

OUR VOICES HAVE POWER: A Storybanking Guide

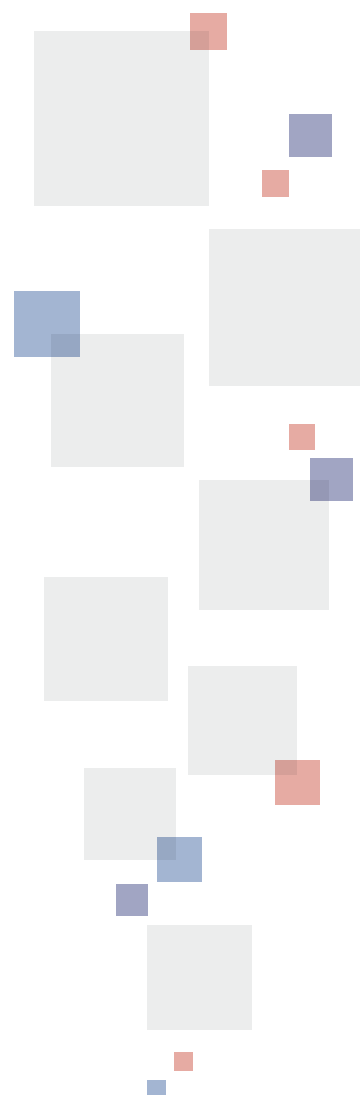


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INTRODUCTION

Advocacy is about people. At its simplest, advocacy is about how we change people's lives through projecting and amplifying the power of their voices. Often, the success of an advocacy effort depends on how consistently and powerfully the people who are poised to act hear the voices of those their actions will affect.

One of best ways to raise people's voices is to empower them to tell their own stories and to bring these stories to those making critical public policy decisions. As consumer advocates, we focus on bringing the voices of consumers to the places where decisions are made – in community forums, hospital feedback sessions, legislative hearing rooms, on the floors of state capitols, in the media, on social networks and in Washington, D.C.

During initial passage of the Affordable Care Act, stories played a key role in putting a human face on the health care debate and demonstrating to policymakers what was at stake – and how their decisions would impact the everyday lives of their constituents. Storybanking at this early stage focused on coverage and access issues – how coverage was limited, unaffordable, or unavailable to tens of millions of people. After passage and during implementation, storybanking became much more diverse, covering a variety of topic areas across the health care spectrum.

Following the 2016 election, everything we have worked for – and everything that those storytellers valued – is at risk. Congressional Republicans and the Trump administration are rushing to undo years of progress by attacking the Affordable Care Act, Medicaid and Medicare. We can't afford to go backwards – and personal stories remain a powerful way to fight back.

For the young people who now have coverage as they take the next step in their journey to adulthood, the new parents who have access to care for their newborns, the cancer patients who no longer have to worry about the label of a "preexisting condition," and the low-wage workers who can maintain coverage for the first time in their lives, stories matter. It's how we learn. It's how we describe our experiences. And for our nation's health, personal stories are one of the few tactics that will cut through the noise and complexity of health policy debates.



BEST PRACTICES FOR STORY COLLECTION

Successful storybanking requires strong relationships, diligent follow-up and trust between all those involved. This toolkit shares some best practices for building buy-in from multiple sources, but particularly from your partners and from health care consumers themselves, who often have the most influential and powerful stories to share.

Build buy-in with your partners

Storybanking takes time and patience. Though it requires you and your partners to devote significant resources and staff time, it can sometimes be difficult to measure the impact of personal stories on your overall advocacy efforts. It is also important to recognize that it requires a meaningful commitment of resources to maintain an up-to-date storybank, as contact information and the relevance of particular consumers' stories may cycle in and out of play depending on current events. It is important to build trust, consensus among staff and coalitions, and a shared vision of how consumer stories will help you build power and create policy change. Strong story collection partners can include organizations aligned with your coalition or advocacy priorities, community organizers, human service providers, enrollment assisters and other community partners like faith leaders, local elected officials, small business owners, health care providers, and community-based organizations that support communities of color and other constituencies facing health disparities.

Here are a few strategies to build buy-in with your story collection partners:

- ✓ **Be clear about why you are asking your partners to help you identify stories.** Discuss how you see personal stories as valuable resources for achieving your shared advocacy goals. Consider: What experiences are you trying to capture? What communities are you trying to highlight in your story collection efforts? Who are you trying to influence by sharing someone's story? And remember, consumer stories not only humanize a complex policy area, but they can also help inform and refine your and your partners' advocacy priorities as you learn more about what consumers are experiencing on the ground. Be sure to take the time to listen authentically to – and

ideally incorporate – your partners’ reasons for engaging in story collection, as well. For example, if you are working with a community-based health center that serves a particular identity group, find out the organization’s particular interest in engaging in the story collection effort, and make sure to incorporate its needs – and desired outcomes – into the effort.

- ✓ **Meet with your partners in person.** Take time to meet with your partners at their offices to discuss why story collection is important, walk through how to identify and collect stories, and answer questions. Visiting your partners on their turf is a great way to build strong relationships and ensure that the process will be manageable and smooth for them.
- ✓ **Empower your partners to collect stories.** Your partners may be better suited to collect stories since they likely have already built strong relationships and trust with people in their communities. Work with your partners to develop tools and resources that will best fit the communities they serve, such as intake forms, interview scripts and fact sheets for your current campaign. You will also want to provide sample consent forms. Ensure that all materials are translated into all languages used by your partners’ constituencies. If your partners are collecting stories from consumers who speak a language other than English, determine if they can arrange for an interpreter at the time of collection, or if they can gather the story by audio or video recording, or in written form, and have it translated later, recognizing that translation services are labor- and sometimes, cost-intensive.

Take time to develop a process for how stories will be shared between you and your partners, and be clear that every participating consumer will go through a vetting process and that not all stories that are collected will necessarily be used. It is also important to share with your partners how vetted stories could be used by your organization – for example, through social media, advocacy materials, legislative reports, etc. With permission, credit the organization that you received the story from so that your partners have an opportunity to publicize their organization’s work and contributions.

- ✓ **Make referrals as easy as possible.** If your partners do not have adequate staff or other resources to undertake collecting stories on their own, it’s helpful to develop a clear and simple referral process so that they can, instead, refer consumers to your organization where you can collect their stories. Provide your partners with postcards, brochures, a dedicated phone number and/or online web forms that consumers can fill out with their contact information and a brief description of the experience they wish to share. Before relying exclusively on web-based forms, consider whether folks in the population you are contacting are likely to have regular computer or internet access. In some instances, organizations utilized tablet computers during in-person story collection opportunities to quickly and efficiently capture one’s story. Make it easy for your partners to share all information collected with you, and establish a clear process on how you



Photo credit: Alabama Children First

plan to follow up with each consumer who has made the effort to reply. It's important to remember to follow up with your partners in a timely way, as well, so they can also hear about the impact of sharing their constituents' stories.

Build trust with consumers

Not every person you connect with will be experienced in sharing their story publicly or interacting with the media or policymakers. Empower consumers to feel in control of their own story throughout the entire process and provide a clear understanding of how their story will be used over time.

