come to different conclusions.

Experiences or stories are one form of evidence. You might want to check how what people say matches with other evidence. For example, young people might say they 'don't care' about an activity but keep turning up or behave in other ways that suggest they do care.

But be pragmatic: ask yourself if the evidence is clear enough and good enough. Be transparent about any gaps in your evidence. If the analysis raises further questions, then say so.



See the following guides on the ESS website:

'Stats and stories in community settings: a guide to blending different types of evidence in evaluation reports'

'How good is my evidence?: a guide to assessing the quality of evaluation evidence'

'Why bother involving people in evaluation? Beyond feedback'

Reflection questions: Thinking about analysis

How good are you at listening to people, rather than jumping to conclusions?

How could you involve people in checking your conclusions?

What other data could you look at to make sense of and check your findings?

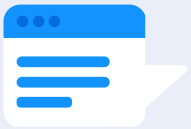
Presenting experiences and stories

How you present experiences or stories depends upon the audience, purpose, key messages, and format. Here are some things to think about:

Who (audience)	**Why (purpose)**
For example • funder • potential volunteer • service user • policy maker	For example • Education/training method • Marketing • To illustrate outcomes: examples • To explain the process or journey • To give a voice to service users
What (key messages)	**How (format)**
For example • We need your support • We can help • We make a big difference • There are some challenges for this group • This community has a lot to offer	For example • Poster • Examples in report • Example on website • Example in presentation • Social media

Common ways to present your information include case studies, brief examples, quotes, or identifying themes coming from the analysis. See below for examples of these.

You can also use different and creative ways of presenting experiences and stories including graphics, diagrams, key words and pictures. Of course, you can combine these.



See 'ESS Support Guide 3.2 – Writing case studies'

A case study

Telling the story of an individual, group or incident/period of time. These do not have to be long or detailed.

Example:

Being young in Anytown isn't always easy. Jess left school at 14 and became homeless at 16. Now 20, she dreams of one day helping other young people have better lives.

She knows volunteering will help her get the skills and confidence she needs but finds it hard to stay motivated.

Our support workers have worked hard to engage Jess over the last 12 months. We've adapted our appointment system and begun drop-ins to make things easier for people like Jess.

"It's amazing to have people who believe in me, even when I don't believe in myself."

Brief examples (eg in an outcome report)

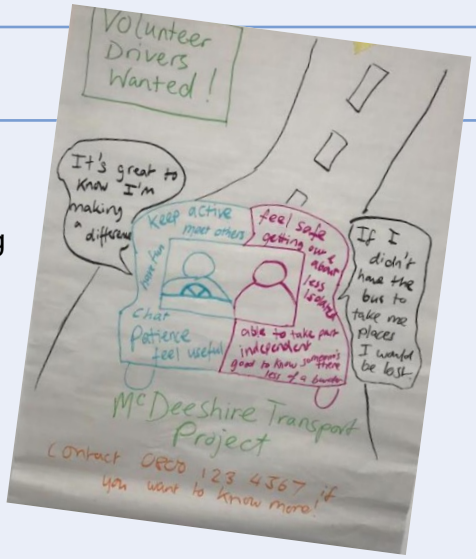
12 out of 15 families we worked with increased their parenting skills

- Ellie is now getting to school on time
- Bobby says there are fewer arguments at home
- Javade says they're having regular meals and at set bedtime

Quotes

Example:

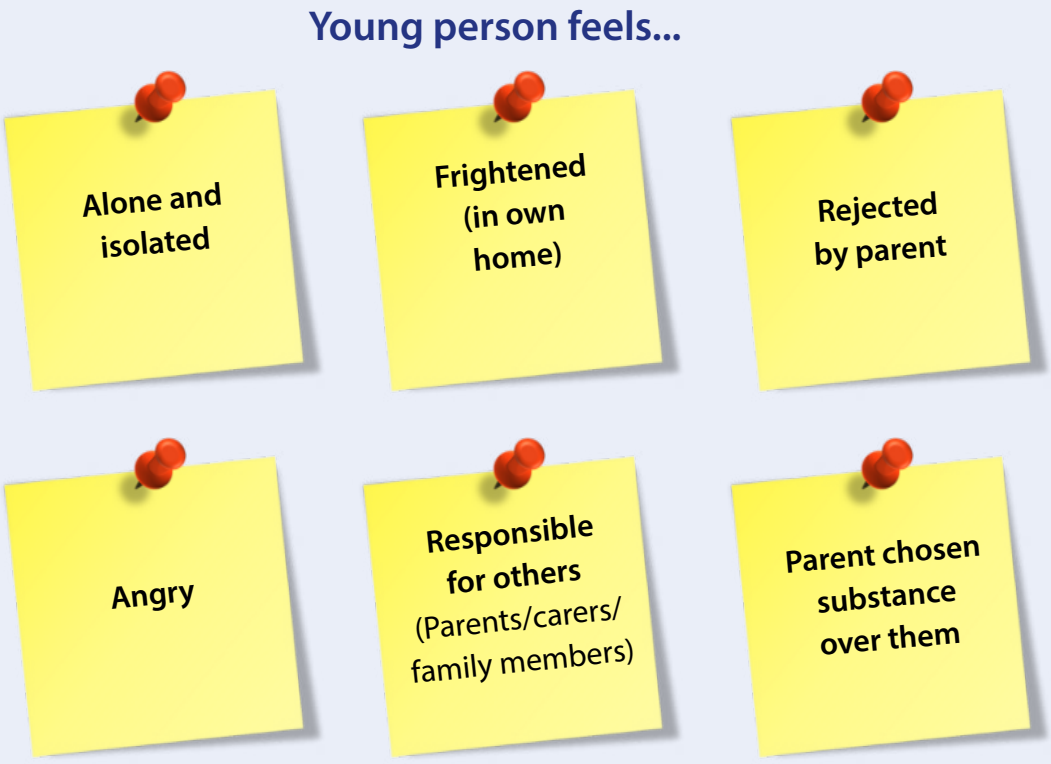
A mock-up of a poster for attracting volunteers and service users



Presentation of themes

Example 1: a word cloud to present key themes coming from feedback for a play project

Example 2: post-it note analysis of themes coming from young people experiencing recovery from drugs and alcohol



Reflection questions

Look at the examples of presenting experiences and stories on the previous pages:

What's your opinion; what do you like/dislike?

What kind of presentation would work for your organisation?

How could you improve your communications?

Using experiences: how well are you doing?

In this last section we ask you to mark where you think your organisation is in relation to a number of statements. Then reflect and/or discuss what you want to do next.

We are ready to hear

Statement	We do this well	We are ok	We could do better	Not applicable
We really listen to the people who use our services				
We create situations where people can talk honestly to us				
We have protocols in place to ensure we use experiences and stories ethically				

We record and analyse experiences

Statement	We do this well	We are ok	We could do better	Not applicable
We know what types of experiences and stories to record and how				
We share and analyse the experiences and stories we hear				

We use the learning

Statement	We do this well	We are ok	We could do better	Not applicable
We change individual support to reflect what's important to that person				
We use experiences and story evidence to influence policy				
We use experiences and stories to reflect upon our own practice				
We use experiences and story evidence in service planning				
We use experiences and story evidence in understanding and reporting on our impact				

Final reflection questions

Given your answers to the above questions:

What needs to change?

How can you make it happen?

Contact us for more information about this guide or how Evaluation Support Scotland could support your organisation.

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