



Sharing Your Impact Resource Series

GATHERING FORMAL & INFORMAL STORIES

In this resource you will learn how to gather formal and informal stories of impact from your project. **The resource includes the following sections:**

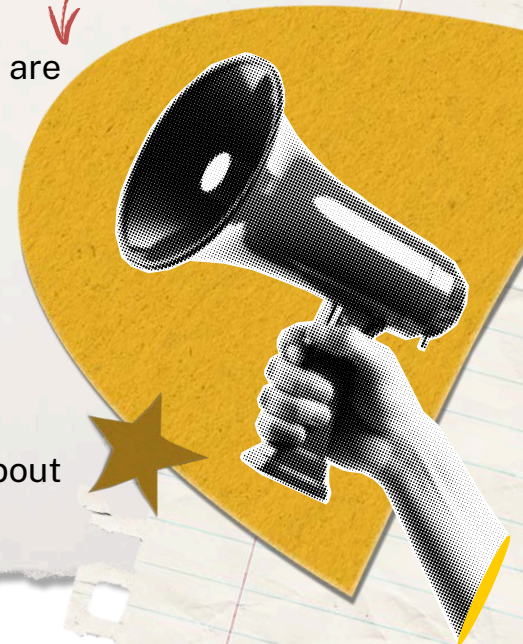

Step 1: Decide whether you need to collect stories: Stories are best when you need context and personal perspectives.

Step 2: Decide to collect stories formally or informally: You can collect stories in planned settings or in natural conversation.

Step 3: Explore methods to fit your needs and context: Ask open-ended, respectful questions in a logical order.

Step 4: Begin collecting personal stories: Be thoughtful about how you'll facilitate and record the conversation.

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About the series:

An important part of community projects is **sharing their impact**, or the change they create in the community. Sharing impact celebrates your hard work, gets people excited about your project, and shows funders the outcomes you achieved. **Evaluation** is the process of measuring the impacts of your project. [Canadian Mental Health Association, Alberta Division](#) and [Centre for Suicide Prevention](#) and [PolicyWise for Children & Families](#) collaborated to create a resource series to support rural community members in evaluating their mental health projects. To see the entire series, check out its [web page](#).

GATHERING FORMAL & INFORMAL STORIES

Reports often use numbers to show impact, but have you ever wondered about the stories behind the numbers? Through conversations, you can gather detailed accounts of people's thoughts, perspectives, and lived experiences. You can collect personal stories through interviews, focus groups, testimonials, or anecdotes. These conversations are valuable because they help you learn more about your community's lived experiences and points of view.

Personal stories can serve many purposes, but they are mainly used to:

- Highlight what went well during a project and how to improve it in the future.
- Describe diverse experiences, particularly from people who are left out of mainstream dialogues.
- Add context to numerical data gathered about projects and events.
- Make sense of participants' experiences and the changes that have occurred for them thanks to the project.
- Share the positive impact a project has had on participants or community.

Recording personal stories can happen formally, by creating opportunities for these conversations to occur, or informally, by keeping track of stories people share in natural conversations. Below is a step-by-step guide on how to collect personal experiences in your project.



Step 1: Decide whether you need to collect stories

Personal stories might not be the right choice for your project if you need broad information from a lot of people.

Stories are most appropriate when:

You need details about a topic.

For example, your community is interested in the mental health challenges that impact different age groups. You collect stories from people of different ages to highlight differences and similarities across the lifespan.

You are interested in a complex or sensitive topic.

You are interested in learning more about people's experience with mental health diagnoses to create resources on stigma. You conduct one-on-one interviews with community members about their first diagnosis with a mental health condition and their journey through treatment.

You want to understand participants' beliefs, decisions, or opinions and the reasons why they feel the way they do.

Your project is interested in learning more about what mental health activities would support youth in the community. Participants are invited to join a focus group about their opinions and decisions to attend community activities. Their stories reveal insights about how to improve engagement and plan activities informed by them.



Step 2: Decide to collect stories formally or informally

Once you decide to collect personal stories, you will need to think about your approach to gathering this information. Personal stories can be collected in formal or informal ways.

Formal Methods

Formal methods include conversations that are scheduled in advance, such as interviews or focus groups, and open-ended survey questions. Through these methods, participants can share their thoughts freely.

