

This manuscript is in preparation for publication. When finished, it will be book two of a four-volume set:

1. Working with Stories in Your Community or Organization: Participatory Narrative Inquiry (Fourth Edition)
2. **Working with Stories Simplified: Participatory Narrative Inquiry in Brief**
3. Working with Stories Sourcebook: Questions and Case Studies for Participatory Narrative Inquiry
4. Working with Stories in Depth: Advanced Topics in Participatory Narrative Inquiry

Please send comments, suggestions, and questions to cfkurtz@cfkurtz.com.

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Working with Stories

Simplified

PARTICIPATORY NARRATIVE INQUIRY IN BRIEF



Cynthia F. Kurtz

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Participatory narrative inquiry (PNI) is an approach in which groups of people participate in gathering and working with raw stories of personal experience in order to make sense of complex situations for better decision making. PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

Working with Stories Simplified is a textbook that tells you how to do PNI. It's a shorter, simpler version of *Working with Stories*, which tells you the same thing, only with more words.

*I wrote this first draft in PowerPoint. **Please send feedback** as I work on converting it to a LaTeX book manuscript for publishing. Note that the page numbers restart in each chapter.*

Chapter 1 – Introduction (25 pp)

Chapter 2 – Story Fundamentals (43 pp)

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CHAPTER ONE: INTRODUCTION

This chapter makes the case for using Participatory Narrative Inquiry.

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WHY work with stories? What can I do with participatory narrative inquiry?

Why WORK WITH stories? Why not just tell and listen to them?

Why work with STORIES? Why not gather facts and opinions?

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to answer questions.

By asking people to share stories about a topic, and then asking them some questions about those stories, you can discover useful patterns that can help everyone make sense of the topic.



We asked our nursing home patients about their interactions with our caregivers.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to catch emerging trends.

Catching trends is like answering questions, but it covers situations where you don't know which questions to ask. You might simply want to know what problems or opportunities might be on the horizon.



We asked our teenage members about the volunteer work they have loved and hated.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to make better decisions.

Looking at patterns in told stories can provide practical support when choosing between available options. Participants might even move into fictional space to explore possibilities for the future.



We built three different possible futures for our town, drawing from our stories of the present and past.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to get new ideas.

If you want to plan for the future or solve a problem, and you want to explore as many options as you can, you can cast a wide net and invite a large group of people to brainstorm with you by asking them to tell stories and work with them.



We asked the people in our community about times when they saw tense confrontations defused with compassion.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to resolve conflicts.

One way to help people in a group understand life from the eyes of people in another group is to collect anonymous stories from both groups and make them available in ways that make it easy to connect stories across traditional boundaries.



We asked kids from 26 countries about the ups and downs of their lives, and we built a presentation that revealed the nationality of each child only after their story was read or told.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to connect people.

Helping people share their experiences in a group can help new members understand the unwritten rules of the community, and it can create a shared language for guiding behavior and resolving disputes.



We asked some of our students to help new students by sharing their experiences and working together to build a story-filled orientation handbook. They were so proud of their work, and they felt more connected to the university community.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to help people learn.

Sharing stories about learning can help a community become more collectively productive.



On every page of our new software, there are two small buttons. One says “Help!” and the other says “Eureka!” After the user clicks either button, they are asked to tell the story of what happened. If they clicked Help, their story helps them find both similar stories and useful information. If they clicked Eureka, their story helps other users find the answers they need.

WHY WORK WITH STORIES?

WHAT CAN I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

You can use it to enlighten people.

Groups with a mandate to educate people on specific topics will find that story work can be helpful to them in three ways.

- Collecting stories of real experiences can help you work out the best way to communicate your message.
- One of the best ways to persuade people is to show them the authentic experiences of real people like themselves, not more of the hype and prepared messaging they have already seen and found unconvincing.
- Working with stories can also help you to explore any limiting assumptions you might have about your goals, your message, or your audience.



We asked adoptive parents about their families, and we worked with them to build better resources for people who are curious about adoption.

WHY NOT WORK WITH STORIES?

WHAT CAN'T I DO WITH PARTICIPATORY NARRATIVE INQUIRY?

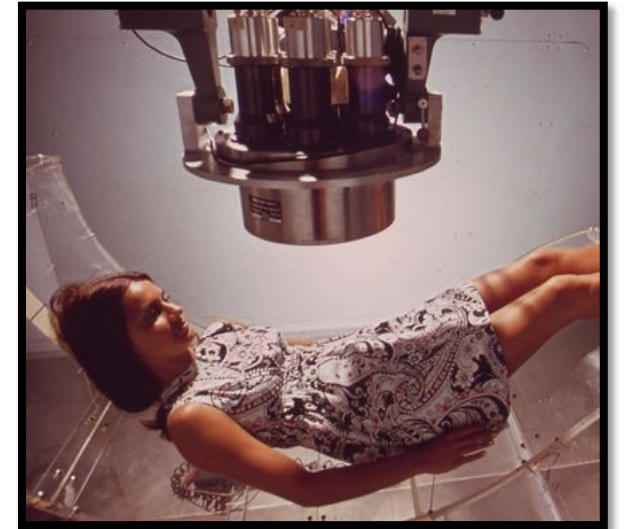
You can't use it to prove anything.

When you work with stories, you must be willing to give up on the idea of finding specific answers, testing specific hypotheses, or conducting controlled experiments. You can't control how – or whether – people will share stories with you and with each other.

Is that a problem? Not at all. When your subject is human beings and the things they feel and believe, proof isn't a very useful thing.

What is useful is *help* making sense of situations and coming to decisions. For that purpose, working with stories is a very useful thing.

Working with stories
is not like this.



It's like this.

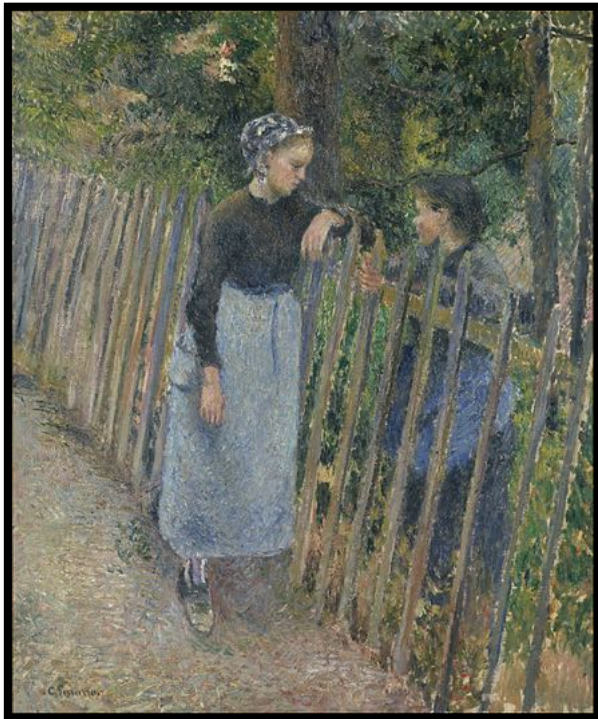


WHY WORK WITH STORIES?

WHY NOT JUST TELL THEM AND LISTEN TO THEM?

Don't stories work well enough already? Not as well as they worked a long time ago.

In **pre-modern** times, story sharing was strong, habitual, and useful, a valuable asset of every community.



Travel was slow, infrequent, and local. Connections were long-term. Narrative continuity was high.

Much time was spent doing tedious but quiet activities that lent themselves well to story sharing (e.g., farming, food production and processing, crafting and repairing clothing and household items).

There were relatively few professional storytellers, and many amateurs. Among these groups there was relative social equality.

As a result, challenges and alterations to popular stories were both expected and accepted.

WHY WORK WITH STORIES?

WHY NOT JUST TELL THEM AND LISTEN TO THEM?

In the **modern** age, story sharing grew weakened, fragmented, and disrespected.



Travel was fast and frequent. Mobility was high. Connections were often broken. Narrative continuity was low.

Labor-saving devices removed the necessity of spending time together doing quiet boring work.

The juggernaut of commercial storytelling, first in penny novels, then in movies, TV, and magazines, redefined the world of stories. Many professional storytellers jockeyed for position. Those who succeeded rose far higher socially than ever before. Few amateurs dared to challenge the status quo.

As a result, challenges and alternations to popular stories became difficult, risky, and rare. People learned to be “good audiences.”

WHY WORK WITH STORIES?

WHY NOT JUST TELL THEM AND LISTEN TO THEM?

The **post-modern** age has brought about a partial revival of everyday storytelling.



Mobility remains high, but the ability to connect over long distances has greatly increased. This has led to (relatively) more longer-term connections and greater narrative continuity.

The (relative) revival of crafting and DIY hobbies has created new social contexts in which casual story sharing can take place.

The proliferation of new forms of low-entry-cost media has (somewhat) reduced the status of professionals and elevated the status of amateurs. As a result, audiences are now more inclined to “take over” popular stories and demand changes. Fan fiction, for example, has (to some extent) disrupted the tradition of the “good audience.”

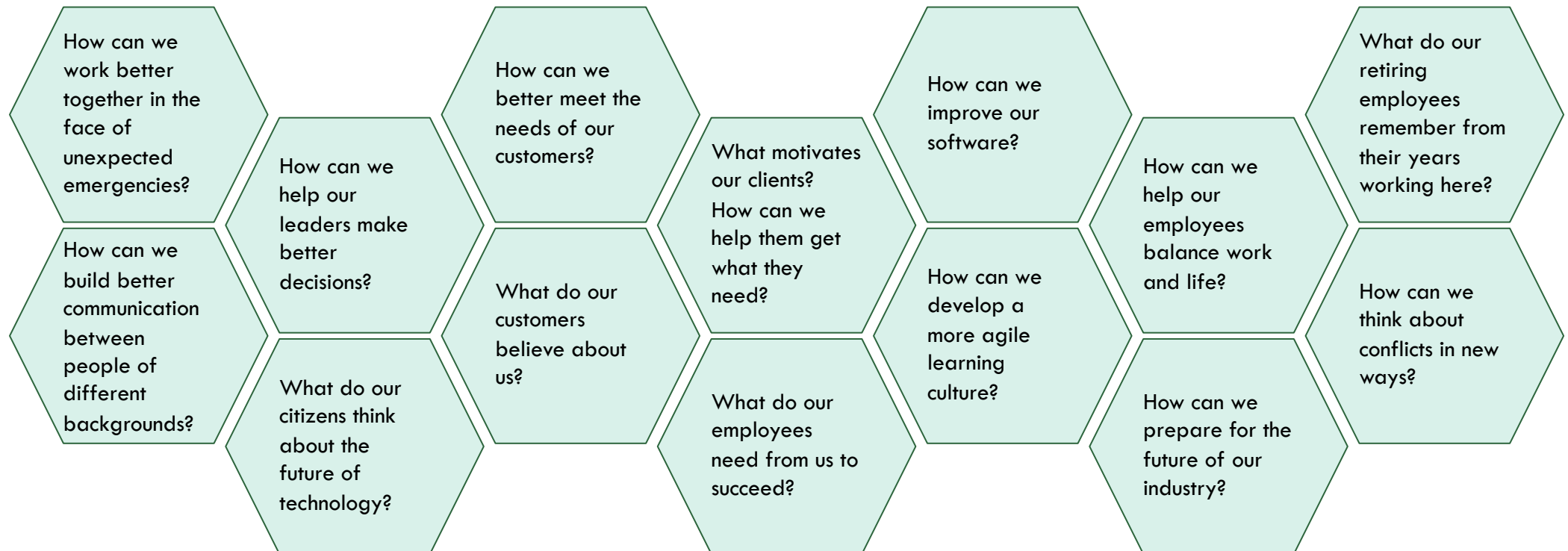
In short, people are taking their stories back, and PNI is part of that revival.

WHY WORK WITH STORIES?

WHY NOT JUST TELL THEM AND LISTEN TO THEM?

But why make sense of stories? Why not just share them?

Because it's useful. *Here are some questions that have been explored by real PNI projects.*



WHY WORK WITH **STORIES?**

WHY NOT WORK WITH FACTS AND OPINIONS?

Sharing stories is an ancient social **ritual**.

When people are talking and a story comes up, the conversation undergoes a subtle shift in tone, signaling a transition to a ritualized interaction. A story is offered and accepted, and **an agreement is put into place**.

Under the terms of this agreement, the storyteller has the floor and may speak freely (within limits). Everyone else must listen and refrain from attacks **until the story has run its course** (again, within limits). We are taught as children how to take part in this ritual, though we rarely speak of it or realize that we are doing it.

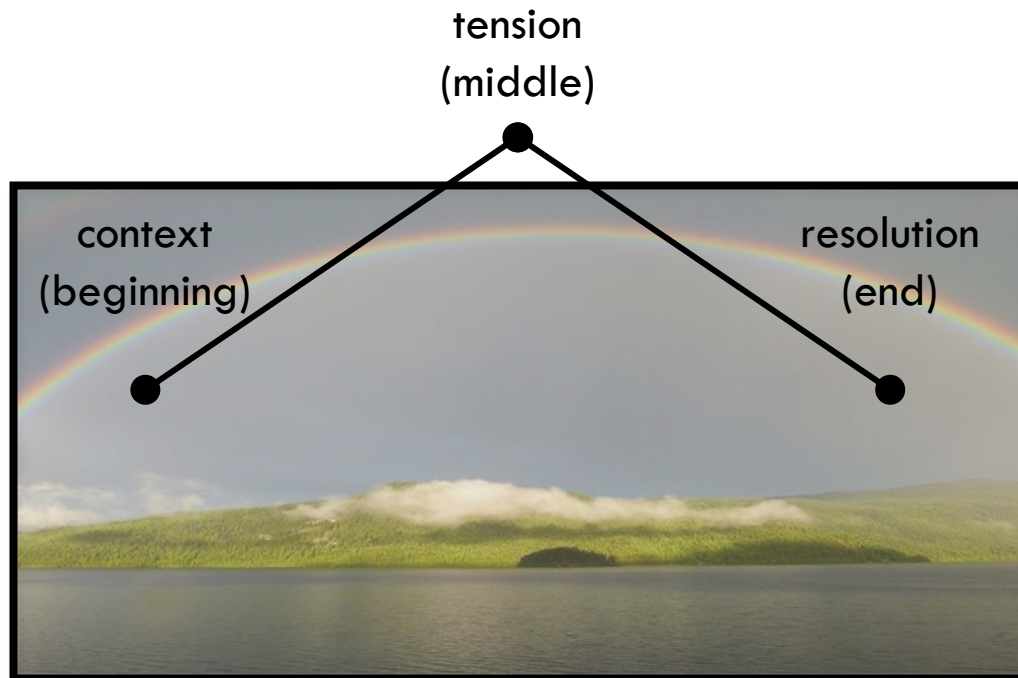
When you ask someone to share a story with you, you initiate this ritual, and you agree to give that person the same attention and freedom as they would receive from a respectful friend. This helps the person to open up and tell you **things they could not tell you** without such an agreement in place.



WHY WORK WITH STORIES?

WHY NOT WORK WITH FACTS AND OPINIONS?

Stories draw us in – for a very good reason.



Sharing stories is a **cultural survival skill** akin to our use of fire and domestication of plants and animals. Part of the skill is the fact that every story conforms to the same fundamental shape. A context is introduced; a tension develops; the tension is resolved. This wait-and-see structure attracts our problem-solving brains like moths to a flame. And this helps us to **maintain the effort required** to fully explore the story, learn what we can from it, and apply what we have learned.

In our modern times, it's easy to see that stories engage their audiences. What may not be obvious is that **stories engage their tellers** as well. When you want to help people think about a topic, asking them to share stories about it helps them to maintain the effort required to explore the topic more fully and deeply.

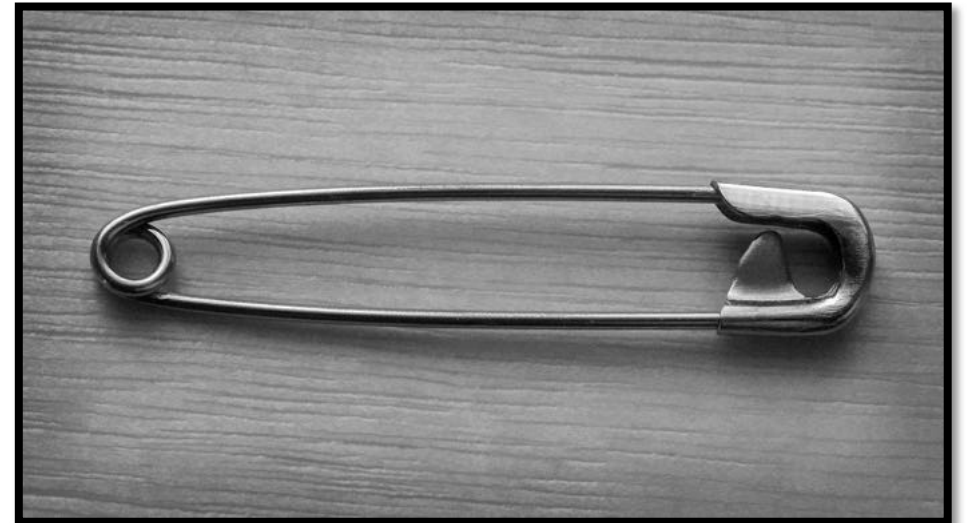
WHY WORK WITH STORIES?

WHY NOT WORK WITH FACTS AND OPINIONS?

A story is like a social safety pin. It's a safer way to do a dangerous thing.

The **emotional distance** between narrated events (what happens in stories) and narrative events (what happens when people share stories) provides the safety we need to reveal deeply held feelings and beliefs. Once we have told a story, we can invite others to think about it without exposing ourselves to the same degree as if we had stated our feelings and beliefs directly. The forms and rituals of storytelling are like the protective guards on a safety pin.

When you want to help people think together about a topic, asking them to share stories of their experiences rather than stating their opinions is like **giving people safety pins** rather than straight pins to work with.



WHY WORK WITH **STORIES**?

WHY NOT WORK WITH FACTS AND OPINIONS?

Story listening shows respect.

We are all accustomed to being asked for our opinions in standard surveys. We all know how to get out our well-worn poker faces for that game. **Asking people to share stories is a different game**, one in which greater respect is afforded to all players. Taking the time and care to help people explore what has happened to them and how they feel about it can help them **tap into hidden sources of energy** as they work together toward a common goal.

You can also show respect by giving people the freedom to choose which story they will tell, how they will tell it, and what they will say about it afterward. And people will notice and respond to the way in which you treat their stories, whether it's open and supportive or closed and exploitative.



WHY WORK WITH **STORIES?**

WHY NOT WORK WITH FACTS AND OPINIONS?

Stories tell us what we don't know we know.

When people tell stories, they sometimes reveal feelings and beliefs **of which they themselves are not aware**. When the answer to a direct question is “I don't know,” recalling and describing a relevant experience can surface tacit knowledge and reveal hidden feelings and beliefs.

After the story has been told, its teller may *still* not know the answer to the direct question. But **the answer is in the story**. If you can ask them some questions *about* the story, those answers are likely to be meaningful – often surprisingly so – to the storytellers and to others as well.