Here are a few key strategies to build trust while respecting the confidentiality of consumers:

- ✓ **Listen.** As a story collector, you may be an outlet for a consumer to talk about sensitive experiences that they might otherwise be hesitant to discuss. Make active listening a fully focused activity. Ask questions respectfully and provide a safe and confidential space for them to share what they are going through. Try to avoid diving into the politics of an issue that could create tension or distrust between you and the consumer.
- ✓ **Speak their language.** Sharing one's story is a deeply personal experience. To ensure a consumer's comfort, and to guarantee that as little as possible is lost in translation, it is important to meet a consumer where they are in terms of language. Be sure to identify an interviewer who speaks the same language, or take along a translator or interpreter.
- ✓ **Emphasize why personal stories are important.** When talking to people about sharing their stories, remember to describe your organization in plain language and the reason you are collecting stories. Let the person know that their unique story has the power to educate the public, help change policy and give voice to many others who are in a similar situation. Provide them with relevant information and opportunities to get involved in your campaign.

Stories can and will be used to influence decision makers at all levels of government. A good story at the federal or state-level may be much different than one that is influential at the grassroots level with individual hospitals, providers or local elected officials. Everyone's voice matters.



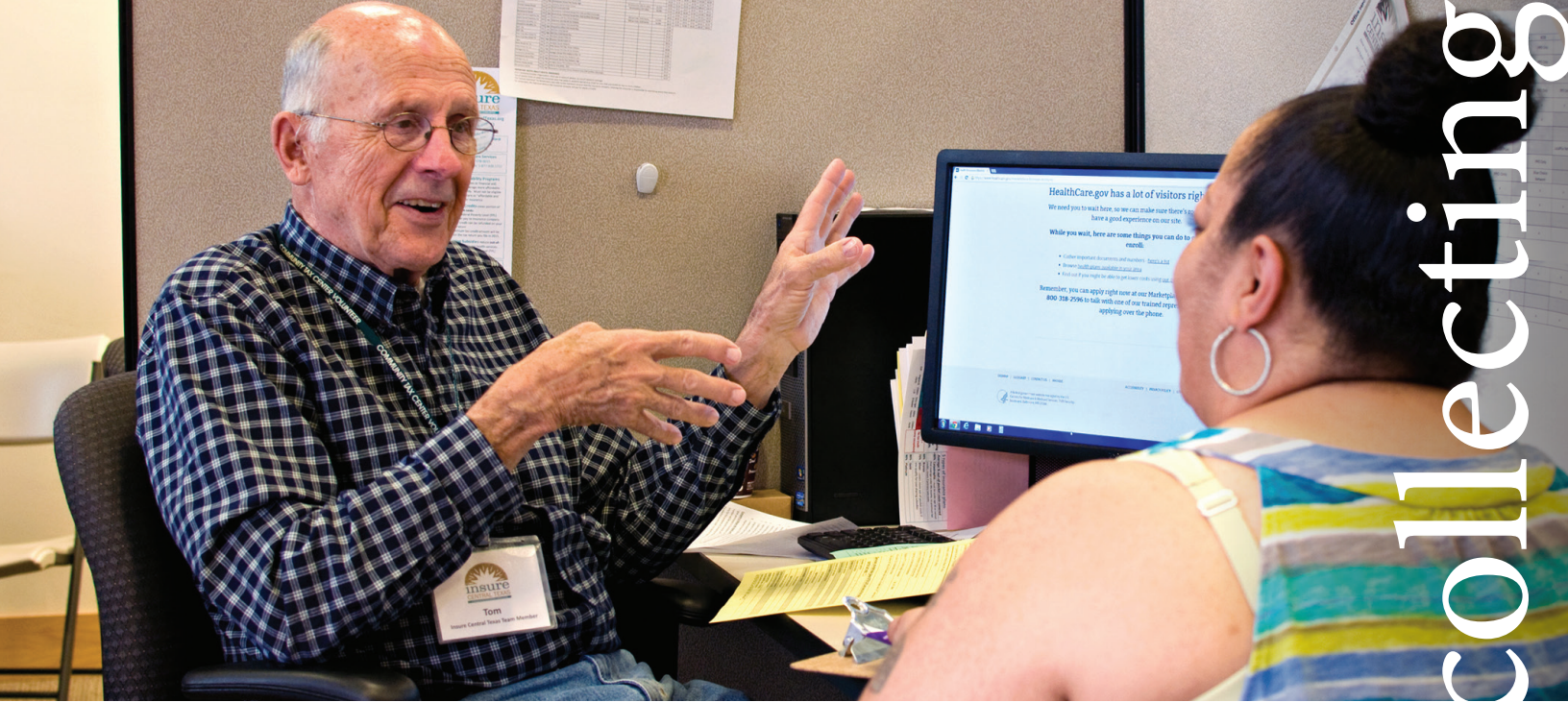
Photo credit: Alex Kent, Tennessee Justice Center

- ✓ **Ask the consumer when and how they want their story to be shared.** A personal story can be shared in a wide variety of ways. Find out what the person is most comfortable sharing and how they'd like it to be shared (video, talk to press, just a picture). There are many different ways someone can share their story – they're all powerful. Don't miss out on someone just because they may not want to speak to the media; if a consumer is not comfortable using their real name, offer them the option of using a pseudonym so their personal information stays confidential but their story is still able to be shared widely.

Additionally, it is always a good idea to ask permission from a consumer each time you share their story, especially if it's different than what you first discussed with them. For example, if you're sharing a consumer's photograph and quote on Facebook but you'd like to also include their story in literature to an elected official, it's best to seek to their permission before moving forward.

Because different aspects of stories may be more influential at various points of time or as circumstances change, it's important to gather as much information up front to factor changing dynamics into the story collection process.

- ✓ **Always provide a consent form.** Be sure to know the privacy laws in your state and be prepared to create a consent form. A consent form is a great way to build trust with the person and to give them a clear understanding of what to expect from sharing. Again, be sure that consent forms are available in a speaker's primary language.
- ✓ **Be clear of your intentions and provide assistance when you can.** It is very important to make your intentions clear to people (both partner organizations and the consumers, themselves) as you're gathering stories, especially if someone reaches out to you for help. Let them know that you cannot offer direct services (unless, of course, that is your mission), but you can and should do your best to connect consumers to services or other organizations that can help them like free clinics, legal aid, ombudsman programs or other health care services they might qualify for. Make sure that consumers sharing their stories don't have an underlying assumption that by publicly expressing their needs, they are guaranteed to have them addressed.
- ✓ **Keep in touch.** After you have collected a person's story, stay in touch with them. Follow up by phone periodically, ask them how they are doing, provide them with updates on your campaign and fold them into your broader advocacy work if they are interested in getting involved. And remember, assure the person that you will not release their story or contact information without prior consent each time.



GATHERING YOUR STORIES: ACTIVE AND PASSIVE COLLECTION STRATEGIES

An effective storybanking operation includes utilizing both active and passive story collection strategies. Active story collection involves person-to-person interaction and building strong relationships with partners in the community, while passive collection strategies provide people an outlet to share their story indirectly, by such methods as through a telephone hotline, response postcard or web form. This section provides tips, strategies and examples to help you find and collect stories that best align with your advocacy goals.