Including open-ended questions on surveys is a convenient way to gather stories if you are already using surveys to collect other information. Open-ended survey questions give participants an opportunity to reflect on their experiences and give more detailed responses in writing. However, participants may skip these questions because writing can take more time and energy than other kinds of survey questions. For more information about creating surveys, check out [Creating Surveys & Collecting Numeric Information](#).

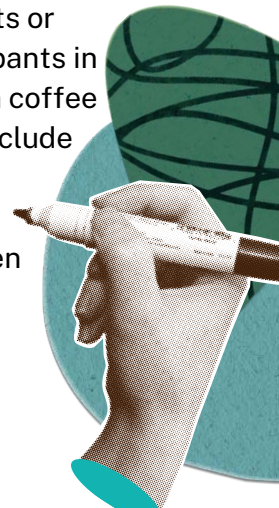
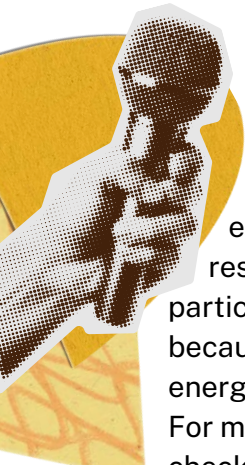
Formal approaches are best when you know exactly who you want to hear from and how to get in touch with them. Since interviews and focus groups require a time investment from participants, they're best used for evaluating long experiences, such as an entire project or a multi-session training. To create a community atmosphere for group conversations, you can provide food. To thank your participants for their time and energy, you can offer them a gift card or another token of appreciation.

Informal Methods

Informal stories are personal accounts or anecdotes that are shared by participants in natural settings, such as at events, in coffee chats, or on social media. They can include reflections on past experiences, providing insight into a project's processes and outcomes. People often share stories about project impacts spontaneously and voluntarily during conversations.

For example, during a casual conversation, a community member might praise an event organizer for the positive impact an event had on their community. As a project leader, you can listen for these opportunities and capture them to show the impact of your project.

Informal conversations can be used to collect information about shorter experiences or in situations where it is harder to identify the right people to talk to. If you're planning to collect informal stories, you can hear from people right after the experience happens. You can also have multiple people listening for informal stories to get many different perspectives that don't rely on participants trusting one person. Informal conversations can feel more comfortable for participants, especially in communities that have experienced harm when participating in formal research.



Step 3: Explore methods to fit your needs and context

Part of a good conversation is asking good questions. Ensuring that you ask questions carefully is important – otherwise, you might get biased information. For more information about bias, check out [Creating Surveys & Collecting Numeric Information](#). Here are some tips for asking good questions:



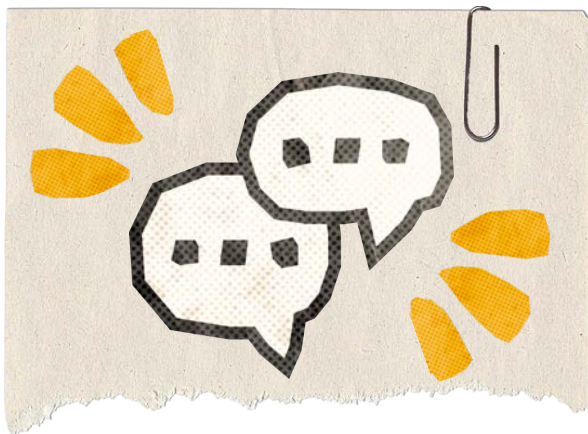
Do ask open-ended questions. Ask questions that allow participants to explain their opinions, beliefs, or experiences. Use phrases such as, “how,” “why,” or “tell me more about that.”



Do ask questions that are respectful of different cultures and backgrounds. Use neutral and inclusive phrases that do not make assumptions about other people. *Example: Asking participants “How has the project helped you build social connections?” instead of, “How has the project stopped you from being lonely?” The second question assumes that a person has been lonely, which may be a sensitive topic for them or not applicable.*



Do ask questions in a logical order. The first question should naturally flow into the second question, and so on.



Don't ask leading questions. A leading question is a question that prompts a specific answer from participants. Asking leading questions might pressure participants to give an answer that doesn't reflect their true opinions.