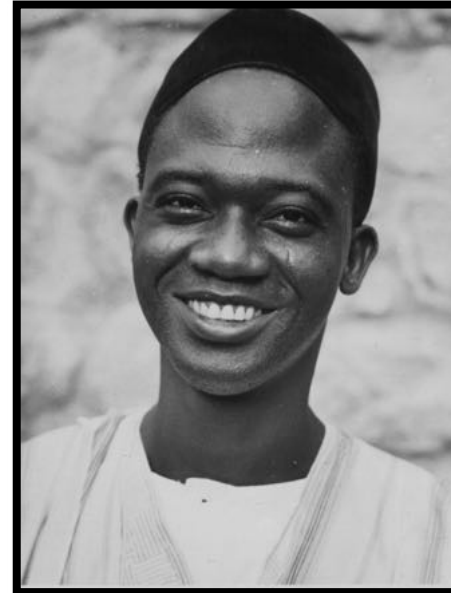
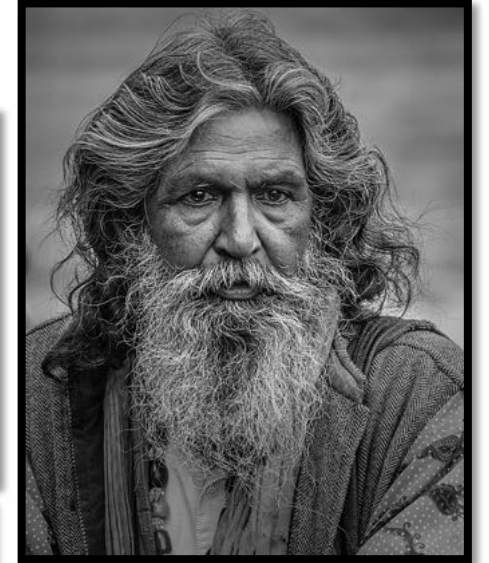
WHY WORK WITH **STORIES**?

WHY NOT WORK WITH FACTS AND OPINIONS?

Stories help us to see the world anew.

When we listen to a story, we experience a suspension of disbelief and a **displacement of perspective** that helps us to see the things we thought we understood through new eyes.

A shared experience of expanded perspective can lead groups of people to deeper insights than they can achieve through the simple summing up of opinions and facts.



WHY WORK WITH **STORIES?**

WHY NOT WORK WITH FACTS AND OPINIONS?

Working with stories brings many imaginations together.

When a topic is complex and many-layered, the best course is to increase diversity, generate many ideas, think out of the box, and prepare for surprise. Asking a diverse range of people what they have done and seen – and what they would and would not like to do and see in the future – brings their imaginations to bear in a **synergistic explosion of creativity**.

Sharing stories broadens the net of exploration by opening the inquiry to the multi-dimensional **varieties of human experience**. Direct questioning, though precise, is narrowly focused. It produces uni-dimensional content that can provide only one answer.



WHY WORK WITH **STORIES**?

WHY NOT WORK WITH FACTS AND OPINIONS?

Stories provide a contextually connected network of meaning.



When you ask direct questions, it is easy to guess wrongly about what sorts of answers people might want to choose, and even about what sorts of questions might lead to useful answers.

Asking people to talk about their experiences can sometimes lead to useful answers **even if you ask the wrong questions**, because the contextual richness of stories provides information in excess of what was directly sought.

In fact, being surprised by the questions answered (and posed) by collected stories is a frequent outcome of participatory narrative inquiry.

IMAGE CREDITS

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Patient and caregiver <https://www.flickr.com/photos/68716695@N06/29609199652/>

Volunteers <https://www.flickr.com/photos/blmcalifornia/51914331263/>

Woman speaking at meeting [https://commons.wikimedia.org/wiki/File:A_member_of_a_civil_society_group_asks_a_question_at_a_town_hall_meeting_conducted_by_AMISOM_and_the_Somali_National_Police_Forces_at_the_Ministry_of_Information_in_Moga_dishu,_Somalia,_on_October_21._\(15405353178\).jpg](https://commons.wikimedia.org/wiki/File:A_member_of_a_civil_society_group_asks_a_question_at_a_town_hall_meeting_conducted_by_AMISOM_and_the_Somali_National_Police_Forces_at_the_Ministry_of_Information_in_Moga_dishu,_Somalia,_on_October_21._(15405353178).jpg)

Woman speaking at meeting (2) [https://commons.wikimedia.org/wiki/File:Community_reconciliation_meeting_\(8331341626\).png](https://commons.wikimedia.org/wiki/File:Community_reconciliation_meeting_(8331341626).png)

Two friends [https://commons.wikimedia.org/wiki/File:Good_Old_School_Friends_\(Unsplash\).jpg](https://commons.wikimedia.org/wiki/File:Good_Old_School_Friends_(Unsplash).jpg)

Students <https://www.flickr.com/photos/101561334@N08/10419003663/>

Computer user https://commons.wikimedia.org/wiki/File:Computer_with_microarray.jpg

Person being measured <https://www.flickr.com/photos/usnationalarchives/7136209363/>

Talking about deer <https://www.flickr.com/photos/snpphotos/6100360645/>

Conversation over fence https://commons.wikimedia.org/wiki/File:Camille_Pissarro_-_Conversation_-_Google_Art_Project.jpg

Watching TV https://commons.wikimedia.org/wiki/File:Family_watching_television_1958_cropped2.jpg

Knitting <https://www.flickr.com/photos/143348508@N07/30132465068/>

Ancient storyteller https://commons.wikimedia.org/wiki/File:Storyteller_Figure,_100-800_AD,_Jalisco,_Ameca_Valley,_Mexico,_ceramic_and_pigment_-_Art_Institute_of_Chicago_-_DSC00310.JPG

Rainbow <https://www.flickr.com/photos/diamondtdesign/39776875675/>

Safety pin <https://www.flickr.com/photos/glenbledsoe/30977033712/>

Smiling guy <https://www.flickr.com/photos/usdagov/40140865573/in/album-72157678551625258/>

People "sharing memorabilia" https://www.flickr.com/photos/usfws_alaska/42307225421/

People with perspectives (clockwise) https://www.flickr.com/photos/markred_flickr/43535740334/ https://commons.wikimedia.org/wiki/File:Bearded_man_with_long_hair-3052641.jpg
<https://www.flickr.com/photos/nationalarchives/5418304087/> https://commons.wikimedia.org/wiki/File:Girl_with_blue_eyes-3315767.jpg

Friends at cosplay convention <https://www.flickr.com/photos/animexrc/35595043050/>

"Woven" sculpture [https://commons.wikimedia.org/wiki/File:Woven_\(Unsplash\).jpg](https://commons.wikimedia.org/wiki/File:Woven_(Unsplash).jpg)

CHAPTER TWO: STORY FUNDAMENTALS

This chapter sets you up with some basic understandings you need to work with stories.

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[What are the best stories for story work?](#)

[How do stories flow in conversations?](#)

[How do stories flow in communities?](#)

WHAT IS A STORY?

When people say the word “story,” they mean many different things. These are some things I’ve heard people say:

“Once upon a time.
How’s that?”

“That’s my story, and
I’m sticking to it.”

(after telling a story)
“But that’s not a story! It
really happened.”

(after telling several stories)
“Sure, lots of things have
happened to me, but I don’t
have any stories to tell.”

So, what does the word “story” actually mean?

ONCE UPON A TIME

a group of blind travelers
encountered an elephant.

One traveler felt the elephant's trunk and said, "Watch out! It's a snake!"



Another felt the elephant's leg and said, "You're wrong. It's a tree."

A third traveler felt the side of the elephant and said, "You're both wrong. It's a boulder!"

That's how it is with stories.

(This story, by the way, is over 2000 years old.)

A STORY IS A MESSAGE

We tell stories to inform, explain, persuade, and entertain.

The best stories reach out and touch their audiences.



When we study **story form**, we think about how stories deliver their messages through carefully crafted settings, characters, and plots.

A STORY IS A TOOL

We tell stories to remember,
learn, teach, and imagine.

The best stories help us make
sense of our lives.



When we study **story function**, we think about how stories help us compare situations, explore possibilities, experiment with ideas, and decide what to do next.

A STORY IS A LINK

We tell stories to build relationships.

The best stories help us see through each other's eyes.



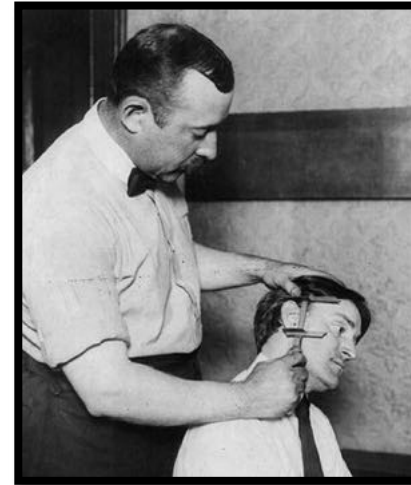
When we study **story phenomenon**, we think about how stories flow through families, groups, and societies.

EVERY DEFINITION OF “STORY” IS A STORY

What the word “story” means to you says as much about you as it says about stories.

“[Story] structure is a selection of events . . . composed into a strategic sequence to arouse specific emotions and to express a specific view of life.”

-- Robert McKee, Screenwriter



“When a prior experience is indexed cleverly, we can call it to mind to help us understand a current situation.”

-- Roger Schank, Cognitive scientist



“[T]he symbolic forms we call folklore have their primary existence in the action of people and their roots in social and cultural life.”

-- Richard Bauman, Anthropologist

A STORY IS A MESSAGE, A TOOL, AND A LINK

The three fundamental dimensions of story live together like siblings in a family.

Studying a story in all three dimensions can help us understand why it was told, what it means, what it can teach us, and where it needs to go.

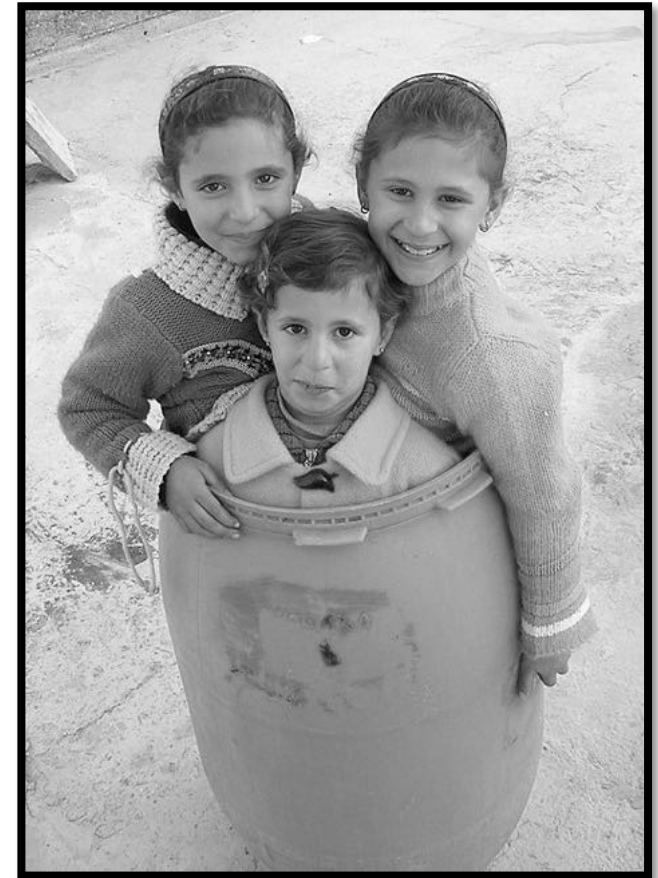


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Elephant https://commons.wikimedia.org/wiki/File:Blind_men_and_elephant.png

TV <https://commons.wikimedia.org/wiki/File:FamilyWatchingTV1958crop.jpg>

Computer [https://commons.wikimedia.org/wiki/File:Film_Optical_Sensing_Device_for_Input_to_Computers_\(FOSDIC\).jpg](https://commons.wikimedia.org/wiki/File:Film_Optical_Sensing_Device_for_Input_to_Computers_(FOSDIC).jpg)

Video phone [https://commons.wikimedia.org/wiki/File:Bell_telephone_magazine_\(1922\)_14569692698.jpg](https://commons.wikimedia.org/wiki/File:Bell_telephone_magazine_(1922)_14569692698.jpg)

Clapperboard <https://commons.wikimedia.org/wiki/File:Clapperboard.jpg>

Oral history interview <https://catalog.archives.gov/id/650161>

Measuring head <https://www.loc.gov/resource/cph.3a50148>

Three sisters https://commons.wikimedia.org/wiki/File:Thameen_three_sisters.jpg

WHAT ARE THE BEST STORIES FOR STORY WORK?

If there are all kinds of stories,
are they all equally useful in story work?
If not, which kinds of stories are best?

THE BEST STORIES FOR STORY WORK RECALL EVENTS IN **TIME.**

The best stories tell about events that took place **over a period of time.**



To be honest, I wasn't sure I was going to make it.



When I started this job ten years ago, I didn't know what I was doing.



But I did, and now I help new folks get started.

Facts, opinions, and statements exist **outside of time.** They are not as useful in story work.



I like my work. It can be hard. But I'm good at what I do, and I'm proud of that.

THE BEST STORIES FOR STORY WORK RECALL EXPERIENCES FROM PERSPECTIVES.

The best stories tell about things that happened to **specific people** in ways that reflect their points of view.



My grandmother started at the hospital in 1918, just three years after it was built. She was in maternity, but with the surge of flu patients, she took on a second job to help out. It was exhausting, but she was so proud of her work.

Recountings of events that happened to **nobody in particular** and that reflect no particular point of view are not as useful in story work.



The town of Eastville was founded in 1829. Its town hall was erected in 1878. The school followed in 1901, and the hospital opened its doors in 1915. Hundreds of lives were saved during the flu epidemic.

THE BEST STORIES FOR STORY WORK EXPRESS AUTHENTIC **EMOTIONS.**

When people feel safe, heard, and respected, they **reflect** on their experiences, and they **reveal** their feelings.



I wasn't sure if I would make it as a welder. It was daunting at first. But I like it. I like making useful things. It makes me feel like a useful person.

When people don't feel safe, heard, and respected, they **defend** their experiences, and they tell surface-level stories that **hide** their feelings.



I've been working here five years. Yeah, the work is okay. Sure, I like it. Yes, I am good at my job.

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Man operating machine [https://commons.wikimedia.org/wiki/File:Reconstruction_Training_School\(GN03933\).jpg](https://commons.wikimedia.org/wiki/File:Reconstruction_Training_School(GN03933).jpg)

Man teaching (pretend it's the same guy)

[https://commons.wikimedia.org/wiki/File:Reconstruction_Training_School\(GN03936\).jpg](https://commons.wikimedia.org/wiki/File:Reconstruction_Training_School(GN03936).jpg)

Man contemplating at work [https://commons.wikimedia.org/wiki/File:Reconstruction_Training_School\(GN03938\).jpg](https://commons.wikimedia.org/wiki/File:Reconstruction_Training_School(GN03938).jpg)

Nurse with baby https://commons.wikimedia.org/wiki/File:Nurse_with_baby,_Hutt_Hospital.jpg

Hospital doors (pretend it's the same hospital)

https://commons.wikimedia.org/wiki/File:Nurses%27_Home,_Bootle_Borough_Hospital_2.jpg

Woman with welding helmet https://www.flickr.com/photos/library_of_congress/51133577083/in/gallery-141423754@N05-72157698651036752/

Man pumping gas https://www.flickr.com/photos/library_of_congress/51132692057/in/album-72157719001848384/

(Note: None of these people said any of the things I wrote next to their pictures. They just seemed to have the right facial expressions to match the stories I made up.)

HOW DO STORIES FLOW IN CONVERSATIONS?

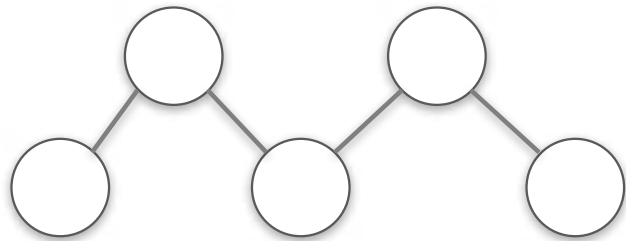
What happens when people tell each other stories?

What are the social dynamics of the situation?

If we want to help people share stories with each other,
what should we do to get stories flowing?

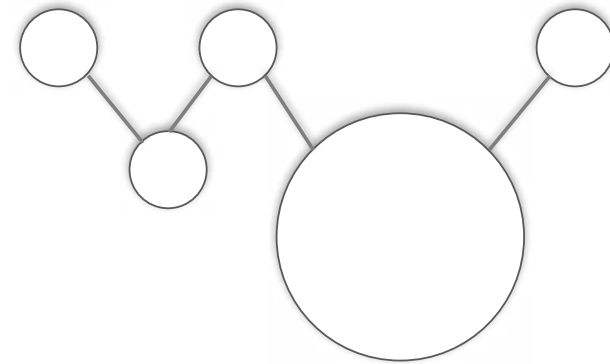
STORYTELLING CHANGES THE FLOW OF CONVERSATION

Everyday conversation has a tick-tock **turn-taking** rhythm.



Nice people try to keep things fair and equal.

When someone tells a story, they **hold the floor** for a longer period of time than usual.

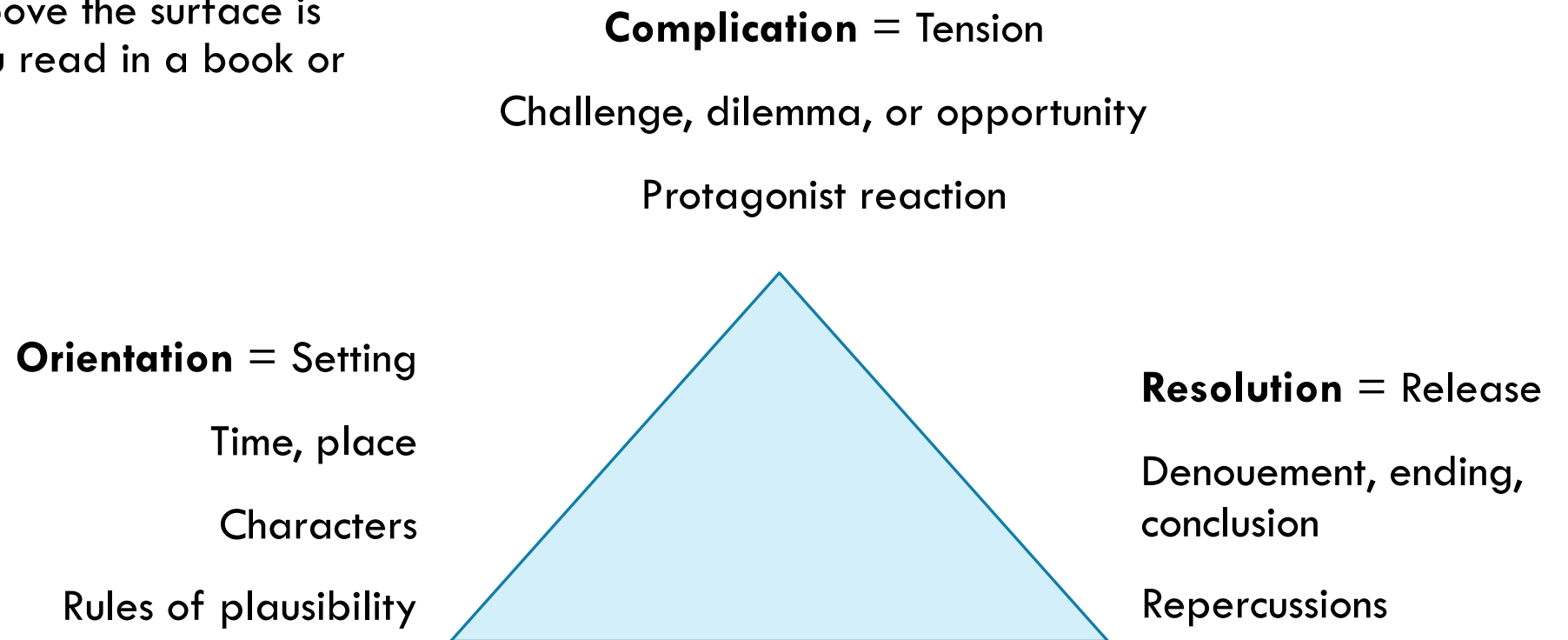


This is both a **privilege** and a **danger**. In social situations, where privilege meets danger, you find **ritual**.