Active story collection strategies

Develop strong relationships with diverse partners

One of the most effective ways to build your storybanking infrastructure is to cultivate strong relationships with your advocacy partners and to explore opportunities to collaborate with new and diverse groups, including those who may not seem like an immediate fit for your issue. Work with your existing partners to discuss the need for collecting stories, and think critically about whether your current partners and story collection efforts reflect the demographics of the communities you are trying to serve. For example, if the community you want to reach is predominantly Latino, consider incorporating materials in Spanish, or if you serve low-income neighborhoods, be sure your storybank includes working families. Here are a few relationship-building strategies to consider as you seek to strengthen your storybank:

- ✓ **Partner with enrollers or organizations that support enrollment efforts.** Enrollment assisters have been a great source for gathering stories. They are on the front lines of contact with consumers and can help you identify and share success stories of people who have gained coverage and benefited from the Affordable Care Act and the insurance marketplace. While there remains a great deal of uncertainty regarding future open enrollment periods, current and former enrollment

assisters can also help you connect with consumers who already have faced challenges while signing up for or utilizing their health insurance. In case enrollers express concern about protecting consumer confidentiality, here is a resource to help assuage those concerns.

CSSNY has an [online story submission form](#) that enrollers can use on the spot to plug in stories:

✓ **Collaborate with Community Health Centers.** In the current political climate, Community Health Centers (CHCs) are even more engaged than in years past in protecting their clients' high-quality, affordable health care. They are a trusted health care resource in many local communities, and they often provide care to low-income working families, low-income people of color, and consumers who may not otherwise have health insurance. Additionally, many CHCs are deeply committed to engaging in advocacy work, and there are strong opportunities to partner with CHC staff and patients on shared health reform initiatives, including collaboration around sharing consumer stories. As you build partnerships with CHCs, work with their staff to establish a streamlined process for collecting stories that respects both patient privacy and confidentiality, and the time-sensitivity often associated with story collection campaigns.

✓ **Partner with organizations that represent diverse and vulnerable communities.** The individuals and families in your storybank should reflect the communities you serve and those who are or will be impacted by the issues you are trying to address. In Rhode Island advocates at the Rhode Island Organizing Project were able to connect with low-income dually eligible older adults to video interview them by collaborating with Resident Service Coordinators in subsidized senior housing facilities.

Photo credit: Community Service Society of New York

- ✓ **Build your network.** Reach out to organizations, clubs, community groups and other networks where people are already meeting or seeking help. Many of these groups work closely with people who have stories to share about their health care.



As noted before, you will want to establish an agreed-upon process for connecting with people and collecting stories that respect a consumer's or patient's privacy and confidentiality, especially if you're connecting with providers or provider organizations.

✓ **Connect with community leaders.** Local elected officials, faith leaders, small business owners, law enforcement, university or college leaders, hospital executives and other influential community members can help you build new partnerships. These individuals can introduce you to other key “grasstops” leaders or organizations that serve the individuals and communities you are trying to reach. Keep in mind that not all community leaders will actively and publicly participate in your campaign, but they can help you connect with key groups on the ground. Advocates at the North Carolina Justice Center developed a relationship with a local Town Manager who helped connect them to nearby faith groups interested in learning more about health care issues affecting their community members.

✓ **Support your partners financially.** If possible, provide your partners with financial support so they have sufficient resources to take an active role in your coalition and to cultivate their members as advocates, as well. Collecting stories can be arduous work, so any additional resources you are able to provide to your partners will have a significant impact on their ability to do outreach, vet and share stories.

✓ **Look to your own coalition partners.** Many smaller non-profits have staff with their own personal or family members' stories to share about seeking coverage, facing denials or discrimination, or needing particular types of consumer assistance. More specifically, many smaller non-profits may not have the means to provide their own employees with health insurance, meaning that they may be on the Marketplace, opening up a direct line for consumer feedback.

New Jersey Citizen Action provided subgrants to five partners (Statewide Parent Advocacy Network Inc., Garden State Equality, Boat People SOS, National Council on Alcoholism and Drug Dependence NJ, Camden Churches for Organized People) both to ensure that their outreach and enrollment materials were culturally competent, and also to collect success stories of the Affordable Care Act from consumers in targeted communities.

Similarly, Maryland Citizens' Health Initiative provided a sub-grant to their partners at HealthCare Access Maryland (HCAM) to collect stories from consumers enrolling in the state marketplace and to offer a training for other regional enrolling entities on storybanking. Connector entities that completed the training and hosted local media events featuring success stories were then offered a stipend to help with their story collection. The stories these groups helped to gather were then used in radio and other advertising media to promote enrollment statewide in the Maryland Health Connection.

Meet people where they are

Advocates know that it is important to meet consumers where they are, and that gathering stories from trusted resources and stakeholders works best. This may include visiting local neighborhoods or workplaces, for example. Bring story collection forms to all of the events that you attend so you can capture a consumer's contact information and later screen stories to determine which ones to explore. If you get a lead on a potential story, have a process in place to follow up as quickly as you can. Meeting people where they are also means speaking to communities in their own language. When operating in a community with a population of non-English speakers, it's important to have story collection materials in the language the community speaks. Interpreters or translation services may be considered here, as well.

It is also worth noting that when approaching people, it is important for story collectors to have some form of "credentialing" to help establish trust, such as mentioning a community organization or leader they recognize or sharing a business card plus additional information about the project you're working on.

Here are a few suggestions of where you can connect with consumers who may have a story to tell:

- ✓ **Health insurance enrollment events.** Enrollment events have traditionally been a great place to connect and talk with consumers about their health care coverage, especially as they usually occur in accessible locations within communities, such as school gymnasiums, community health centers, or venues for large events like concerts, job fairs, etc.
- ✓ **Community events.** In addition to attending enrollment events, think about other settings where you can reach consumers going about their daily lives, these can include farmers' markets, county or state fairs, faith-based festivals, recovery rallies, job fairs, parades and cultural events.
- ✓ **Door-to-door canvassing.** If your organization or one of your coalition partners does door-to-door outreach, add a few bullets about story collection in a canvasser's script. Make sure to have a streamlined process to collect stories – or contact information for consumers interested in sharing their stories – so that timely follow-up and outreach to those contacted can occur. Additionally, make sure canvassers get a correct email address and phone number from those they meet, as door-to-door outreach lists may need to be updated for accuracy.

Advocates from the Pennsylvania Health Access Network partnered with a local recovery group to have a story booth at their recovery walk. Organizers had a table and asked individuals a series of questions about their experience with the health system. Consumers could fill out a story-sharing form on the spot and even share their story as a quick video.



"Seeing a doctor I could trust led to getting treatment for depression and, later, alcohol abuse."

**-Dane
Philadelphia, PA**

Photo credit: Alex Kent, Tennessee Justice Center

- ✓ **Local forums and meetings.** Attend or organize local forums to discuss important health care issues and update community members on your advocacy work. These gatherings offer excellent opportunities for you to connect with people who care about or are affected by the issues you're trying to address. Advocates in North Carolina organized a meeting with a local church congregation where they invited Navigators to attend and sign up members for coverage and brought state experts to speak about pressing health care issues in the state. During this meeting, a number of church members shared their experiences with the health care system, and advocates were able to capture their stories and get them involved in their advocacy efforts.