Don't ask double-barreled questions, or questions that actually contain two questions. Asking two questions in one can confuse participants. *Example: “Are you more connected to the community and has it improved your mental well-being?” Instead, you could ask, “How did participating in the community coffees impact your feeling of community connection?” AND “Did participating in the community coffees impact your overall mental well-being? How?” separately.*



Don't ask questions that can be answered with a simple ‘yes’ or ‘no.’ These questions limit how much detail you can collect, and they don't encourage participants to elaborate on their experiences.





Although you won't be able to plan your questions in advance if you're collecting stories informally, it can be helpful to think about what you want to find out from participants ahead of time so that you're ready when opportunities to collect stories arise.

Step 4: Begin collecting stories


Gathering stories is an art. You have to actively listen and pay attention to your surroundings.

Considerations for gathering stories:


 **How do you want to present yourself?** To help people feel comfortable, you can establish common ground, either with the participant or in relation to the topic. For example, if you are interested in learning about the community's mental well-being, you can share why you are interested in the topic. You can also tell participants how the stories they share will be used to help your project.

 **How can you build trust with participants?** To encourage people to share openly, it's important to build rapport with them. This can be achieved by doing things to make the participant feel comfortable, such as being a good listener, using body language to show you're engaged, and asking for details without interrupting.


- Giving participants time to think about their answers shows respect for their opinions. Participants are more likely to give honest and detailed answers when they feel heard and understood.

 **How do you want conversations to flow?** Each conversation is different. You can prepare questions to guide the conversation beforehand or you can let the conversation flow naturally without a set of questions. You might want to be prepared with some guiding questions but leave time for the conversation to flow. Without these guiding questions, you may find you don't get the information you need by the end of the conversation.

 **What type of environment are you in?** Conversations can take place anywhere. If the topic is sensitive, it may be best to meet somewhere participants feel safe and that protects their privacy (e.g. reserved room in a public library or a cafe with lots of space). Participants may share more if no one else can hear.

 **How will you obtain consent?** Consent is key to facilitating conversations. People have the right to make their own decisions, so getting participants' consent ensures participation is voluntarily.

- Consent can be obtained by having participants sign an information letter or by obtaining verbal consent before the conversation starts. When asking for consent, it is important to mention:
 - They don't have to participate.
 - How you might use their information. For example, will you use quotes in a report or just a high-level summary?
 - How you will keep identities private.
 - Why you are interested in the topic.
 - How the participant can contact you if they have questions or want their information deleted.

 **For informal conversations:** ask for consent if the participant shares detailed, personal information that you would like to use. If their comments are general, you don't have to ask them. Generally, if you're going to write down a participant's exact words and share them, it's a good idea to get their consent. If you're only using themes, you don't need their consent.

Recording personal experiences

If you are using a formal approach, there are many tools available to help you document your conversations. While you can use pen and paper to take notes, it also helps to record the conversation in case you miss anything. Recording the conversation also helps you pay attention to the participant rather than paying attention to writing your notes. Conversations can be recorded using a tape recorder, digital recorder, or cell phone. Free online platforms, such as [Otter.ai](#), can turn audio recordings into written transcripts.

If your conversation is taking place virtually, Zoom, Google Meet, and Microsoft Teams have built-in functions that can record your interview and generate a transcript of the conversation. For instructions on how to record virtual meetings, please see the resources below:

- [How to record a Zoom meeting](#)
- [How to transcribe a Zoom meeting](#)
- [How to record a Google Meets meeting](#)
- [How to transcribe a Google Meets meeting](#)
- [How to record a Microsoft Teams meeting](#)
- [How to transcribe a Microsoft Teams meeting](#)

When you are saving your stories on your computer, make sure to remove any information that could identify someone. It is best to take out names, ages, addresses, workplace information, or other confidential details. For more protection, you can make sure your computer has a strong password or [password-protect your data files](#).

Once you know you have an accurate transcript, you can delete the audio recording to further protect your participants' identities.

If you're using an informal approach, you can make note of stories in many different ways. When participants share their thoughts and experiences with you, you can quickly document them by:

- Writing down comments in the 'Notes' app on your phone
- Texting or e-mailing their comments to yourself
- Writing stories down in a notebook

What's next?

After collecting your stories, you can use quotes from your participants in your project reporting or analyze them for common themes. For more information about analyzing and sharing stories, check out [Analyzing & Sharing Stories of Impact](#).