THE SHAPE OF A CONVERSATIONAL STORY — ABOVE THE SURFACE

A story told in conversation is like an **iceberg**.

What you see above the surface is like any story you read in a book or see in a movie.



THE SHAPE OF A CONVERSATIONAL STORY - BELOW THE SURFACE

Below the surface of the story, the **storytelling event** creates waves of social negotiation that ripple:

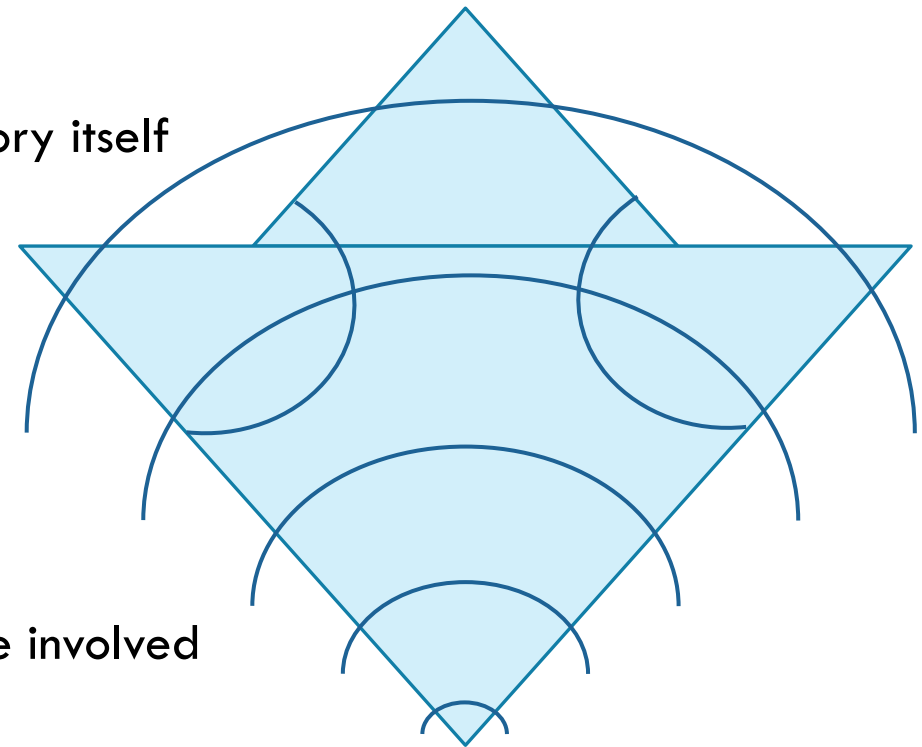
Up into the story itself

Out from the storytelling event:

Into the conversation

Into the relationships among the people involved

Into the culture in which they live



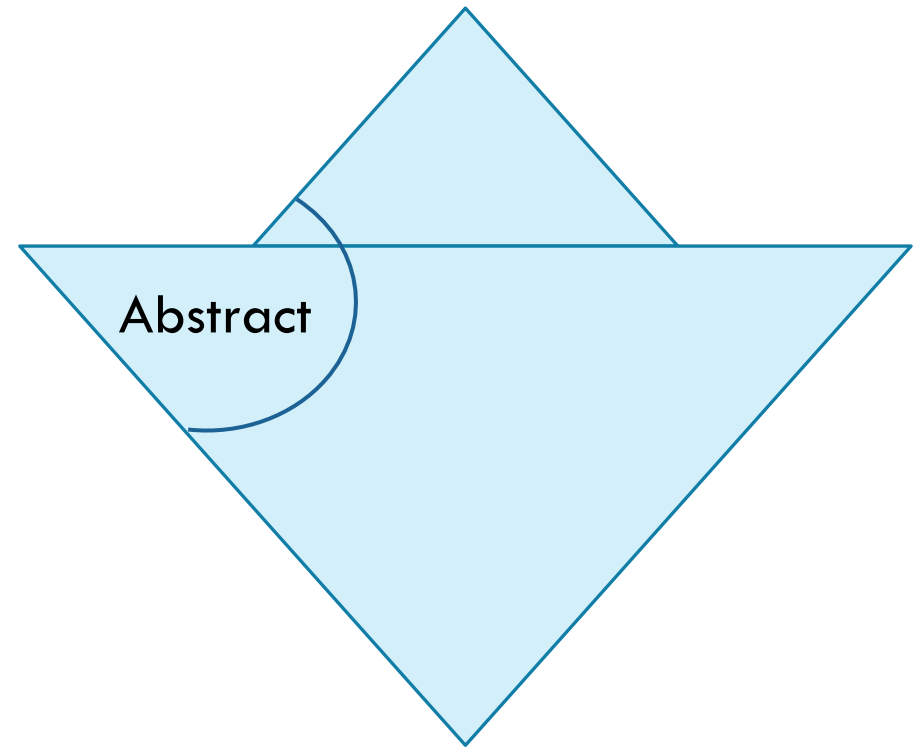
THE START OF A CONVERSATIONAL STORY

Every conversational story starts with an **abstract**, a request to hold the floor long enough to tell a story. Some typical abstracts are:

Offers Want to hear how I won this trophy?
Did I ever tell you about...

Formulaic story starters
Once upon a time...
I'll never forget when...

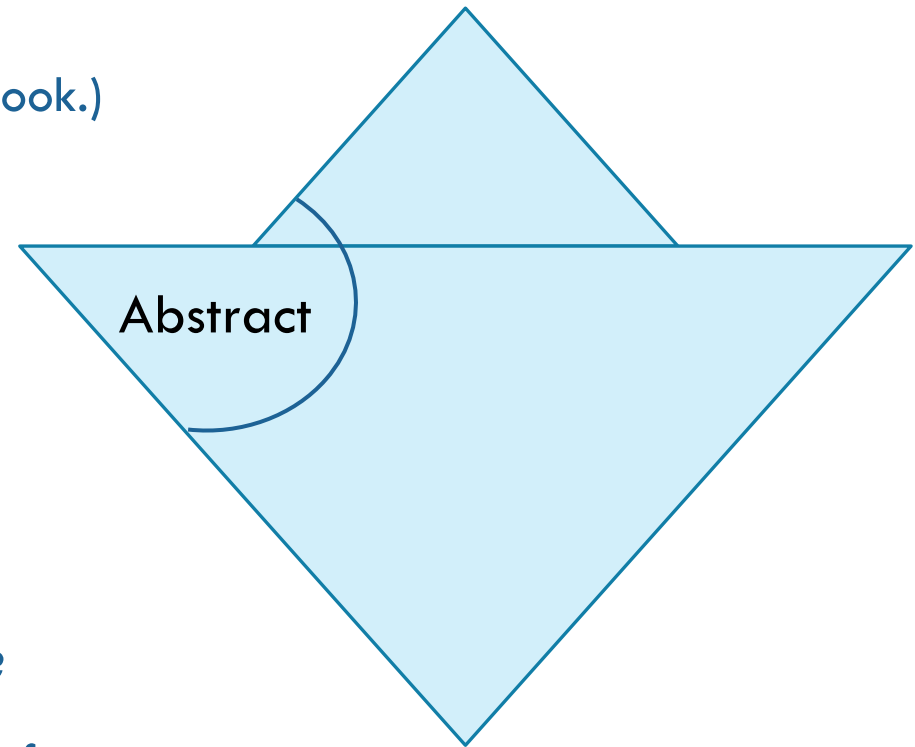
Times, people, places, things
When I was in high school...
My uncle was a character, I'll tell you...



AFTER THE ABSTRACT, NEGOTIATION

After the abstract is offered, a brief **negotiation** ensues.
The abstract can be:

Accepted as-is	Sure, go ahead. (Or a nod or look.)
Accepted with conditions based on	
Telling rights	Wait, I was there! We all got the same trophy.
Relevance in context	We're talking about football. Is this about football?
Rejected	What are we having for lunch?
And maybe offered again...	Wait, it <i>is</i> about football, sort of.



DO THEY TELL THE STORY NOW?

As the negotiation continues, the storyteller may **reframe** the story by:

Adjusting the story to suit the audience's requests or demands

I was on the team – yeah, okay, we were both on the team...

We started to play – sure, it wasn't football, it was baseball, but still...

Making a pitch for the story's value

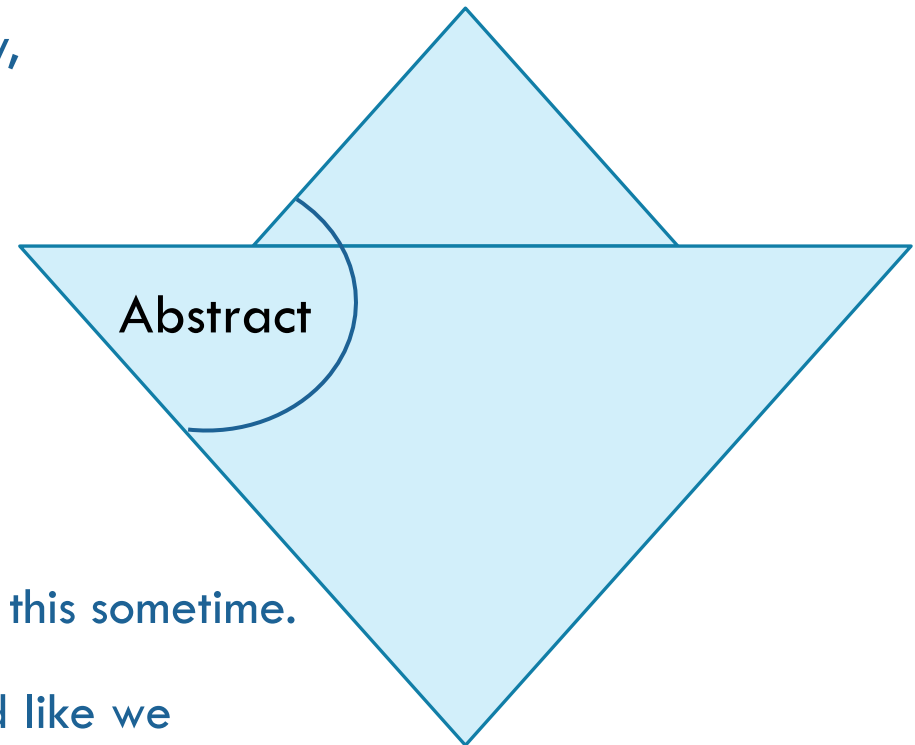
It really says a lot to me about perseverance, you know?

Appealing to authority

Joe said I should tell you about this sometime.

Trying out the story in miniature (like a movie trailer)

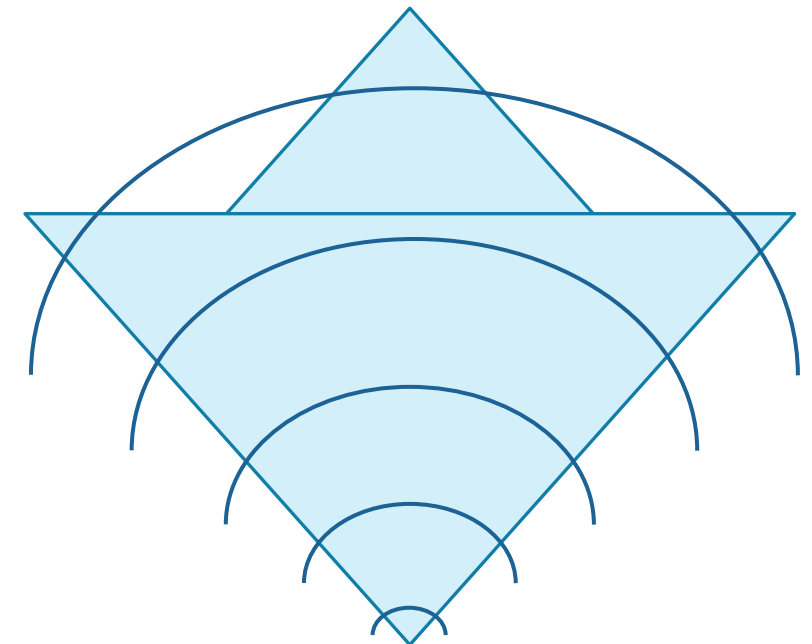
It's about a time when it looked like we were going to lose, but instead we won.



NOW THEY TELL THE STORY?

Yes. But as the story is being told, the storyteller keeps up a running commentary of **evaluation statements**: things people say that didn't actually happen in the story.

Repetitions	It was a <i>hundred</i> , I'm telling you, a hundred!
Emphases	I've <i>never</i> seen a baseball thrown that far.
Appeals to authority	Coach said he'd never seen anything like it.
Reported speech	He was like, " <i>Damn</i> , that's far."
Requests for feedback	Have you ever seen anything like that?



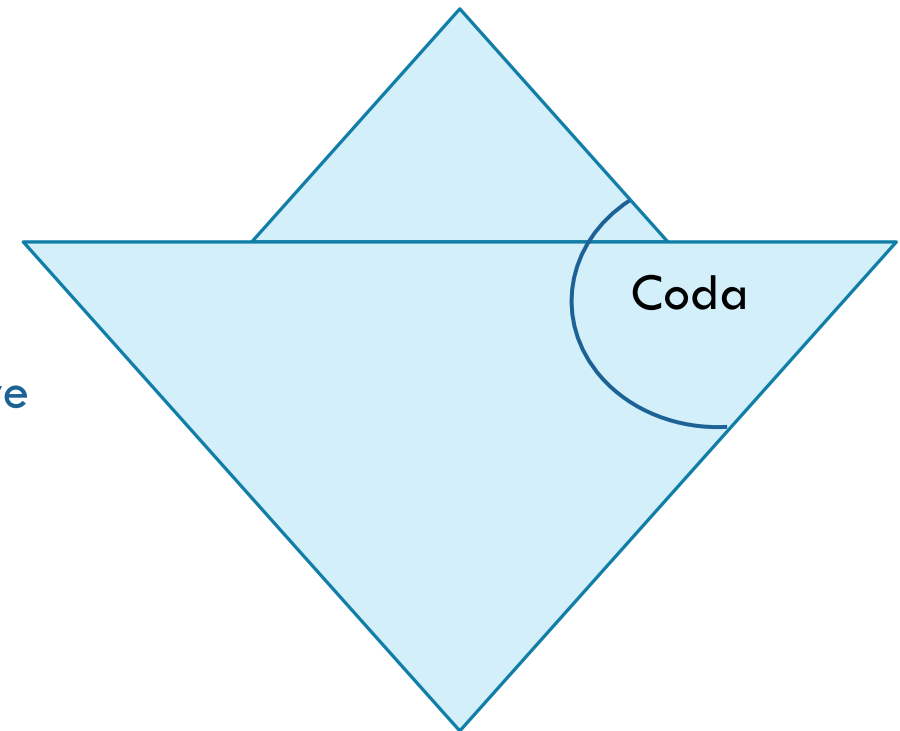
Evaluation statements

Why do we do this? To prove that the story is **worth hearing**, so the audience should continue to listen.

THE END OF THE STORY

The **coda** of a conversational story sums up the story (and the case for telling it) with:

Formulaic conclusions	And that's all she wrote!
Lessons or morals	I never forgot the lesson I learned that day.
The whole story again in miniature	And so we won! Even though we started out so badly.
More appeals to authority	I told my dad about it, and he was like, "That's <i>amazing</i> ."



BUT WHY?

Why do we surround storytelling with so much **ritual**?

Because sharing stories is like giving gifts. We wrap gifts in **wrapping paper**, and we wrap stories in negotiation. Both rituals serve the same purpose, which is to say:

I'm reaching out to you. I see that.

I'm vulnerable. I understand.

Please be kind. I will.

Now you do the
same for me.



If you want to help people tell stories, it helps to understand the ritual. And it helps to learn how you can play a part in making it work.

MORE RITUALS: RESPONSE STORIES

People often tell stories in response to other stories (“That reminds me of the time...”).

Telling a response story says:

I understand your experience

I have had experiences like that too

We are alike

We are **connected**

People in conversation often build long **chains** of response stories, usually without noticing it.

To extend the gift analogy, response stories are like **reciprocal gift exchanges**.



Watching people tell response stories, and (sometimes, when the time and context is right) telling response stories of your own can help people feel at ease when sharing stories.

MORE RITUALS: CO-TELLING

Co-telling is what happens when stories are told by more than one person (e.g., “I was there too, and this is what I saw”).

Co-told stories:

- show that **telling rights** belong to multiple people with multiple perspectives
- strengthen **connections** among co-tellers (even more than building story chains)

This ritual is somewhat like what happens when people “**go together**” on a gift.



When you see co-telling negotiations, you can support the ritual and prevent people from taking sole credit when in fact they share telling rights to the story.

IMAGE CREDITS

Rights: Public domain unless noted. Disclaimer: None of these people are actually doing or saying anything related to my words. I just look for situations and facial expressions that seem to match the messages I want to convey.

Gift <https://www.flickr.com/photos/139228535@N05/38517475904/>

Christmas card <https://www.flickr.com/photos/nsarchives/11222208036/in/faves-141143347@N08/>

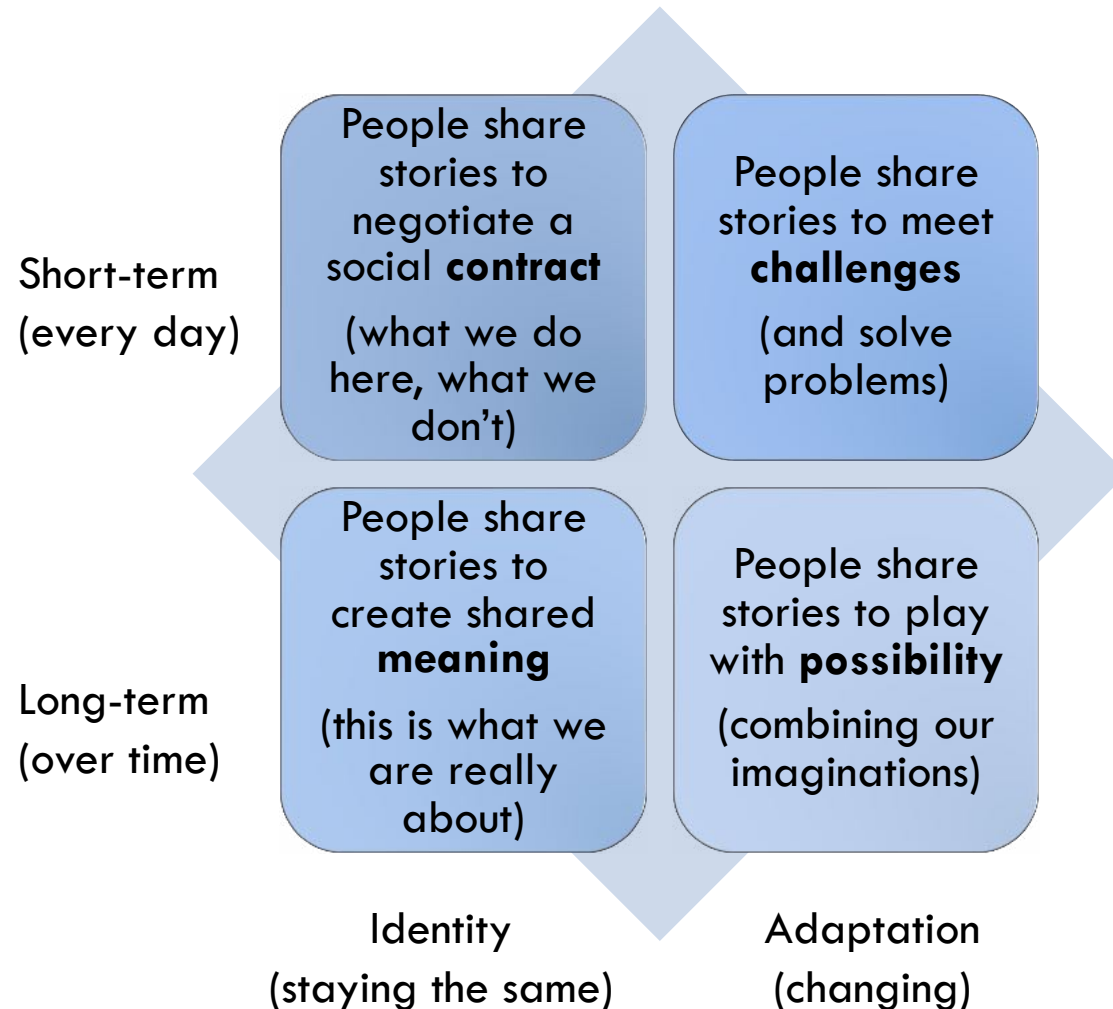
Co-telling https://upload.wikimedia.org/wikipedia/commons/2/2d/Mih%C3%A1ly_Munk%C3%A1csy_-_The_Story_of_a_Battle_-_Walters_3760.jpg

HOW DO STORIES FLOW IN COMMUNITIES?