Passive story collection strategies

We know that your organization can't be proactive 24 hours a day in building and maintaining your storybank, but thankfully there are mechanisms and materials that can be set up to collect stories when it is convenient for consumers to share them. These include:

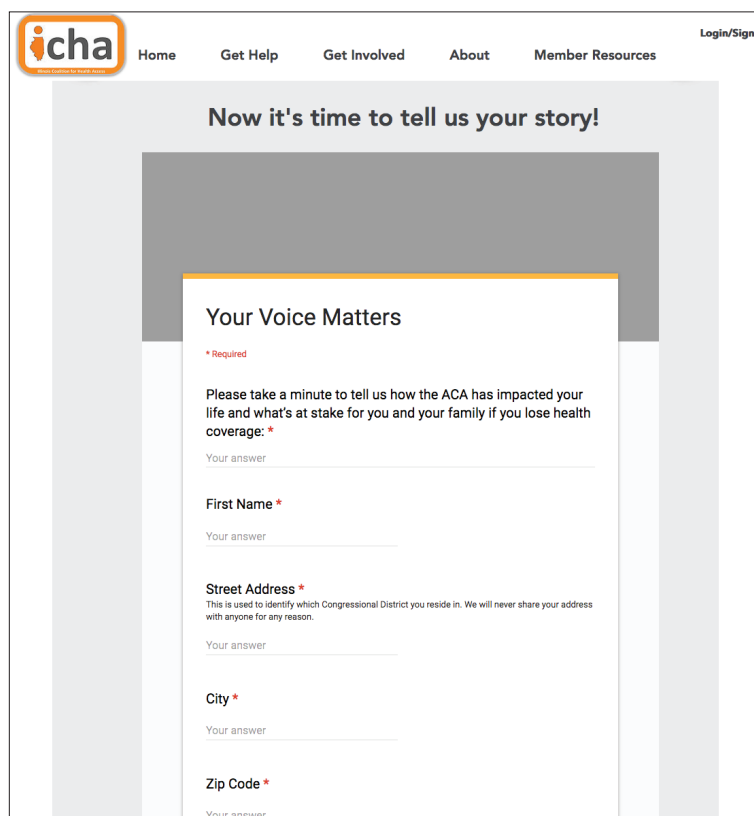
- ✓ **Dedicated phone line.** Promoting a phone number is a great way to connect consumers with a story-collection environment on their own time. You can use a phone number to collect voicemails or if you have the volunteer or staff capacity, there can be someone answering the phone during office hours. Interns or volunteers can be responsible for transcribing stories left on the voicemail or following up with consumers who have called to verify contact information and gather any necessary additional details of the story. Make sure to leave a clear, detailed outgoing message on the voice mailbox to ensure those leaving a message include all necessary information, such as name, phone number, and any specific details your campaign needs for an effective story.

We have found that using a dedicated phone line has been a successful approach for a few reasons:

- Consumers are more likely to leave a voicemail or speak on the phone with someone than put their story or information into writing.
- Depending on your issue and your state, consumers might not have easy access to the internet, whereas many more people have access to a phone.
- Follow-up is always necessary and web forms rarely capture the full story. Voicemails or live calls provide a stronger connection for your follow-up work.

During their campaign to close the Medicaid coverage gap in Tennessee, advocates at the Tennessee Justice Center staffed a story collection hotline with volunteer nurses who were able to conduct story collection as well as refer callers to appropriate services.

- ✓ **Online web forms.** Having an online form that's easy to find or link to on your website or promoting a phone number are great ways to connect consumers with a story collection environment on their own time. It's important to make the web form easy to find and to promote it on social media and in your e-communications with consumers.

The image is a screenshot of a web form titled "Your Voice Matters" on the iCHA website. The website header includes the iCHA logo and navigation links: Home, Get Help, Get Involved, About, Member Resources, and a Login/Sign link. The main heading on the page is "Now it's time to tell us your story!". The form itself is titled "Your Voice Matters" and includes a red asterisk indicating required fields. The text inside the form reads: "Please take a minute to tell us how the ACA has impacted your life and what's at stake for you and your family if you lose health coverage: *". Below this is a text input field labeled "Your answer". The form then asks for "First Name *", "Street Address *", "City *", and "Zip Code *", each with a corresponding text input field. A small note under "Street Address" states: "This is used to identify which Congressional District you reside in. We will never share your address with anyone for any reason." The form is set against a light gray background with a darker gray header area.

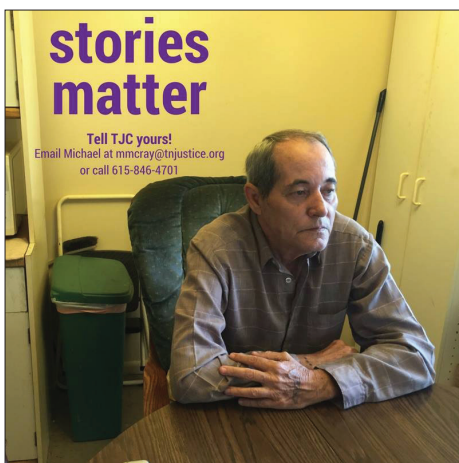
*IL Coalition for Health Access
and Protect Our Care IL*

Once the hotline or website is established, the work of reaching out to consumers to share their stories can begin through various outlets.

- ✓ **Social Media.** Capitalizing on the following your organization has built through its social media sites, promote your story-collection web form or phone number. Facebook ads are a relatively cheap avenue, as you only pay for the impressions made and you have control of a wide selection of variables to ensure your ad is reaching the right people. For instance, advocates from Utah Health Policy Project looked at economic data about which industries consumers without health insurance were typically employed in and then targeted their ad at profiles containing those fields. They also targeted people working in the health care industry who may encounter patients caught in the coverage gap. The ad typically contained language encouraging consumers to “share their story” or asking if they’d been “left out” of health insurance coverage. Again, consider creating digital ads in languages other than English where appropriate.

You should also ask all your coalition partners to share and promote social media posts advertising your storybank to reach the broadest possible audience. You can capitalize on opportunities to promote your storybank whenever you come across a relevant news article related to the issue you're storybanking about, either by sharing the article with your audience or even looking at the comments on the article to identify a potential storyteller. Often, the comments section under an article includes consumers who, by definition, are already willing to share their story in a public forum.

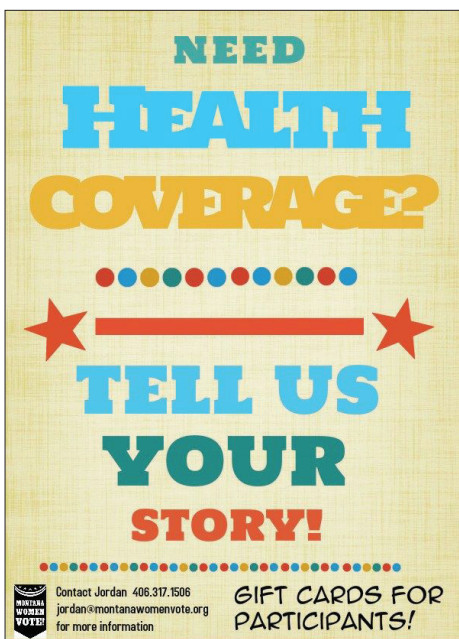
- ✓ **Online Ads.** Online ads, when targeted well, can be another cheap and effective way to reach target populations. Many local news outlets send out regular newsletters or emails to their lists, or sell advertising space on their websites. These provide a great opportunity for reaching a specific geographic audience you could be hoping to get stories from, as well as a way to target local policymakers.