What is the function of story sharing in families, teams, communities, and organizations? What does it look like when it's working well, and what does it look like when it's not?

If we want to help people in communities share stories, what should we do to support a healthy story-sharing culture?

WHY DO PEOPLE SHARE STORIES IN COMMUNITIES?



SIGNS OF A HEALTHY STORY-SHARING CULTURE

When story sharing is healthy:

- **Everyone** gets to tell stories
- Everyone gets to **finish** their stories
- But everyone has to **negotiate**

- People know **which stories** to tell when, where, and to whom

- People use stories to **account** for their actions and to **judge** others
- People use stories to make **decisions**



SIGNS OF AN UNHEALTHY STORY-SHARING CULTURE

When story sharing is unhealthy:

- Only some people get to tell stories
- Some stories get cut off or ignored
- Only some people have to negotiate

- People don't know which stories to tell when, where, and to whom
- Stories have no connection to accountability
- People use stories to divide



STORIES IN A HEALTHY STORY-SHARING CULTURE

When story sharing is healthy, it's easy to find:

- Response stories (That reminds me of...)
- Co-tellings (I was there too!)
- Retellings (I heard this from...)
- Elaborations (It was huge, I tell you!)
- Mistake stories (I messed up)
- Counter-stories (I heard different)
- Sacred stories (ones everybody knows)
- Condensed stories (short references to well-known stories)



STORIES IN AN UNHEALTHY STORY-SHARING CULTURE

When story sharing is unhealthy, the previously described types of stories are either **absent** or **twisted** into strange forms.

	Healthy	Unhealthy
Response stories are used for	empathetic connection	put-downs and one-upmanship
Co-tellings and re-tellings are used to	build connection	seize control
Elaborations are used to	play with possibility and have fun together	twist stories to suit other purposes
Mistake stories are used for	mutual support	power plays (about <i>other</i> people's mistakes)
Counter-stories serve to	challenge assumptions and prevent one viewpoint from dominating the conversation	silence those who disagree
Sacred and condensed stories	crystallize shared knowledge and beliefs	harden into dogmas

All of these things may happen **at the same time**, as waves of opposing forces collide and intermingle.

STORIES ARE PARADOXICAL

For every thing you can possibly say about stories, the opposite is also true.



Stories can tell the **truth**.

Stories can **help**.

Stories can **connect**.

Stories can **teach**.

Stories can **reveal**.

and

Stories can **lie**.

Stories can **harm**.

Stories can **divide**.

Stories can **confuse**.

Stories can **conceal**.



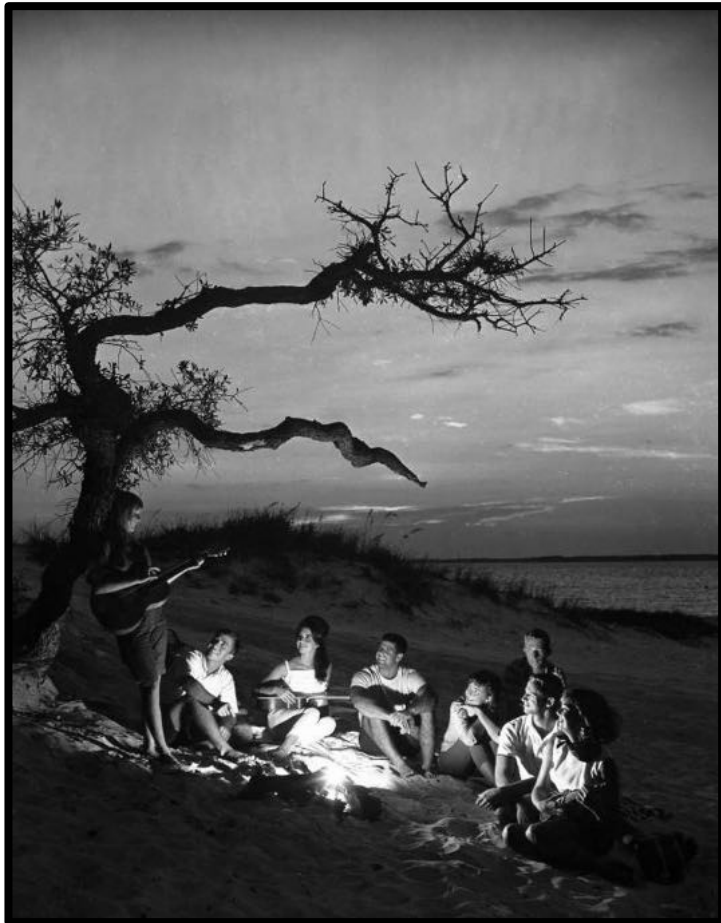
Stories are like fire, which warms and burns. Working with stories, like working with fire, requires that we pay attention to both sides of the picture.

WHEN DOES STORY SHARING HAPPEN? DURING COMMON QUIET SIMPLE TASKS



We might as well share stories **as we** spin, knit, weave, quilt, sew, cook, can, carve, whittle, etc. – or (more likely today) let's do those things while we share stories...

WHEN DOES STORY SHARING HAPPEN? DURING AFTER-PARTIES



In the **quiet time** after the big event, when the pressure is off, we can relax and simply connect.

WHEN DOES STORY SHARING HAPPEN? DURING MILESTONES



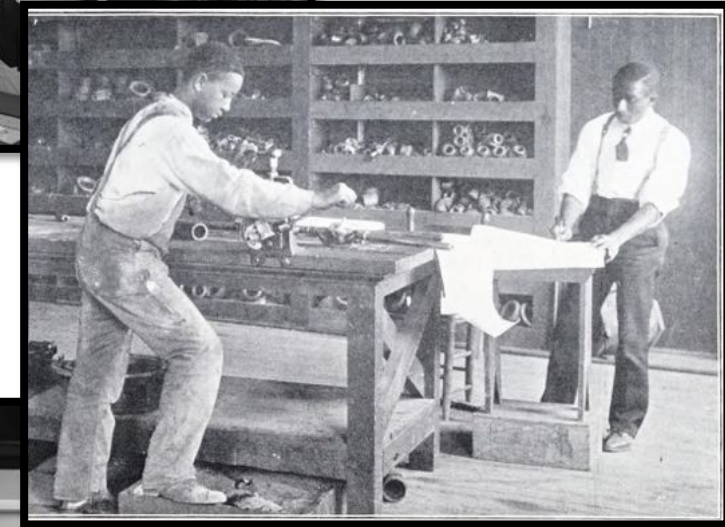
We mark important days by **looking back** into the past.

WHERE DOES STORY SHARING HAPPEN? IN PLACES OF RELAXED PURPOSE

A place of relaxed purpose is a place where people have something to do (get their hair cut, buy food, use tools, find a book), but also permission to linger and connect.

The purpose of the place creates a topic to discuss (hair, food, tools, books). And its owners or managers negotiate and maintain norms of behavior and responsibility. All of these elements favor story sharing.

In contrast are places in which people go to do things, but without permission to linger or negotiable norms: busy offices, police stations, courtrooms, hospital emergency entrances.



WHERE DOES STORY SHARING HAPPEN? IN MULTI-PURPOSE PLACES

People go to multi-purpose places for many reasons: to meet, plan, play, celebrate, eat, buy, and connect. Parks, sidewalks, porches, town squares, playgrounds, community markets, church halls, and community centers are all examples of multi-purpose places.

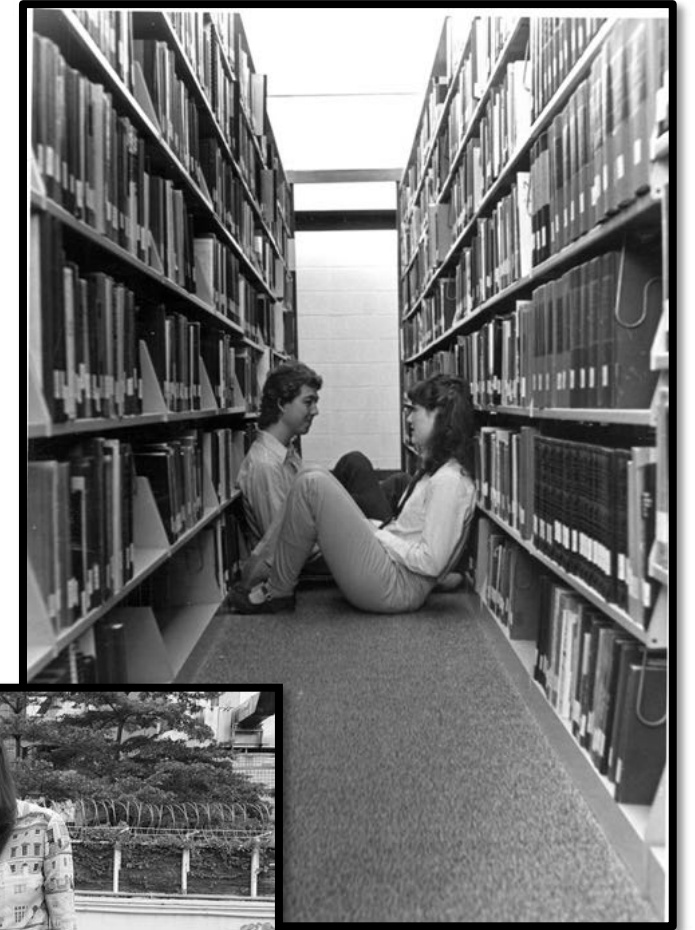
A multi-purpose place doesn't have a topic to discuss, but it does tend to have story-eliciting cues such as newspapers, signs, works of art, or memorabilia. And because these places tend to belong to everyone, people negotiate behavioral norms within them.



WHICH PLACE IS WHICH?

Any particular place could be a place of relaxed purpose for one person or group and a multi-purpose place for another. Or a place could morph from one type into the other as a community changes.

For story sharing, the important distinction is between either of these places and places where there is no time, no space, or no permission to share stories; nothing in particular to talk about; and either no process or a non-negotiable process for determining behavioral norms.

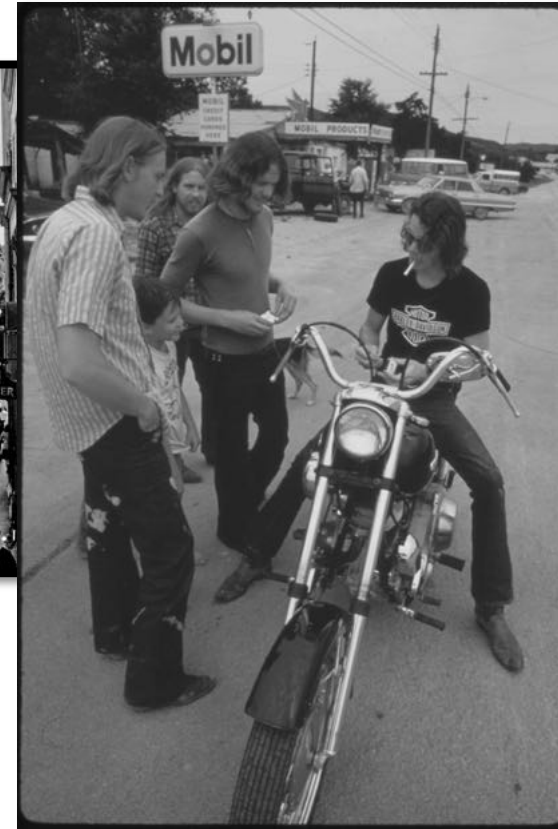


WHERE DOES STORY SHARING HAPPEN? AT INVITING AND IMPROVISED EDGES



Inviting

Edges are places between places, where people **bump into each other** and stop to chat. Inviting and improvised edges support story sharing; lifeless edges do not.



Improvised



Lifeless

TO SUPPORT COMMUNITY STORY SHARING, ASK:

When do people share stories in this community?

When are the common quiet simple tasks? When are the after-parties? The milestones?

What can you do to encourage story sharing during these times?



Where do people share stories in this community?

Where are the places of relaxed purpose? Where are the multi-purpose places?

Where are the edges? Which are inviting, improvised, and lifeless? If there are lifeless edges, how could they change?

What can you do to increase story sharing in these places?

IMAGE CREDITS

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People sharing stories <https://www.flickr.com/photos/lselibrary/6960859488>

Person alone <https://www.flickr.com/photos/gregotasios/17184186176/>

Men talking https://www.flickr.com/photos/library_of_congress/2178352223

Hearth <https://www.flickr.com/photos/comedynose/4212985327/>

House fire <https://www.flickr.com/photos/srahn/5063113702>

Men knitting https://commons.wikimedia.org/wiki/File:Taquilenos_knitting.jpg

Women canning <https://www.flickr.com/photos/mennonitechurchusa-archives/6920910935>

Women spinning <https://www.flickr.com/photos/proni/13582351285/>

Campfire <https://www.flickr.com/photos/floridamemory/15651411477/>

Kids in group <https://www.flickr.com/photos/mennonitechurchusa-archives/9188320360/>

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Workshop https://commons.wikimedia.org/wiki/File:Steam-Fitting_Shop,_Tuskegee_Institute.jpg

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Town park <https://www.flickr.com/photos/alanstanton/15080619725/>

Basketball game https://www.flickr.com/photos/center_for_jewish_history/4575515083/

Town square https://www.flickr.com/photos/swedish_heritage_board/13927730090/

Community garden https://www.flickr.com/photos/ait_taipei/19721981829/

Library <https://www.flickr.com/photos/mennonitechurchusa-archives/6987811982>

Inviting edge <https://www.flickr.com/photos/nlireland/12047327903/>

Improvised edge <https://www.flickr.com/photos/usnationalarchives/3704383536/>

Uninviting edge <https://www.flickr.com/photos/epicantus/15356305668/>

Man sharing story https://www.flickr.com/photos/usfws_alaska/42306841261/

CHAPTER THREE: FUNDAMENTALS OF PARTICIPATORY NARRATIVE INQUIRY

This chapter introduces you to the concepts, methods, connections, and principles of Participatory Narrative Inquiry.

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[What happens in a PNI project?](#)

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[What are the principles of PNI?](#)

WHAT IS PNI? AND WHAT IS ITS HISTORY?

This is a definition of PNI from the book *Working with Stories*.

Let's go through it one phrase at a time.

PNI is an approach in which groups of people participate in gathering and working with raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI? AND WHAT IS ITS HISTORY?

PNI focuses on **groups**: families, teams, communities, organizations. It is rarely used to help individuals.

The approach described in this book began its life at IBM Research in 1999, though it was not called PNI (or anything else) until 2010. It began with a focus on organizational learning, knowledge management, and decision support. Over time it expanded to apply to communities and to other purposes.

PNI is an approach in which **groups of people**

participate in gathering and working with raw stories of personal experience to make sense of complex situations for better decision making.

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WHAT IS PNI?

AND WHAT IS ITS HISTORY?

The term “participatory narrative inquiry” has been in use – in the general sense of “narrative inquiry that is participatory” – since at least the 1990s. This approach differs in many small details from the work that came before it, but the overall spirit is the same.

“This qualitative study described nurses' moral orientations and epistemological perspectives in lived experiences of moral conflict in nursing practice and evaluated the usefulness of a participatory narrative approach to data collection and analysis.”

-- Participatory narrative inquiry into nurses' moral orientations and ways of knowing, Parker, Randy Spreen. University of Illinois at Chicago, Health Sciences Center ProQuest Dissertations Publishing, 1996.

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WHAT IS PNI?

AND WHAT IS ITS HISTORY?

As a subset of **Action Research**, PNI is a participatory approach, not an extractive one. There are no experts in PNI, only participants and facilitators.

This choice and connection was made in the first two years of the work.

Action research is a philosophy and methodology of research [that] seeks transformative change through the simultaneous process of taking action and doing research, which are linked together by critical reflection.

Wikipedia

https://en.wikipedia.org/wiki/Action_research

PNI is an approach in which groups of people **participate** in

gathering and working with raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI focuses on collecting a **diverse** body of stories, from dozens to thousands, never just a few.

PNI developed over the course of dozens of consulting projects, large and small, for a variety of corporate and government clients. The topics these clients wanted to explore were mainly topics on which there were diverse (often conflicting) perspectives. These circumstances shaped the way the approach developed.

PNI is an approach in which groups of people participate in **gathering** and

working with raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI focuses on **working with** stories: talking about them and learning from them. It places more emphasis on **discovery** than on preservation or presentation.

This is due to the focus of the work that led to PNI: applied research for practical benefit.

PNI is an approach in which groups of people participate in gathering and **working with**

raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI focuses on stories told simply, in **everyday** language, without adornment or improvement.

Over the course of many projects, we learned – often the hard way – that respecting participants and their stories; avoiding judgment, intimidation, and bias; and ensuring transparency produces better outcomes for everyone.

PNI is an approach in which groups of people participate in gathering and working with **raw stories** of

personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI is an approach in which groups of people participate in gathering and working with raw stories of **personal experience** to

PNI focuses on each participant's unique **perspective** on their own lived experiences.

make sense of complex situations for better decision making.

People know more about their own stories than any expert can hope to guess. This essential principle of PNI was discovered through years of trial and error.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI is an approach in which groups of people participate in gathering and working with raw stories of personal experience to **make sense** of

PNI focuses on group **sensemaking** rather than measurement or proof.

The goal of PNI has always been to support collective learning and decision making.

complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

“Sensemaking is the process by which people give meaning to their collective experiences ... [it is] a process that allows people to understand ambiguous, equivocal or confusing issues or events.”

Wikipedia

<https://en.wikipedia.org/wiki/Sensemaking>

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI is an approach in which groups of people participate in gathering and working with raw stories of personal experience to make sense of **complex situations** for better decision making.

PNI focuses on **complex**, messy, many-sided, and often contentious situations.

The topics clients wanted to explore during the development of PNI were mostly difficult and contentious topics.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI is an approach in which groups of people participate in gathering and working with raw stories of personal experience to make sense of complex situations for better **decision making**.

The ultimate goal of PNI is to help diverse groups of people make better **decisions** together, decisions everyone can live with.

This again goes back to the original research mandate to support organizational learning and decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

PNI's attention to patterns among stories developed over years of exploration and experimentation.

PNI focuses on **deep exploration**, not surface-level attention. Exploration happens primarily through thinking and talking about **patterns** that form among stories and answers to reflective questions.

PNI is an approach in which groups of people participate in gathering and working with raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the **profound** consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

WHAT IS PNI?

AND WHAT IS ITS HISTORY?

This was another hard-won set of learnings from years of project work.

PNI focuses on how people **feel** about what has happened to them and what they think it **means**, not simply the facts of what happened.

PNI is an approach in which groups of people participate in gathering and working with raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of **values, beliefs, feelings, and perspectives**

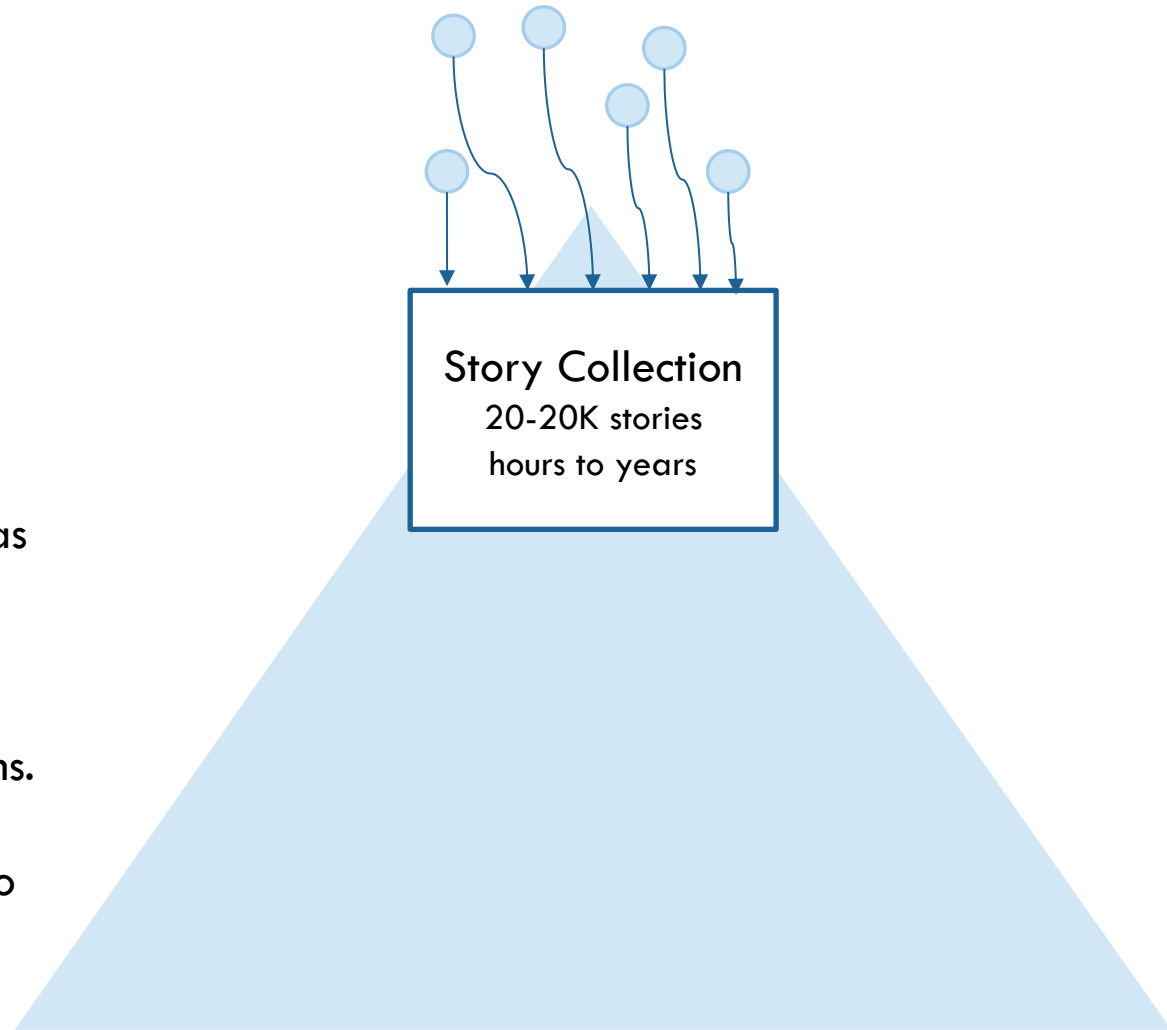
through the recounting and interpretation of lived experience.

WHAT HAPPENS IN A PNI PROJECT?

A PNI project can range from three people talking for an hour to thousands of people interacting for years. But every PNI project has **three essential phases**.

These three phases take place every time people share stories in everyday conversations. In PNI, they are carried out with deliberate attention and with concerted effort in order to achieve a common goal.

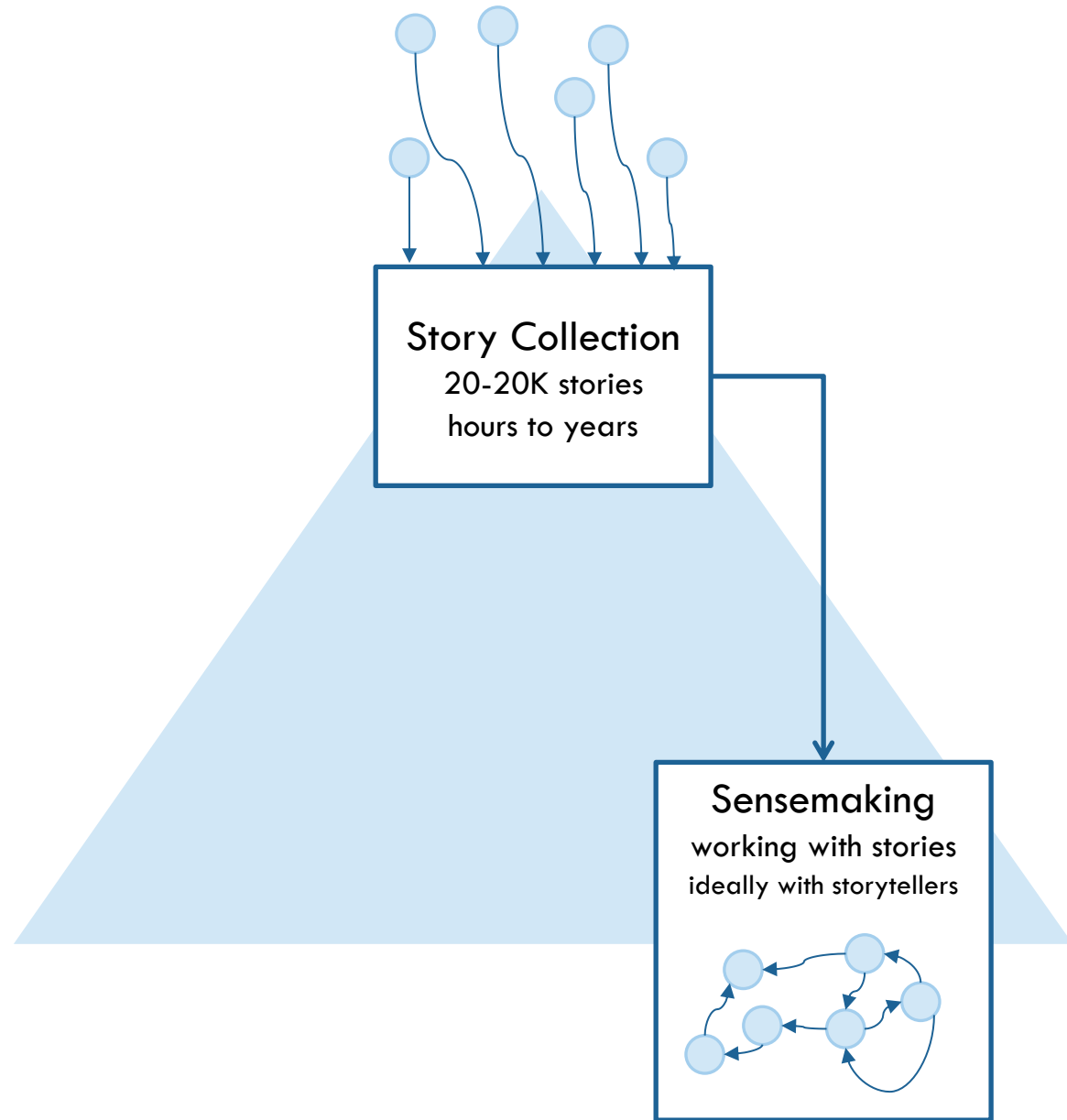
In the first phase of a PNI project, stories are **gathered together**. People talk, and people listen.



WHAT HAPPENS IN A PNI PROJECT?

In the second essential phase of PNI, people **make sense** of the stories that have been gathered together. Discussions take place; patterns emerge; discoveries are made; opinions are expressed; perspectives are explored; insights arise; actions are proposed.

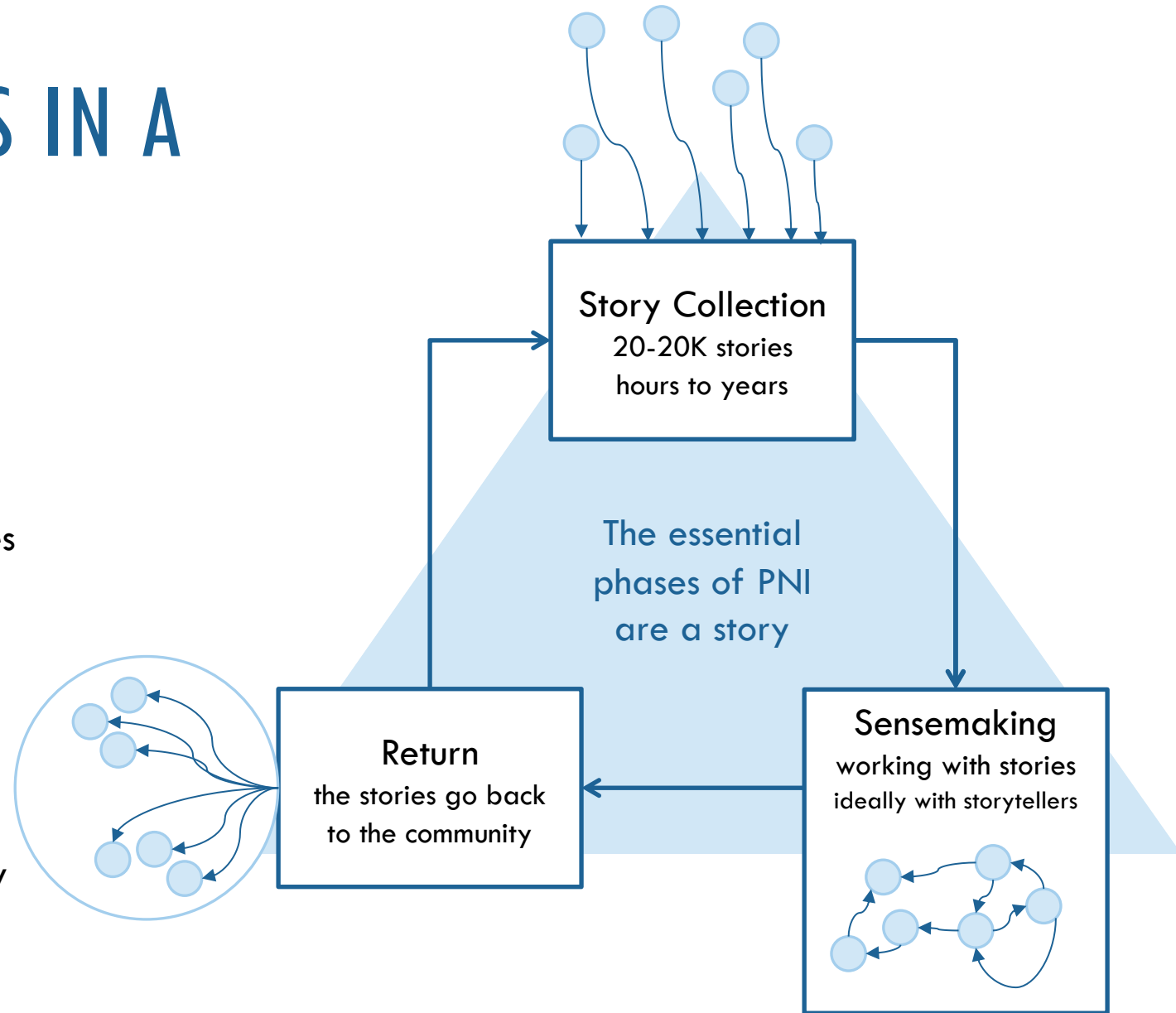
Ideally, all of the people who told the gathered stories are present in the sensemaking phase. This ideal may not always be possible in practice, but it is always worth striving towards.



WHAT HAPPENS IN A PNI PROJECT?

In the third essential phase of PNI, the stories **return** to the people and to the community in some way. Project participants might pass on some of the stories they heard or told to other people. Or they might simply remember the stories and think about them as time goes by.

At a higher level, **every PNI project is a story**, and that story also returns to the community, to be told and heard and made sense of in the times to come.

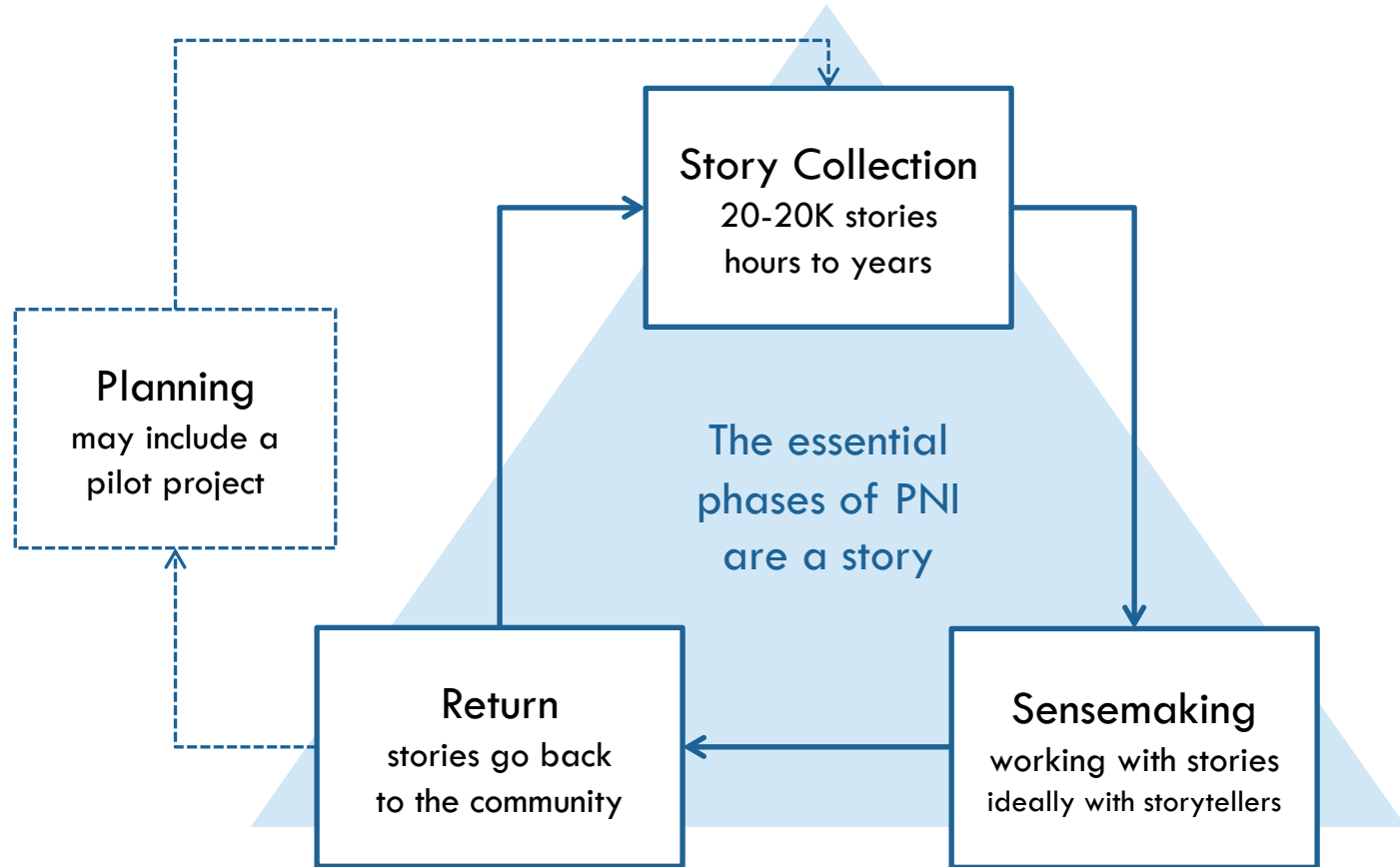


WHAT HAPPENS IN A PNI PROJECT?

There are three optional phases in any PNI project. Some projects include them; some do not.

The first optional phase is **planning**. When a project is large or ambitious, it is wise to take some time to consider your options and test your plans.

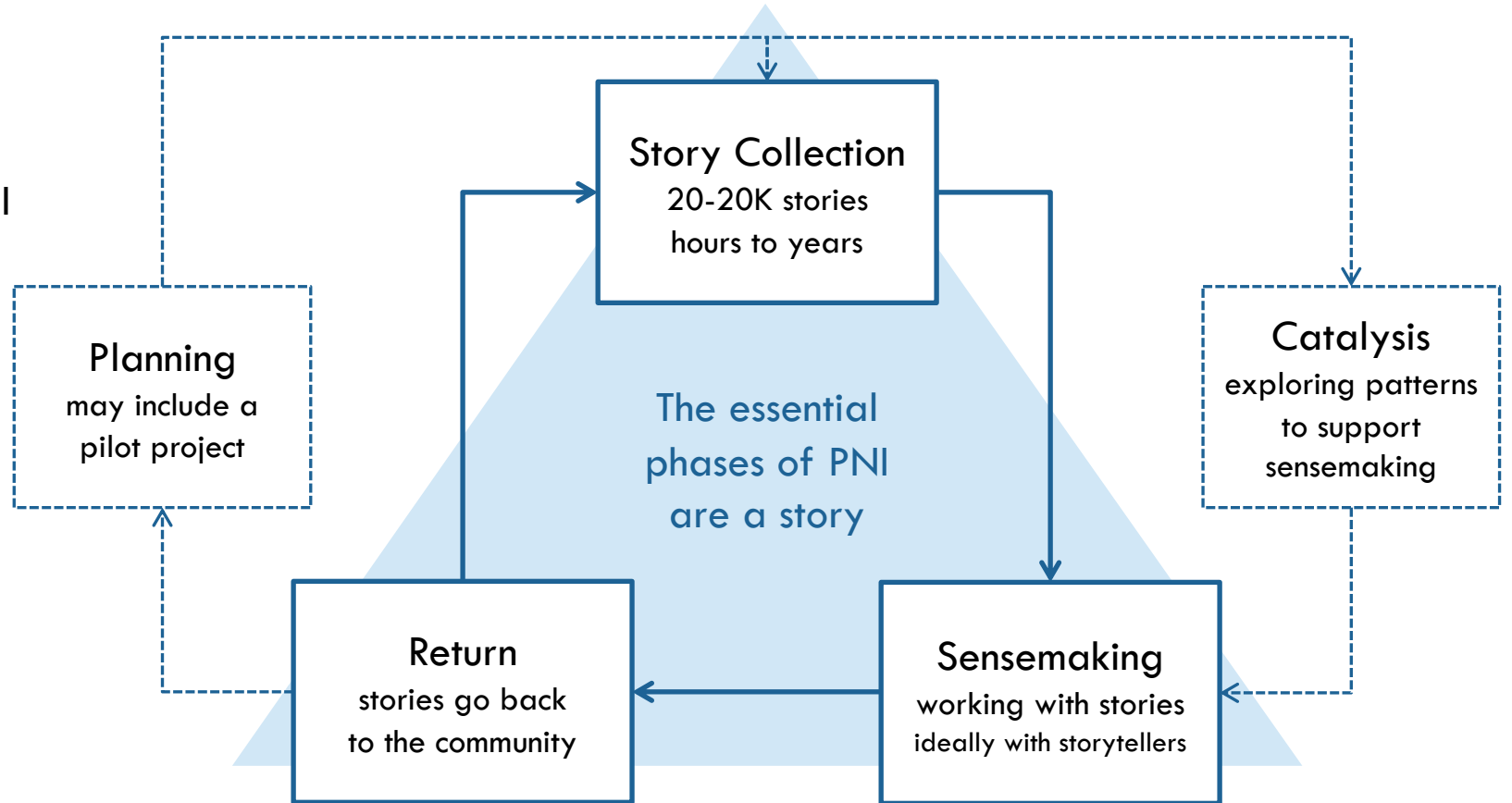
A large PNI project may include a **pilot project** – a small but complete project nested inside the planning phase of the larger project.