Alex Kent, Tennessee Justice Center



Children's Defense Fund – Texas



Montana Women Vote



Pennsylvania Health Access Network

- ✓ **PSAs.** Radio ads are still an effective targeting tool for campaigns. Radio is a great – and often times more affordable – way to target rural populations who you may otherwise be having a tough time reaching. As part of the advertisement, be sure to include a story collection website that consumers can then access to share their own story.

For radio spots, consider that different times of day attract different audiences; for example, certain times of the mornings or evenings (drive time) would be a great way to target commuters; during the day may be a good time to target older adults; and late night may be a time to reach second- or third-shift workers. Advertising on religious or non-English radio stations will help you target people of faith or members of particular ethnic group.

- ✓ **Fliers/Palm Card.** Consider leaving your fliers or palm cards in areas that serve your affected populations. These could be community health centers, hospitals, community centers or anywhere your affected consumers may frequent. You should also capitalize on various community events and find ways to leave your fliers at farmers' markets, fairs and community picnics, to name a few. Consider seeking permission from event organizers prior to showing up to community events.

Following up and conducting the interview

We've outlined a handful of active and passive story collection strategies to help you find consumers who have powerful stories to share about their health care. Now it's time to interview them and find out more about their experiences. Here are a few tips to help you follow up and conduct an effective interview with a consumer:

- ✓ **Always follow up.** Regardless of whether a story comes from an online web form, phone line or from a partner who collected a person's contact information at an event, you should always follow up. People will often share more of their story with you when you connect with them in a more personal, deliberate way. Schedule a time to meet with the person face-to-face or over the phone depending on what is more convenient and comfortable for them.
- ✓ **Designate key staff to follow up and conduct interviews.** If possible, designate one or two staff members in your organization as the primary storybank point person(s). This will help streamline your story-collection processes and ensure that your communications with consumers are timely and consistent.

Advocates at the Tennessee Justice Center send a packet through the mail to every consumer who provides their contact information and expresses interest in sharing their story.

The packet includes a consent form with a stamped return envelope, talking points about the organization's campaign and how a consumer can advocate with their elected officials, an application for prescription drug discounts and a handful of flyers that can be posted around their community if they'd like to help spread the word.

- ✓ **Provide a consent form.** Consent forms allow you and a consumer to understand what parts of her or his story you have permission to share, and they're critical to building trust with the individuals you're connecting with. Here are examples of a photo and video release form, as well as a more general privacy release form. For additional tips and suggestions on building trust with consumers, please see [Best Practices for Building Trust with Consumers](#).
- ✓ **Explain why you are interested in hearing and collecting their story.** It's helpful to begin your conversations with an introduction to your organization, an explanation of your campaign and why you are collecting stories from individuals in the community. Be sure to emphasize the important role that their unique personal story can play in impacting policy change and giving voice to those who are in a similar situation.
- ✓ **Acknowledge the challenges.** Recent political dynamics have created a lot of uncertainty for consumers and their families. As elected officials and administration officials weigh a series of next steps at the local, state and federal levels, it's critically important for consumers to use their voices to share their experiences, relating both successes and challenges. This is a difficult time for millions of people throughout the country, and acknowledging that is important in our story collection efforts.
- ✓ **Start the conversation casually.** Sharing one's story requires a level of trust and comfort, even after the person has agreed to speak with you. If you are speaking to a person for the first time, start by asking "ice-breaker" questions such as "how did you hear about today's event?" or "what brought you to today's event?" After establishing a rapport, you can move on to gathering basic information from them. Consider waiting until you've established a stronger rapport before diving deeper into a person's experience; this includes more personal information (age, gender, marital status, children, income, job, insurance status).
- ✓ **Ask for a synopsis of their story.** As a person shares his or her story with you, ask clarifying questions and collect as many details as you're able to. An individual's story can have many angles and there could be multiple opportunities to connect it with the greater messaging goals of your campaign – or a future campaign. If the interview is over the phone, consider recording the conversation (only after requesting and receiving the interviewee's permission) so you can go back and listen in case you missed important details or want to capture a direct quote.
- ✓ **Be thoughtful about audio and visual technology.** Consider bringing a camera or a video recorder if you're conducting the interview in person so you can focus on the person without worrying about missing key details. Newer model mobile phones have excellent quality still photo and video recording capability. Visual documentation of a person or a person's story can be extremely powerful and, with a person's consent, can be shared widely through your website, social media and the press. Always end with a broad question like "is there anything we didn't talk about that you'd like to share today?"

- ✓ **Be clear about next steps.** Assure the person that you will not release their information without prior consent *each time*. Be clear about how you will keep in touch and share with them how you used their story in your advocacy. Get as many phone numbers and email addresses as possible so that you can reach the person quickly if a reporter calls. Be sure to incorporate a consent form into your story collection to determine how to use a person's story, and consider asking for their permission or review before using their information in a public forum.



TIPS ON VIDEO RECORDING STORIES USING A MOBILE PHONE

For fast-turnaround video story collection, the high-resolution cameras of recent model cellphones can be quite suitable in quality. Here are three key things to pay attention to:

Keep the camera steady. There are cellphone stands or tripods available at consumer electronics stores or online which are great, but not needed. Without that, set the phone's lower edge on a solid surface, at a height that frames the shot well and just hold it steady in that position by hand. Place the camera in "Landscape" orientation. That is, turned 90 degrees, so the "movie" image is wide, not tall.

Sound. Be sure you are close enough to your speaker that the audio is picked up well. Do a short test and listen back to be sure it is loud enough in playback, before shooting the full interview.

Lighting. Try to shoot in a setting with good light, whether natural light from a window or artificial indoor lighting. Do a test shot and watch it, to see how the lighting works out on your subject. In particular, be careful not to place your interviewee in front of a bright background. For example: Indoors, NOT in front of a window; or, outdoors, NOT looking toward the general direction of the sun. Instead, set up with your back to the sun or a window, so the light comes over your shoulder toward the subject's face.



GUIDELINES FOR VETTING CONSUMER STORIES

After you've decided that a particular person's story would be beneficial to promote, you should follow up by doing some 'vetting' of that individual. This is a necessary step to ensure that both you and the individual avoid any potential problems after the story is disseminated, as well as to prevent potential miscommunication about a story's usage. Vetting can be done in several steps, and by doing a little planning ahead of time can save you considerable time and prevent avoidable challenges down the road. Sometimes the vetting process reveals that moving forward with a consumer's story is not feasible or advisable. Handling those situations with care and respect is fundamentally important. Here are some of general best practices to assist you and your partners in retaining, vetting and promoting good stories.

- ✓ **Utilize known staff.** Case workers and advocates who regularly meet with clients and/or consumers are great sources for getting to know people and their stories. They are often familiar with the details and know if someone's story is consistent with their circumstances, as they've observed them. Case workers, advocates, enrollment assisters and community health workers usually know about a consumer's situation with providers and payers.
- ✓ **Maintain a list of questions.** Advocates may use Survey Monkey, or other online platforms to collect detailed information during vetting process. Does the story fit the criteria (e.g., are you collecting stories on surprise medical bills? If so, you may want to know the amount of the bill.)? Provide case workers, community health workers and others with a list of questions. Use the questions to solicit more details from individuals up front.