WHAT HAPPENS IN A PNI PROJECT?

The second optional phase of PNI is **catalysis**. In this phase, people (usually researchers, but sometimes participants) use the techniques of **mixed-methods research** to look for **patterns** in the collected stories and answers to questions about them.

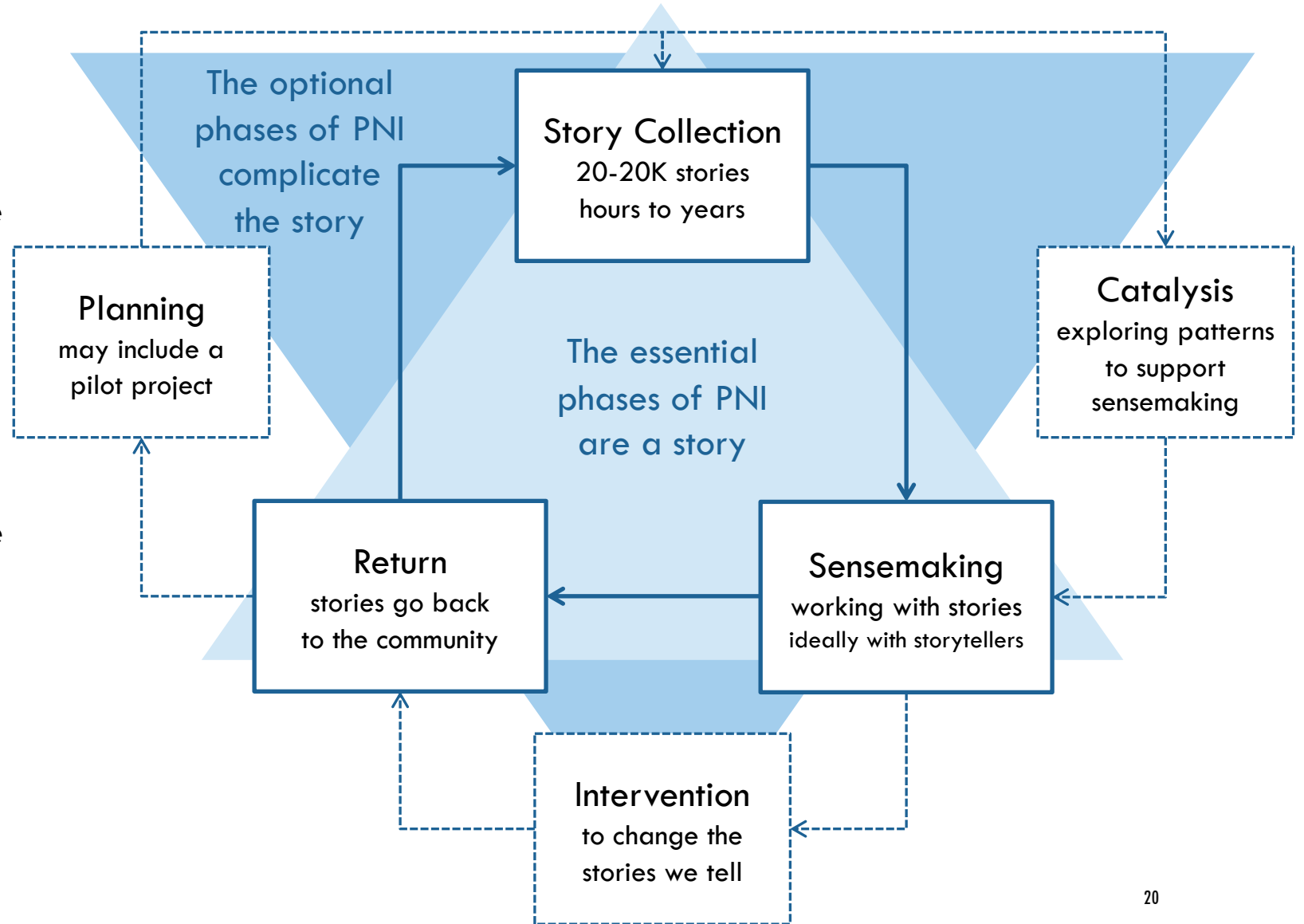
Unlike analysis, which presents definitive answers, catalysis prepares a sort of multi-perspective **game** that enhances exploration in the sensemaking phase of PNI.



WHAT HAPPENS IN A PNI PROJECT?

The third optional phase of PNI is **intervention**, in which someone takes some action to **change** the stories of the community. Ideas for intervention often emerge during sensemaking.

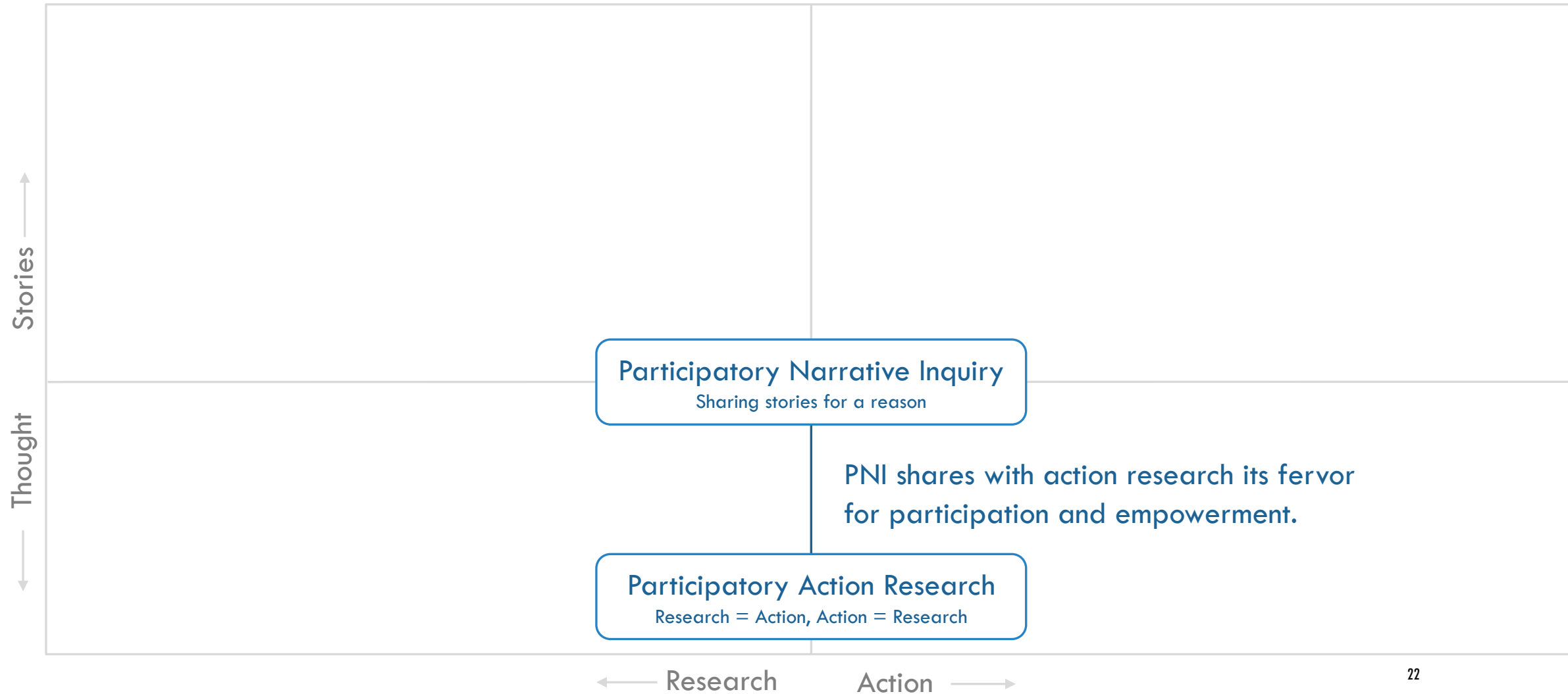
PNI projects sometimes use the intervention phase to incorporate more **action-oriented** approaches. For example, a PNI project could include a nested project that uses narrative therapy, participatory theatre, or Appreciative Inquiry.



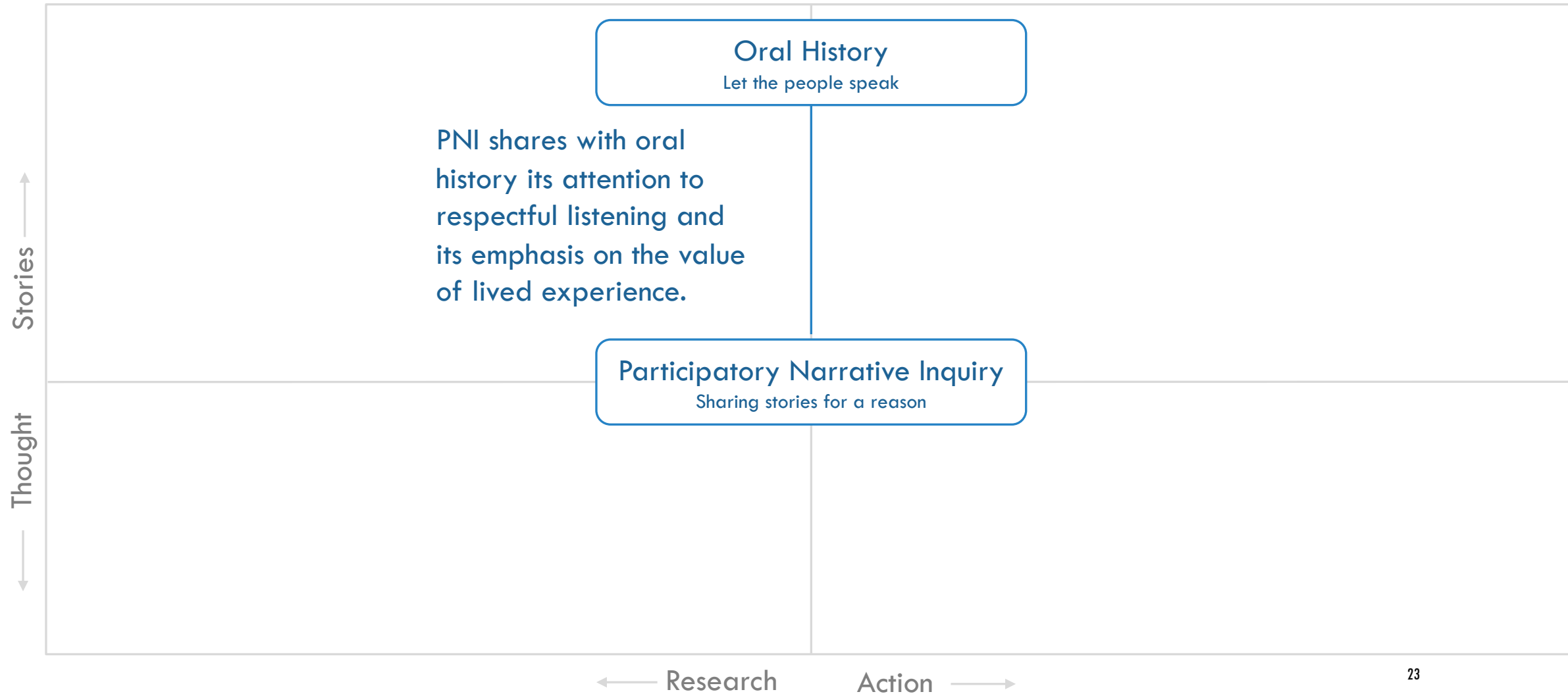
HOW DOES PNI CONNECT TO OTHER FIELDS?