- ✓ **Conduct a web search.** In today's digital world, most individuals maintain an online presence. Check Google, Facebook, Twitter, Instagram and other social networking sites to review an individual's background. This helps identify potential red flags that could make it advisable not to use the story (e.g., offhand remarks, embarrassing or controversial associations, inflammatory photos or comments, story inconsistencies). Due diligence will keep you from being surprised and minimize the chances the red flag becomes the bigger story. While it can be disappointing to have collected a very suitable, accurate and on-point story, but need to pass on disseminating it because of such a red flag, this is one of the central purposes of the vetting process.
- ✓ **Use a consent form.** This protects both your organization and the individual. A legal opinion is helpful in drafting a consent form for your use but is not required. If a story is really compelling and has a potential larger implication, consider the best use of the story. Solicit information regarding the use of photos or video, personal details including medical histories, and individual's names, etc. Also, determine whether they are willing to tell their story to the media, at legislative hearings or at public events.
- ✓ **Consider the client/consumer's best interest.** If this story is in litigation or has a lot of intimate details, it may not be in the client's best interest for this to garner public attention. A story of this type may take a lot of work for storybanking staff. Also consider whether this story will harm the consumer/client.
- ✓ **Consider your organization's best interest.** Since an individual's story will be held up as an example of the problem you are fighting or the solution you are seeking, it's important to take the time to protect your organization. The time you put into this process should correlate to the importance and usage you envision for this story.



SHARING STORIES FROM YOUR STORYBANK

Even one compelling story can get considerable mileage when effectively shared for maximum impact. No matter if you have two or 200 stories in your storybank, it is important to share the stories as widely and strategically as possible. Methods of sharing stories can vary – from digital and social media, in-person storytelling at events and press conferences, traditional media and print options. One or more of these venues may work for any given story or storyteller. How the story was “captured” in your storybank also influences the optimal ways it can be shared. Getting creative about the use of photographs, video, and other methods of story collection can make sharing and packaging stories easier later on.

Remember, whenever possible, it is best to have the person tell her/his own story, but that doesn’t mean that other methods of sharing can’t be effective, as well. It is important to consider a mix of both positive or upbeat stories, as well as those stories that demand action or a change in public policy. At different points in your campaign, you may need different types of stories with different levels of detail or intensity. You can also share stories anonymously if a consumer is more comfortable doing so, but details such as names (even first name) and hometown will always make the story more real and credible to listeners. Be sure that you properly vet all consumers whose stories will be shared publicly.

Digital Methods of Sharing Stories

In today’s digital world, it is important to think creatively in order to ensure your message breaks through the noise – and personal stories remain a surefire way for you to connect with your audience. Whether it is in personal or professional life,

**Because of MNsure,
I have affordable
health insurance.
That’s one less
worry on my plate
as I look toward
graduation.**

—Erickson Saye



Photo credit: TakeAction Minnesota

individuals communicate with each other through digital platforms now more than ever, and we as consumer advocates need to meet our audiences where they are.

Creating compelling social media content requires us to think ahead: Who is our target audience, through which specific channels will we try to reach them and how can we best capture their attention?

Below, you will find a collection of best practices and samples for use in sharing through digital media.

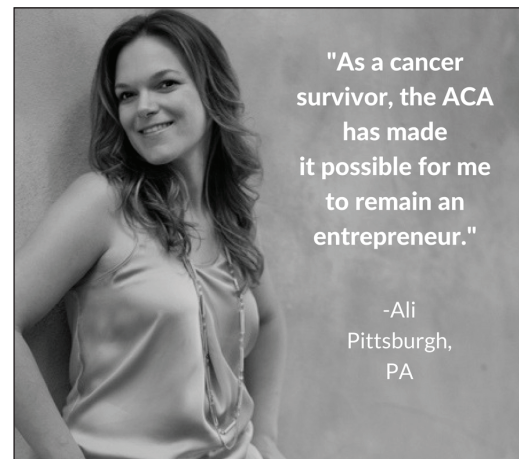
Posting Stories Online

Social media channels are an obvious place to start when it comes to sharing stories online. Twitter and Facebook are the two primary channels, although advocates have used a variety of other platforms, including Tumblr and Instagram. On Twitter, sharing a story usually means using a graphic or a photo with a quotation from the featured consumer and often linking out to a longer-form version of the story. On Facebook, while you may have many more text characters, it still helps to be brief and include visuals. A video is ideal, but you can also create albums with still photos of consumers or other longer-form ways of sharing stories.

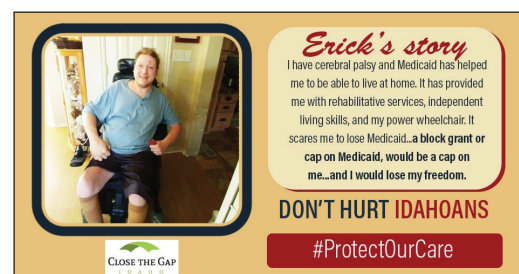
When sharing stories on social media, it's important to not just present the story, but also to give your audiences a call to action. Do you want them to share the story with their networks or perhaps be inspired to share their own story with you as a result of seeing others do the same? You can ask them this directly. Or, maybe you want them to contact their elected officials. Make sure you have an associated action they can take after having viewed your storyteller's health care story.



Raising Women's Voices



Pennsylvania Health Access Network



Close the Gap Idaho

Microsites, Web Pages, and More!

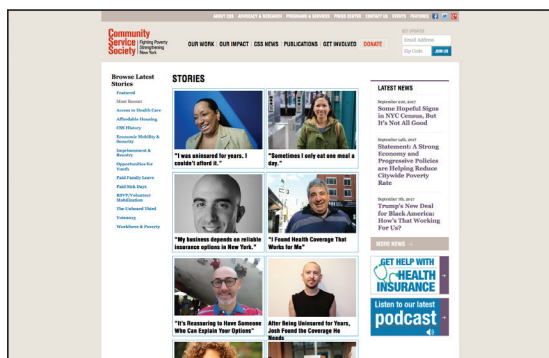
Microsites and landing pages are a great place to house your stories, as well as a great place to send reporters looking for content. A microsite or landing page should frame the issue, tell people's stories, and have multiple calls to action. Separating stories by county or other type of geographic area will allow people to find those who live close to them who are affected by the issue at hand. It also allows local media to be able to find the story that is most relevant to them – and creates a good user experience.

Also, a digital home for stories offers a way for your organization or coalition to collect stories online. When trying to get people to share their personal stories, it is important to explain clearly what you are looking for and solicit enough contact information so you can properly vet them.



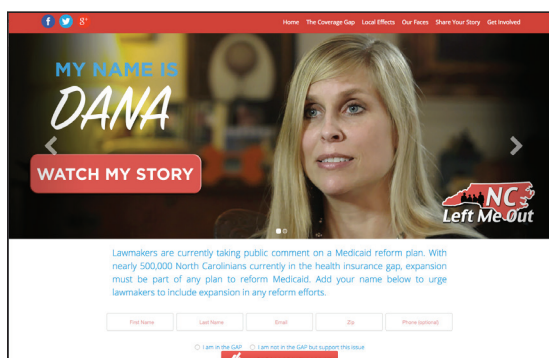
Insure PA:

This site features a collection of stories of Pennsylvanians whose lives have been affected by the Affordable Care Act and Medicaid.