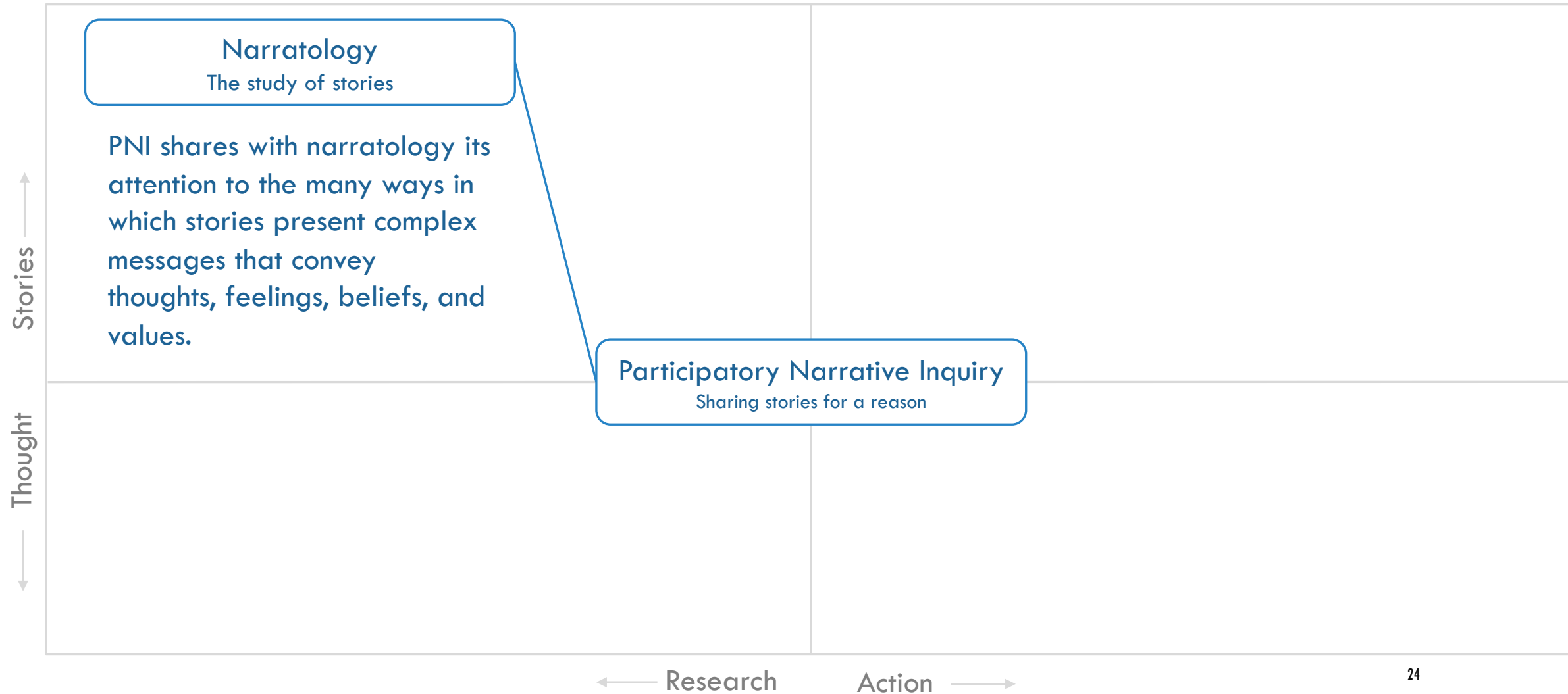
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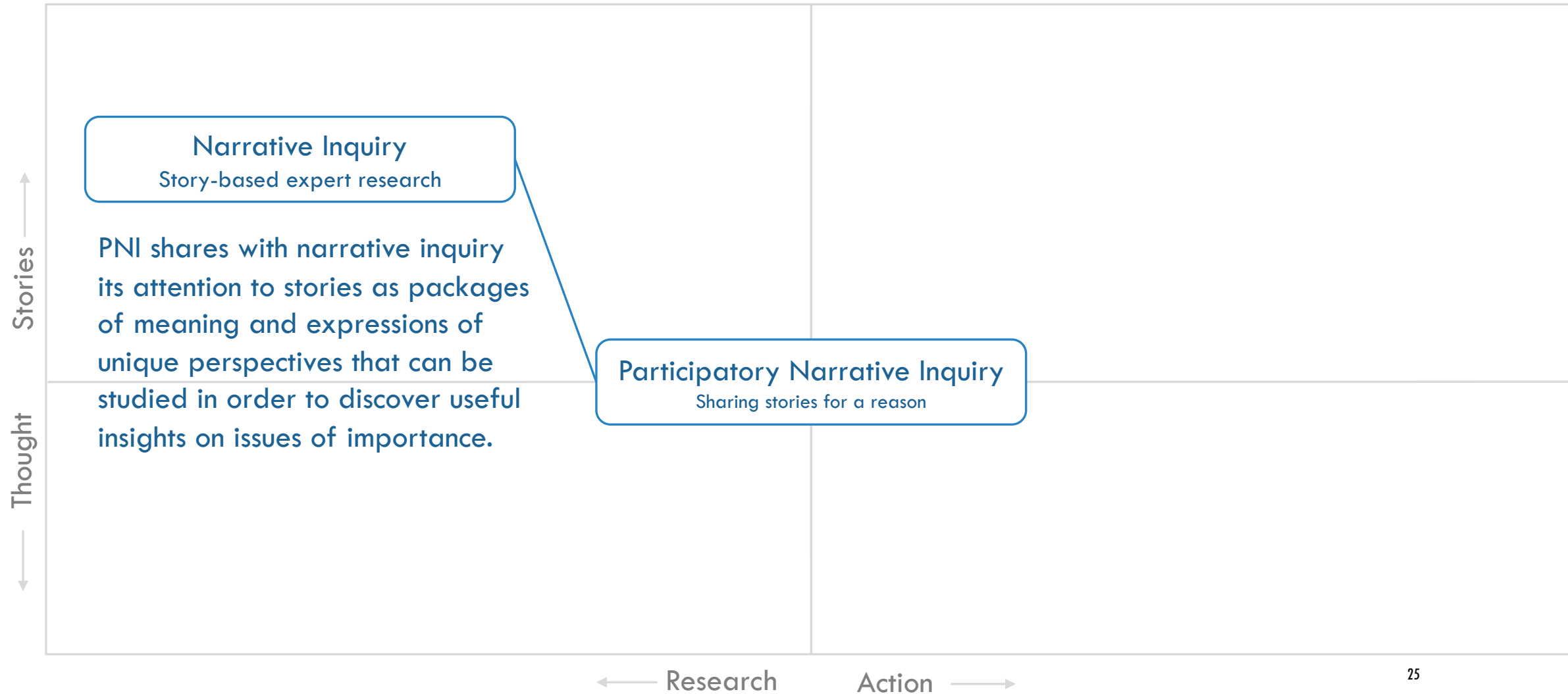
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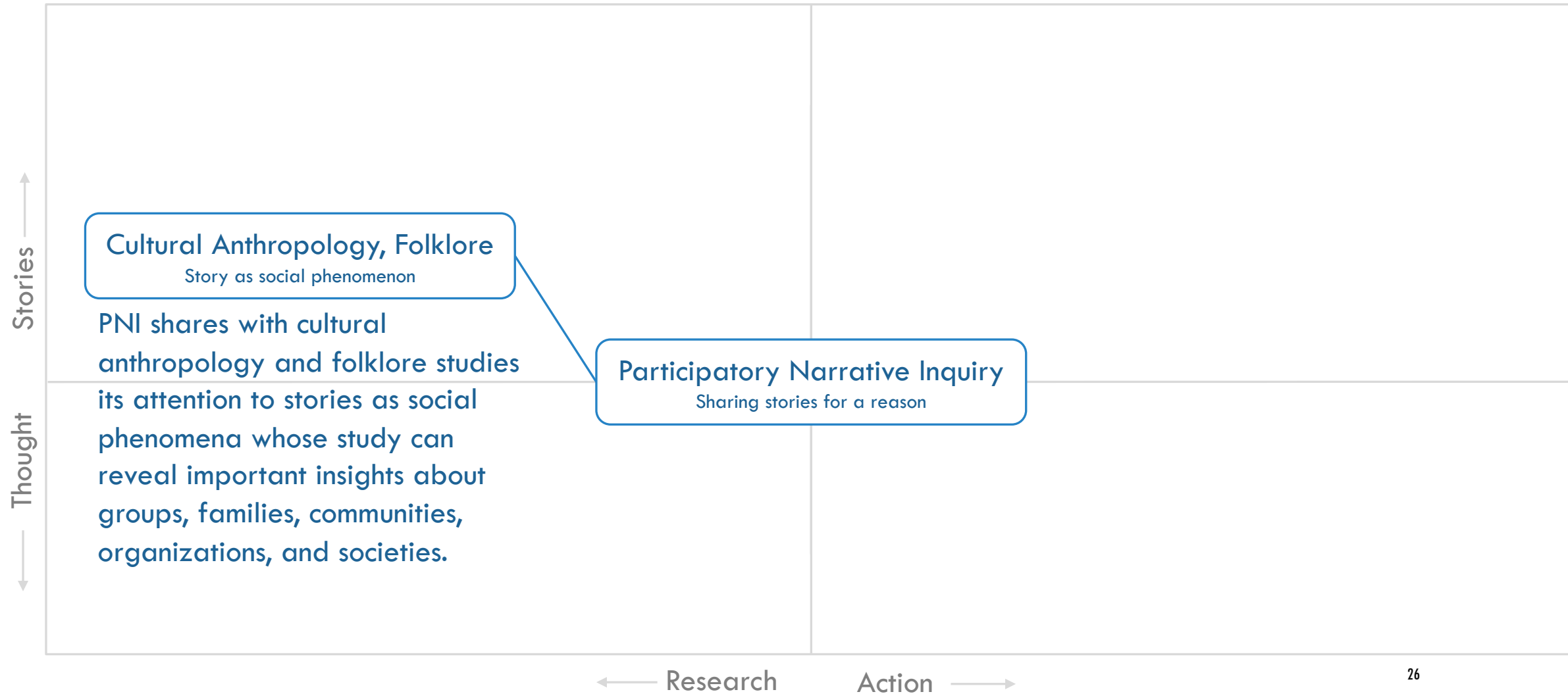
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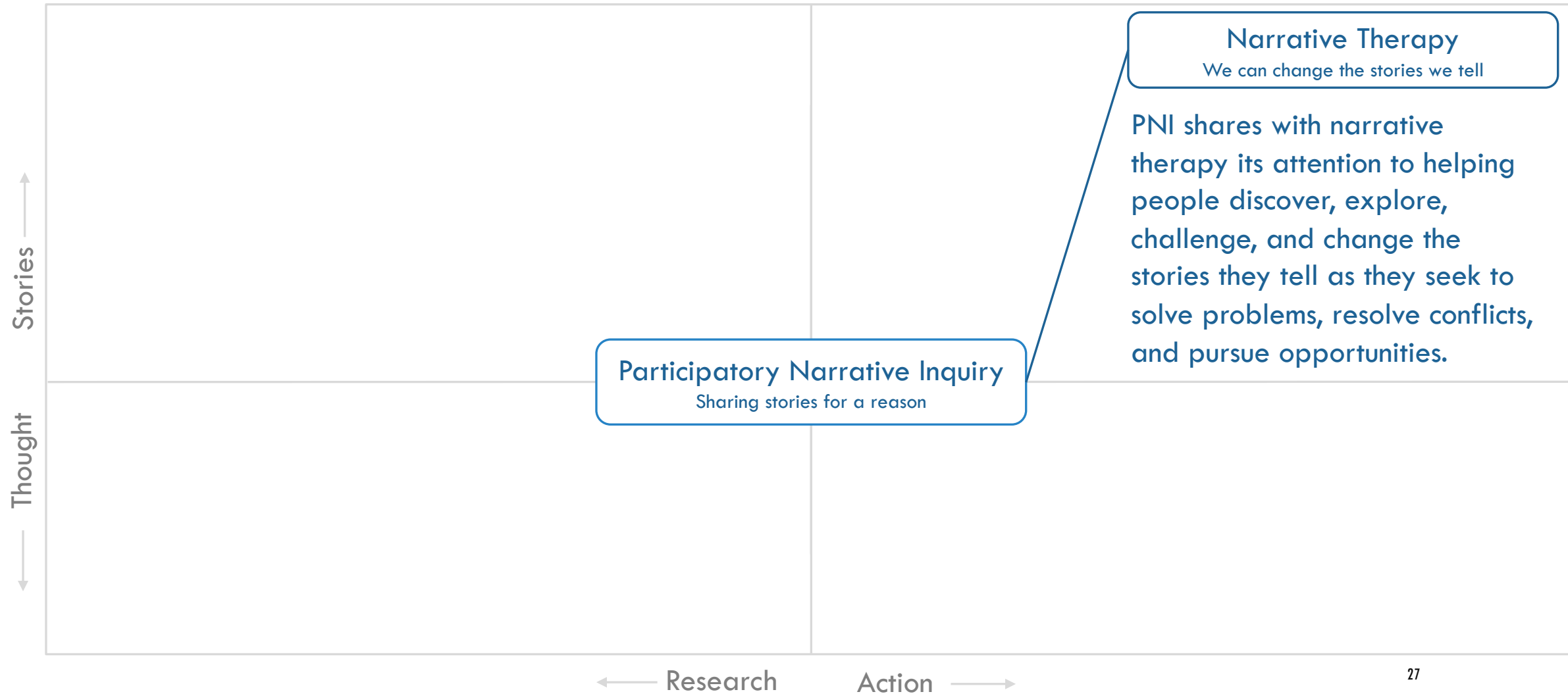
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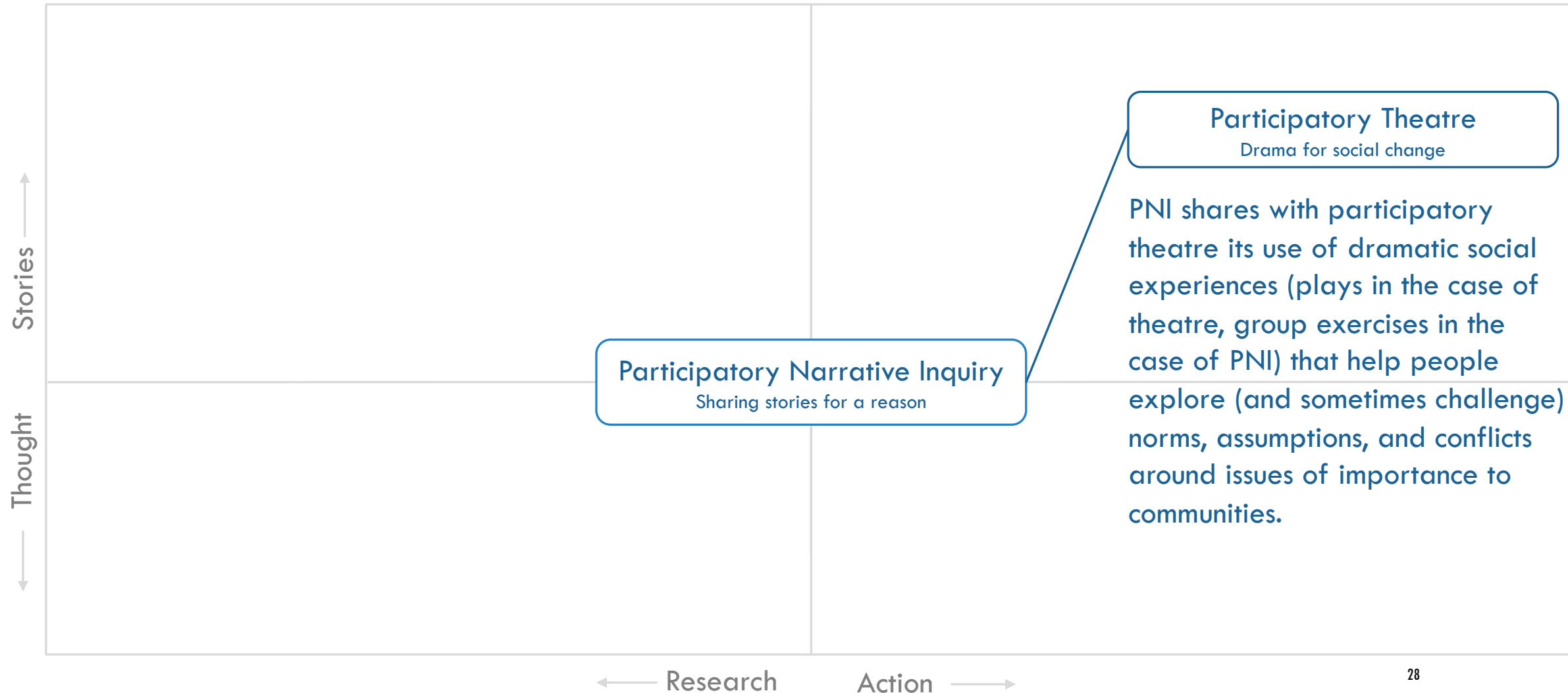
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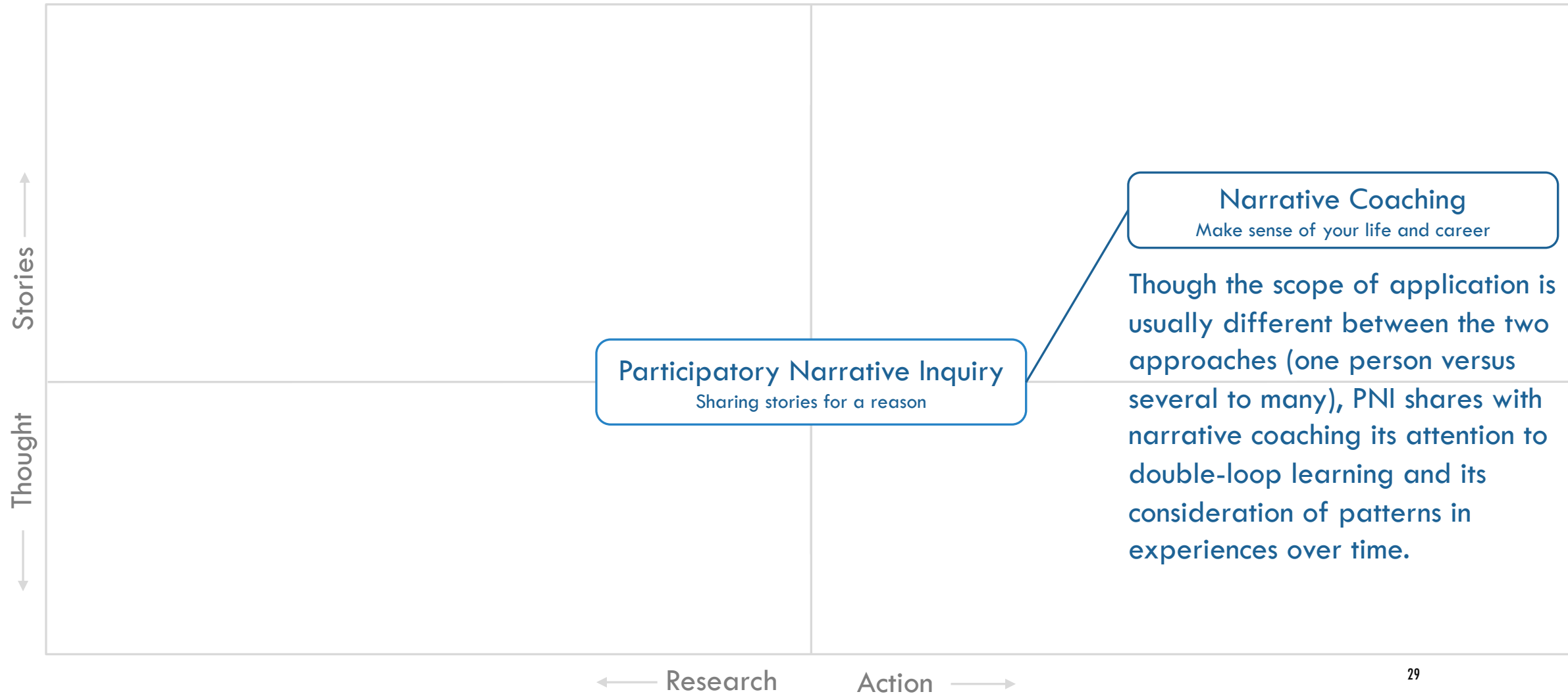
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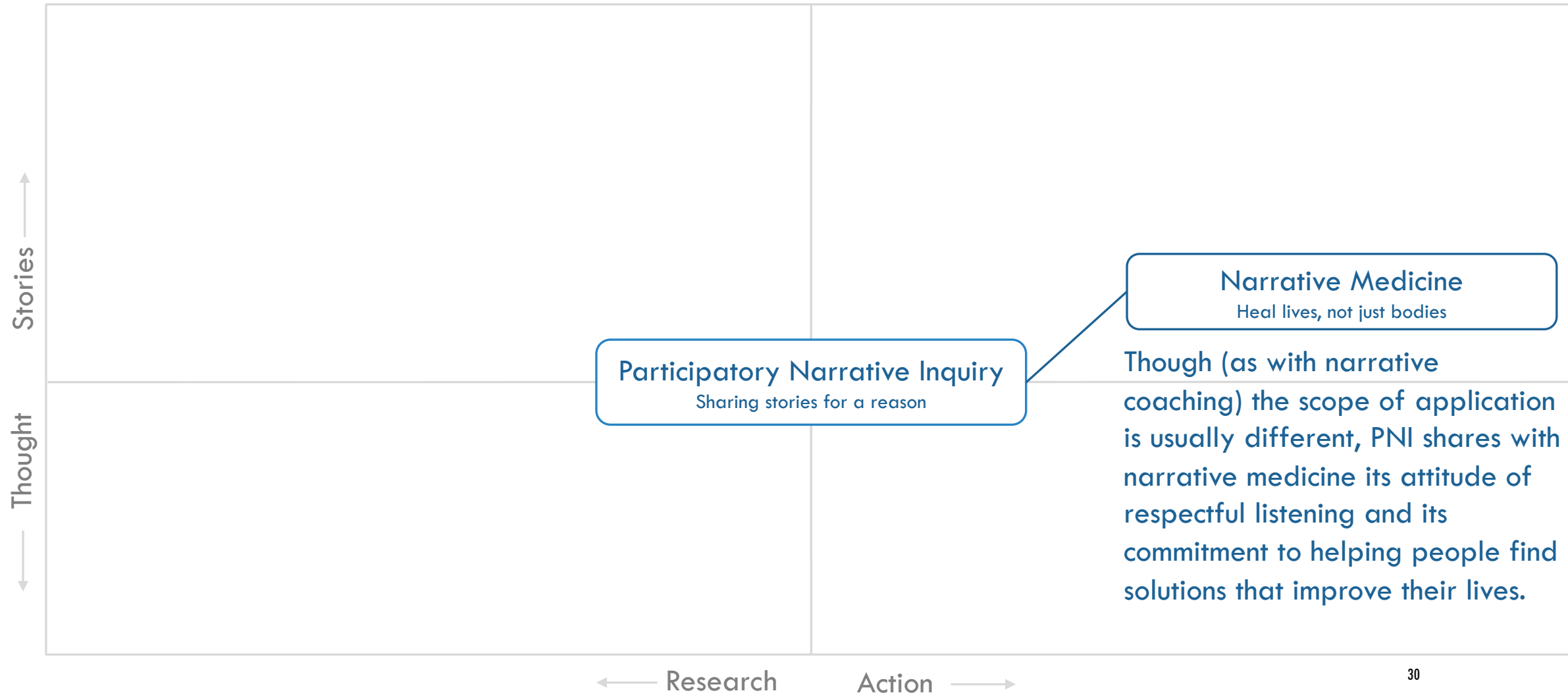
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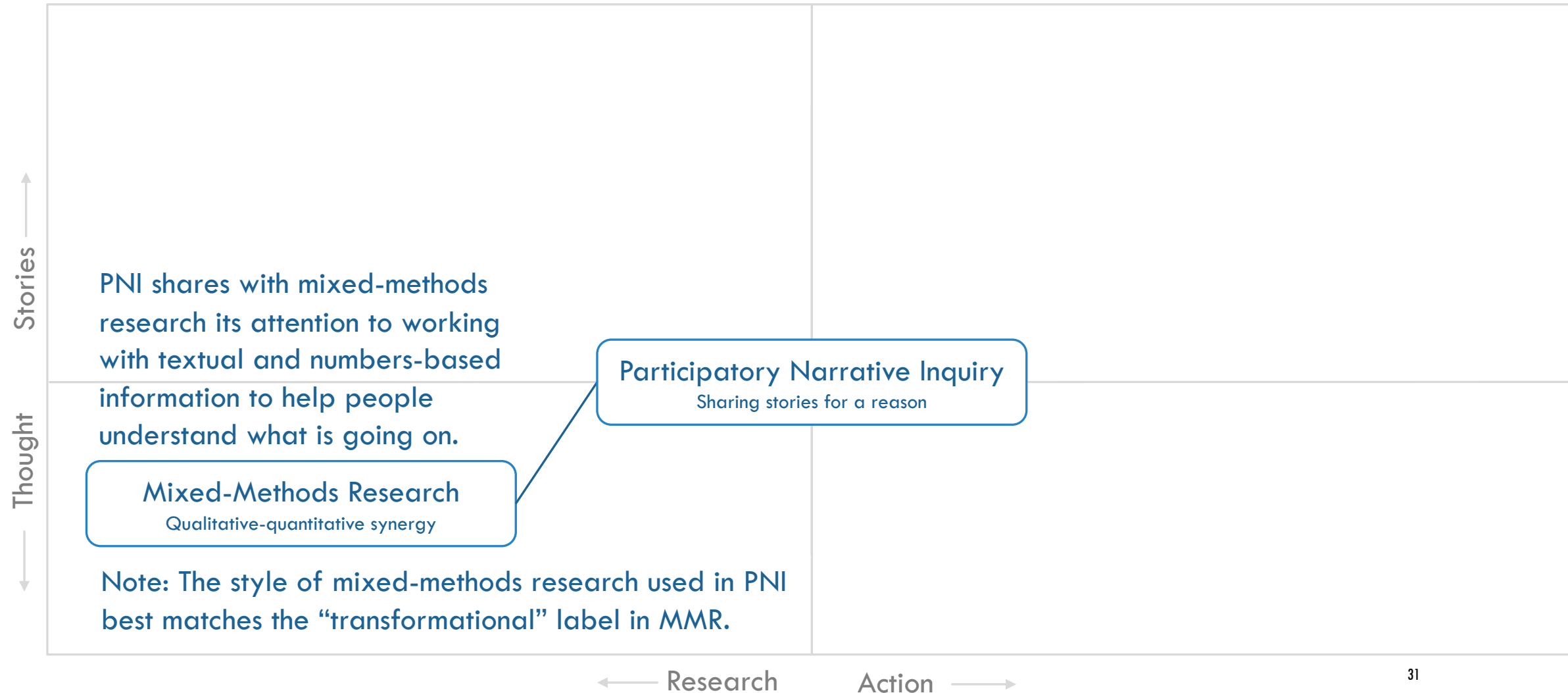
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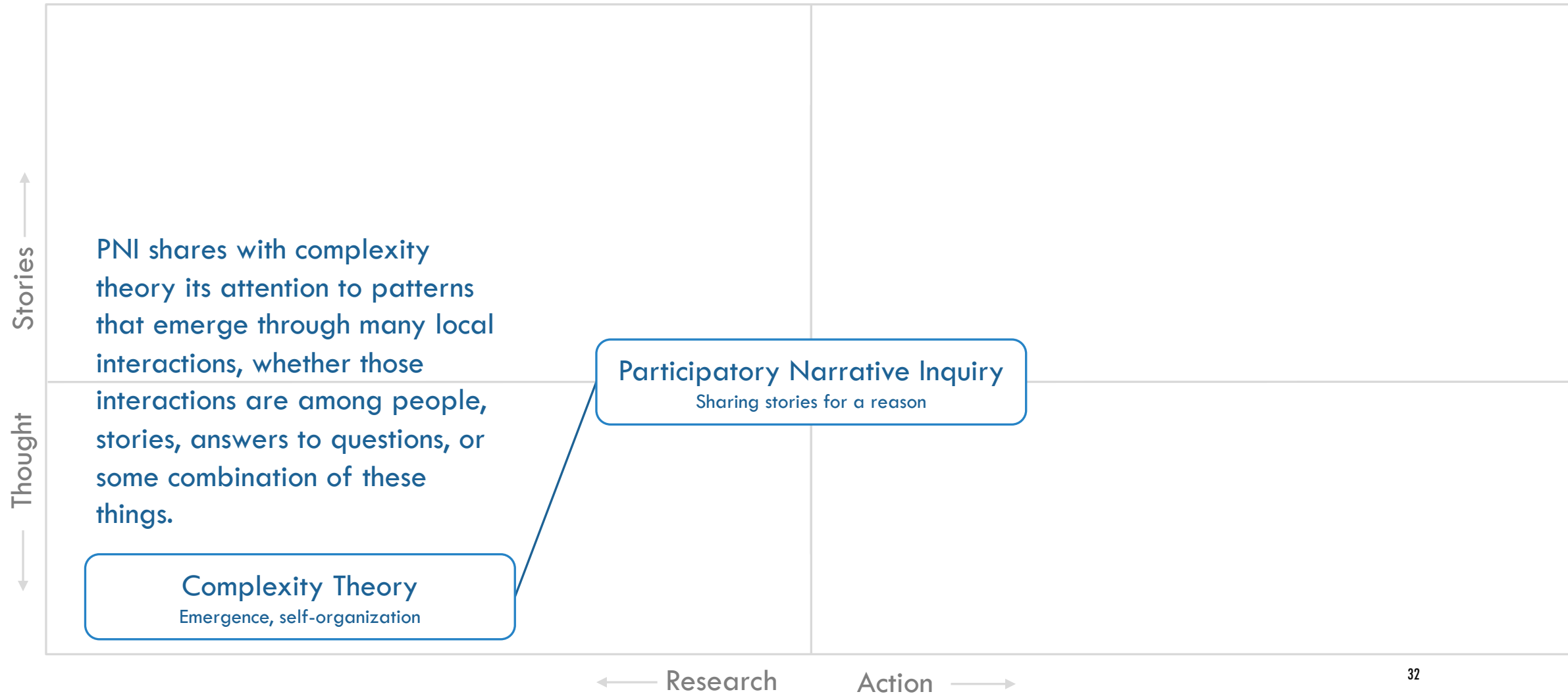
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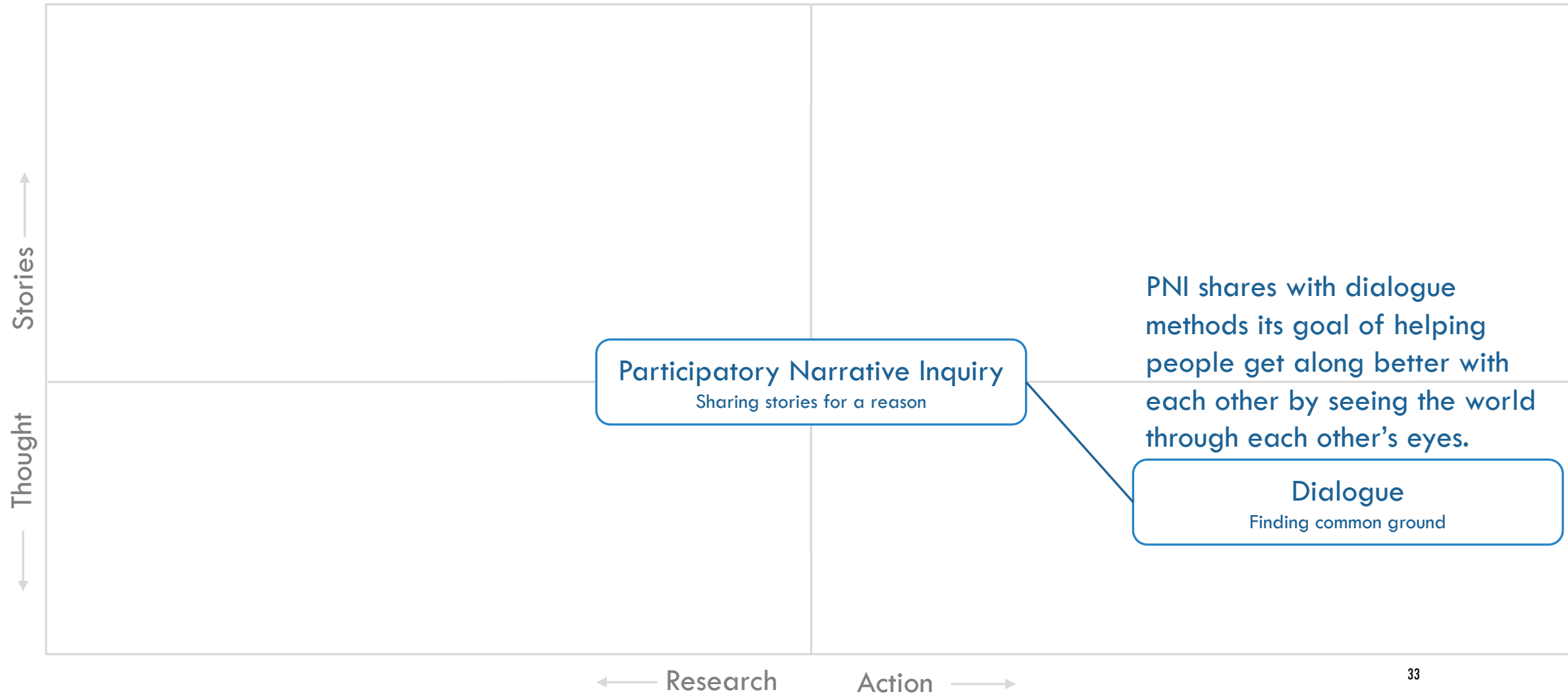
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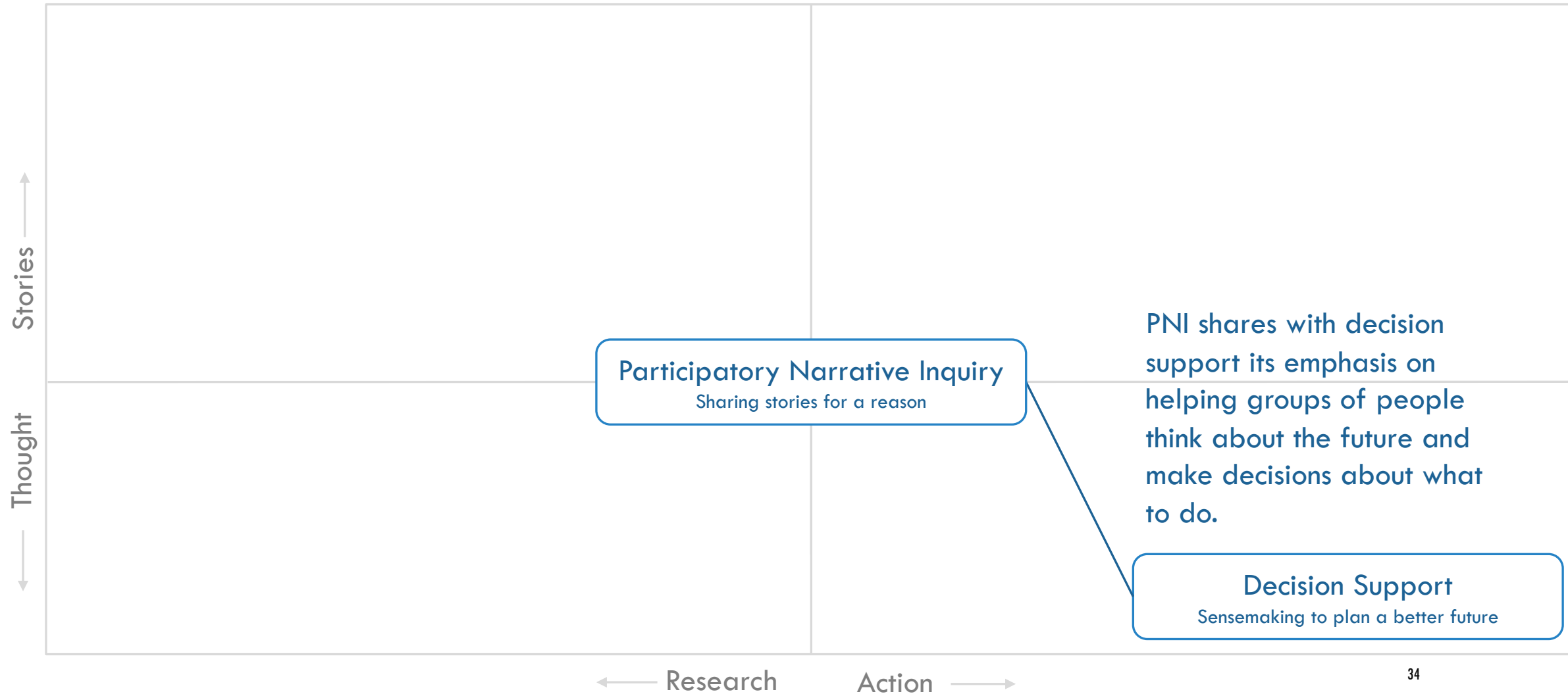
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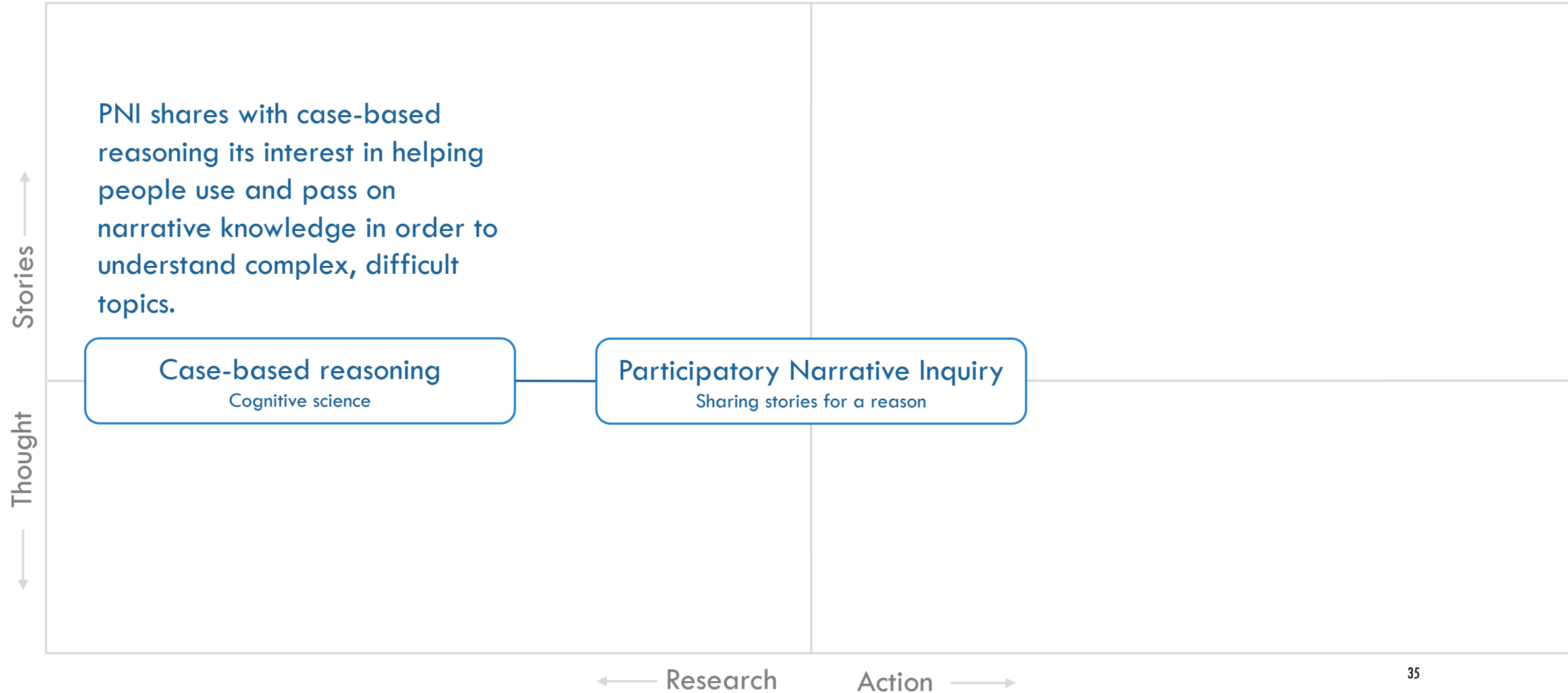