CSSNY:

This section of their website features consumer stories of people who have enrolled in coverage or otherwise benefited from CSSNY's support and assistance.



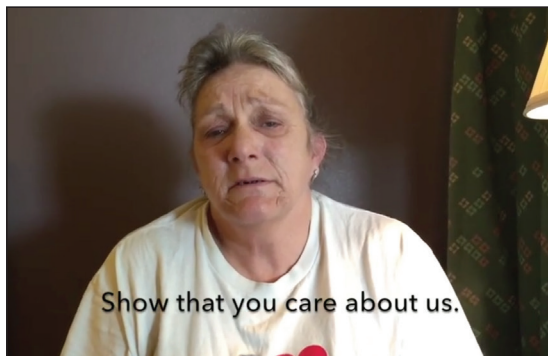
NC Left Me Out:

This site featured a collection of stories of North Carolina residents caught in the Medicaid coverage gap.

Video Storytelling

Videos bring stories to life in a way that surpasses what still photos and/or audio formats can achieve. Videos can be extremely effective and persuasive for sharing your message with your target audiences. While the Internet had been predominantly text-based for years, advances in network reliability and speed have propelled video content to the forefront – and this trend will only continue to grow in the future. The examples below demonstrate how to bring stories to life through short videos:

People who are waiting for coverage



[Dear State Legislators.](#)

This powerful video is a message from Tennesseans in the coverage gap to their state legislators.



[Michele's Story.](#)

A Montana rancher caught in the coverage gap. In 2015, Montana closed the coverage gap by passing legislation to draw down federal funding.



[A Faith Perspective.](#)

A collection of clergy in Alaska talking about the impact being in the coverage gap has had on their congregations and communities.

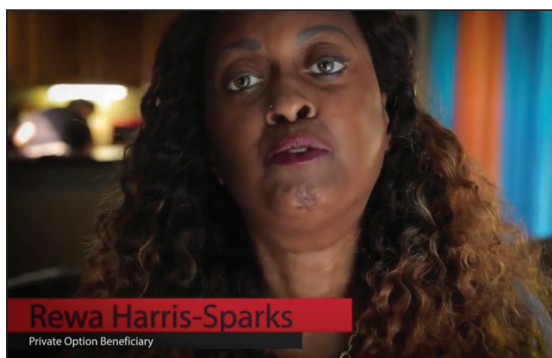
People or families who have benefited from coverage or services



[Heidi Morlock's Story](#). Heidi and her family are self-employed and own their family farm. This video tells the story of why it was so important for the Minnesota legislature to save the MinnesotaCare program.



[CoverNJ](#). This video features three consumers of diverse backgrounds who have been able to get coverage through the Marketplace thanks to financial help and in-person assistance.



["I Work Hard Every Day"](#). This video profiles a working mother who lost her insurance when her husband passed away. Because Arkansas closed the coverage gap, she is able to afford health coverage for herself and her family.



[Olivia's Story](#). Olivia's ability to live independently, with services that meet her needs, preferences and goals is greatly enhanced through the assessment and coordination provided by Jennifer, her Independent Living Long-Term Services and Supports Coordinator.

Non-Digital Methods of Sharing Stories

Sharing consumer stories using non-digital methods can broaden your audience beyond individuals who engage in the digital world. Some non-digital forms of sharing include tangible items, such as a printed storybook, which can be left with policymakers and other stakeholders to make a lasting impression. Here are a few creative ways to share stories non-digitally:

- ✓ **Invite storytellers to events or press conferences.** One of the most powerful and moving methods of sharing stories is to hear a person describe his or her experiences in their own words. Individuals willing to tell their stories in public could do so in the following venues:
 - **Press conference.** Often, a variety of stakeholders are represented at press conferences (ex. health providers, business or faith leaders, advocates). Expanding the range of voices by having consumers speak about how this issue affects them personally can help underscore the human face of otherwise dense and complex policy issues and frequently serves as a hook for increased media coverage.
 - **Public event.** Advocacy or community events such as rallies and town halls are great venues to share personal stories. Any place where people congregate is an opportunity for education and calls to action. A personal story about the impact of the Affordable Care Act or Medicaid on one individual or family could inspire attendees to take action to protect gains in health coverage and access – or to share their own stories with advocates. Individuals can attend and tell their own stories, or if the storyteller cannot attend, can write it up as a letter to share. If the meeting gets heated, a story can make it clear what the law does – or doesn't do – and how it will help people. Put the focus on the person/family/child who is getting help.



Photo Credit: Montana Women Vote

✓ **Share stories using postcards or fliers.** In cases where an individual cannot attend in person or is not comfortable speaking publicly, write up the story with a photo or illustration and print out fliers or postcards to hand out at meetings or gatherings where people who will identify with your storyteller will be present. Thinking about your audience can help determine what type of story is most appropriate to use. For example, if the story is about a family, try back-to-school events at the mall or county fairs. If it's about a young adult, a college campus event or office, alumni newspaper, or college radio station might be a good place to share. If the story concerns an older adult, senior or community centers and churches might be a good fit. Postcards that briefly tell stories can also be sent directly to elected officials.

✓ **Connect consumers directly with the media.** In addition to using stories in news releases, pitch the story to reporters, columnists, local radio and TV media. In cases where it is appropriate, make the connection between media and consumers directly by setting up an initial pitch meeting with a reporter or editorial board. Earned media such as articles, opinion pieces, or letters to the editor can be enhanced by the use of consumer stories. Letters to the editor can be written by consumers directly with help from advocates.

✓ **Become a resource.** Members of the media, whether reporters, editors or columnists, often look to community organizations to help them connect with a “real person” who can tell a relevant story. Keeping an up-to-date and organized storybank provides quick action for the moment when a journalist reaches out – and they remember their sources who can give them speedy access to information. If you are able to provide a timely response, you may find yourself being contacted in the future for positive stories or insight when news breaks.



70,000 hard-working Montanans cannot afford to wait for health care.

Tell your legislators to support a Montana-made solution to provide health insurance for our hard-working neighbors.

www.acscan.org/mtmade

ENDORSED BY:

Alliance for a Healthy Montana • AARP-Montana
American Cancer Society Cancer Action Network
American Lung Association in Montana
Association of Montana Public Health Officials
Montana Nurses Association
MHA...An Association of Montana Health Care Providers
Montana Public Health Association
National MS Society, Greater Northwest Chapter

Photo credit: Montana Budget and Policy Center

sharing



“LIVES ON THE LINE”

Pioneered by Athena Smith Ford and Antoinette Kraus of the Pennsylvania Health Access Network (PHAN), “Lives on the Line” is a storytelling strategy that visually depicts the human impact associated with health policy changes by pairing consumer photos or videos and stories together in visual displays. Since PHAN’s initial “Lives on the Line” effort, advocates in many states have created a physical “Lives on the Line” displays that can be used at rallies, town halls, or other community events where they may be staffing tables to promote action, collect names and contact information of prospective members, or even to collect additional stories. Some advocates have set up “Lives on the Line” as a multimedia project by hosting stories and photos or videos on a dedicated website, or by developing a “Lives on the Line” social media campaign.

sharing

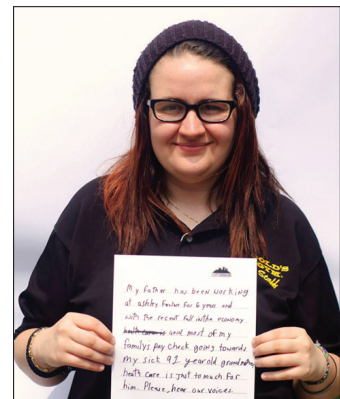
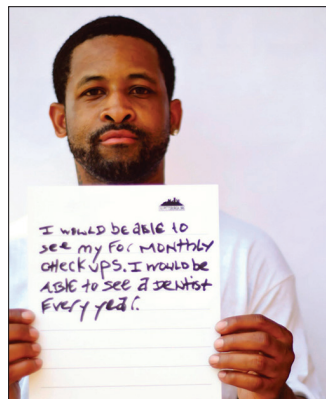


Photo credit: Pennsylvania Health Access Network

- ✓ **Create a storybook.** Compiling a few stories together into a booklet, known as a storybook, is one way of sharing stories more easily with lawmakers and other policy stakeholders. Stories in the book are often coupled with photos of the individual or families represented and/or with facts and figures about the impacts of health policy decisions. Storybooks are a nice leave-behind after an in-person meeting, or at a town hall event or legislative hearing.

It is important to consider the audience of your storybook when determining which stories to include. The types of stories, demographic characteristics of the consumers in the storybook, and predominant narrative of the storybook can be tailored for maximum effectiveness with key individual policymakers. For example, if a policymaker is interested in the well-being of children, highlighting stories of children and parents can be persuasive. Other policymakers may be interested in the stories of individuals employed in certain industries important to the state or locality, such as farming or coal mining.

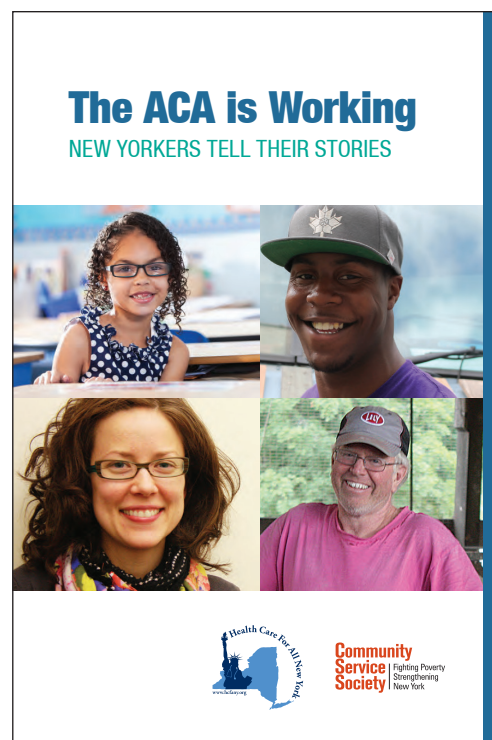


Photo credit: Community Service Society of New York

- ✓ **Engage with elected officials**
 - **Phone calls.** Elected officials need to hear directly from consumers about the importance of affordable health coverage. Calls and in-person meetings are the best way to ensure that these messages break through – both to supportive senators and representatives as well as to those we are trying to persuade or take action. Consumers can share their personal stories and support for Medicare, Medicaid and other needed health programs with their U.S. senators or other members of their federal delegation.
 - **Sharing stories with supporters.** Supportive members of Congress need consumer stories that they can use when they stand up to ACA repeal efforts, attacks on Medicaid funding and other harmful changes to the health care system that are likely to continue. Sharing stories directly with these elected officials, particularly from constituents in their states, can help them to make the issue personal and human to them as they debate the merits of proposed policy changes.

As described above, sharing consumer stories across multiple platforms, both digital and non-digital, will increase your reach and maximize the effectiveness of your storybank as a tool for advocacy. No matter how you share their stories, consumers talking about their experiences in their own words puts a human face to complex and challenging policy issues. This humanization can make all the difference in moving the public and key policymakers to support your cause. The ideas in this toolkit are a starting place as you determine how best to deploy your storybank for advocacy, but don't be afraid to get creative and have some fun generating new and different ideas for sharing stories!



CONCLUSION

Personal stories are the bedrock of any effective, inclusive and powerful advocacy campaign. Stories cut through the noise of frustrating politics and complicated policy debates to help us better understand and feel the actual impact of the policies we are trying to change. Building a strong storybank in your own organization or with your partners should be a critical and ongoing priority in your advocacy work. Collecting stories is not always a simple task. The process requires creative outreach strategies, diligent follow up and meaningful relationship-building with people from all corners of your community. Your hard work will pay off – the stories you capture will help you and your partners build a stronger advocacy movement that lifts up diverse voices and experiences.

Acknowledgements

Community Catalyst would like to express deep appreciation to the state consumer health advocates who contributed to this toolkit and took the time to share with us their knowledge, expertise and insights about story collection and advocacy. We would like to extend special thanks to Nicole Dozier from the North Carolina Justice Center; Patrick Keenan and Antoinette Kraus from the Pennsylvania Health Access Network; Elizabeth Prohasky from the Community Service Society of New York; Katie Alexander and Keila Franks from the Tennessee Justice Center and RyLee Curtis from the Utah Health Policy Project.



STORYBANKING CONSENT FORM

Everyone has a health care story. Building the capacity, influence and power of state and local organizations to make sure consumers have a say when there are changes that affect their health care requires listening and sharing information; personal stories play a major role in accomplishing this.

Your story will help us build a strong consumer voice and raise public awareness. This document will protect your personal information and helps _____ keep a record of when and how to share your story.

Organization Name

- ☐ You may use my story with my full name and town
- ☐ You may use my story with my first name and town
- ☐ You may use a photograph of me accompanied with the information above (1 or 2)
- ☐ You may use a video of me accompanied with the information above (1 or 2)
- ☐ I am willing to tell my story in public and/or to legislators
- ☐ I am willing to tell my story to members of the media
- ☐ 7. You may use my story but please keep my name anonymous
- ☐ 8. You may use my photo but please keep my name anonymous

I give permission for _____ to use, publish and condense my testimonial at its own discretion. I understand that the _____ reserves the right to use and modify submissions as standard procedure, and may publish my testimonial through any and all media now or hereafter known. I hereby release, discharge and agree to hold harmless _____ and its members acting under its permission from any liability relating to the publication of this testimonial.

Organization Name

Organization Name

Organization Name

Printed name of the subject: _____

Street: _____ City: _____ State: _____ Zip: _____

Phone number: _____ Date: _____

Signature: _____

My signature above means that:

- I have read and understand this consent form.
- I have been given all of the information I asked for regarding sharing my story.
- All of my questions were answered.
- I agree to everything explained above.

[FOR MINORS ONLY] If you are under 18 years of age, your parent or legal guardian must sign this Consent and Release Form and provide the information requested below. I certify that I am the parent or legal guardian of _____ and I agree that I have read this document completely before signing and I understand its contents.

Legally responsible person: _____ Relationship to subject: _____

Signature: _____

Street: _____ City: _____ State: _____ Zip: _____

Phone number: _____ Date: _____

If you have questions, you can reach

_____ with _____ at _____ and _____

First Name

Organization Name

email

Phone Number