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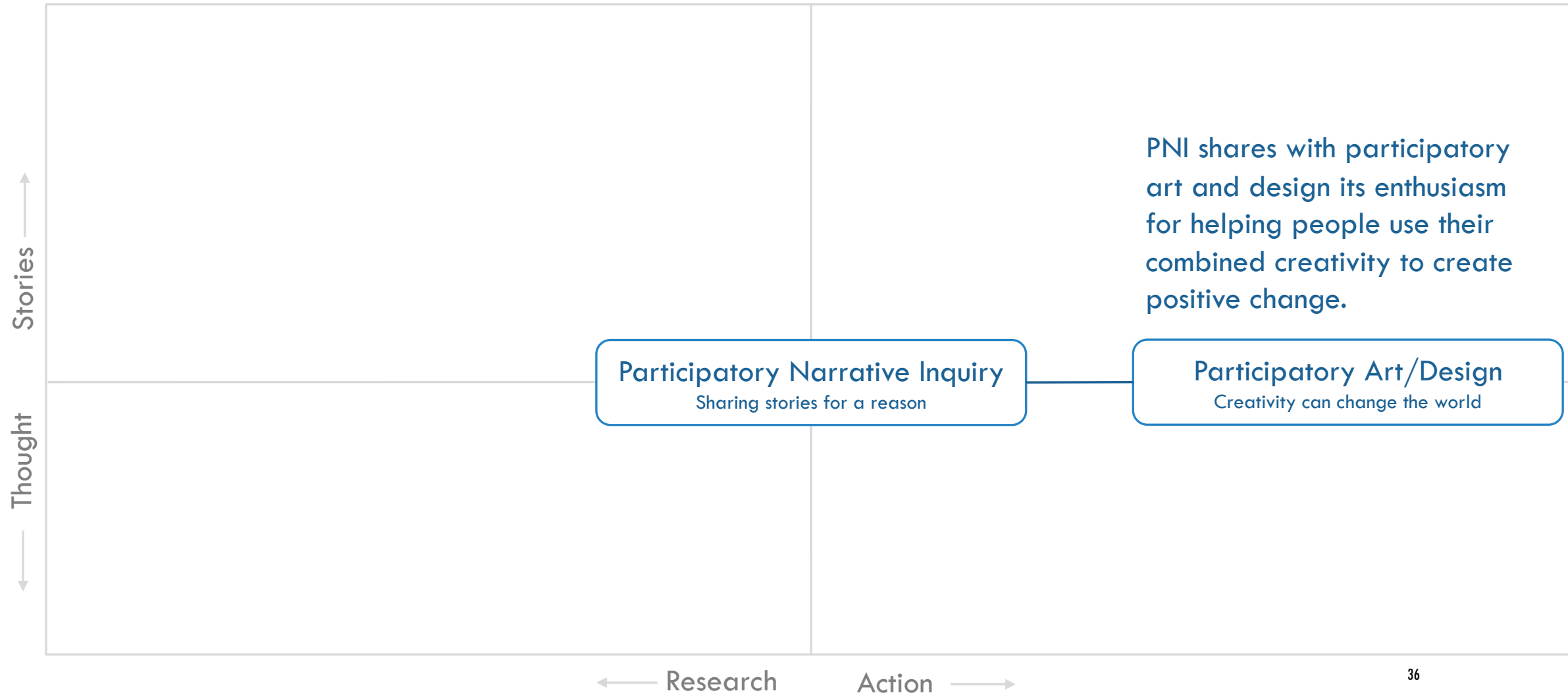
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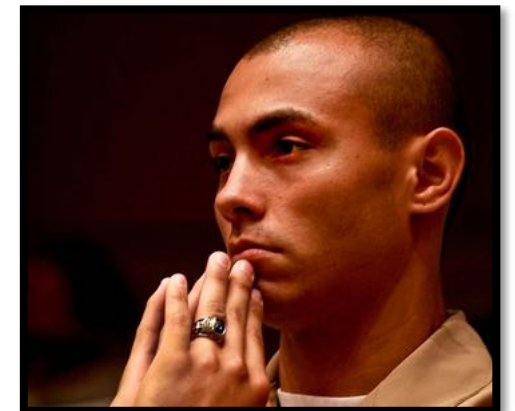
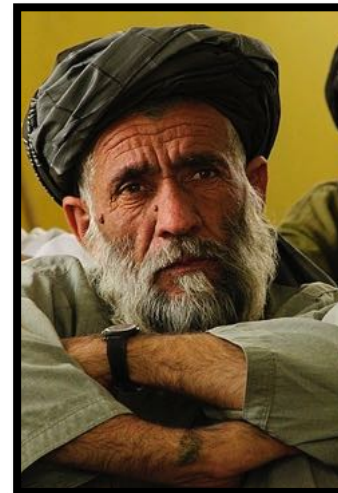
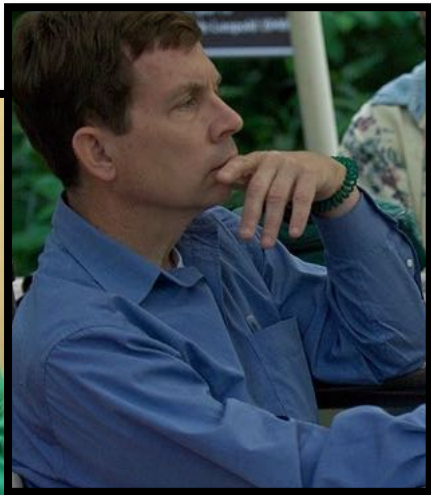
HOW DOES PNI CONNECT TO OTHER FIELDS?



WHAT ARE THE PRINCIPLES OF PNI?

The first two PNI principles have to do with its **purpose**: what it is for.

1. PNI helps stories get to where they need to go to have a positive impact on a community or organization. PNI projects *may* include aspects of study, preservation, and communication, but they never focus solely on those purposes.



2. It's all about decisions. All of the ideas and methods in PNI focus on helping groups of people make better decisions together, decisions everyone can live with in peace.

WHAT ARE THE PRINCIPLES OF PNI?

The next three PNI principles have to do with its commitment to **listen** and its **respect** for participants.

3. Don't mess with the stories.

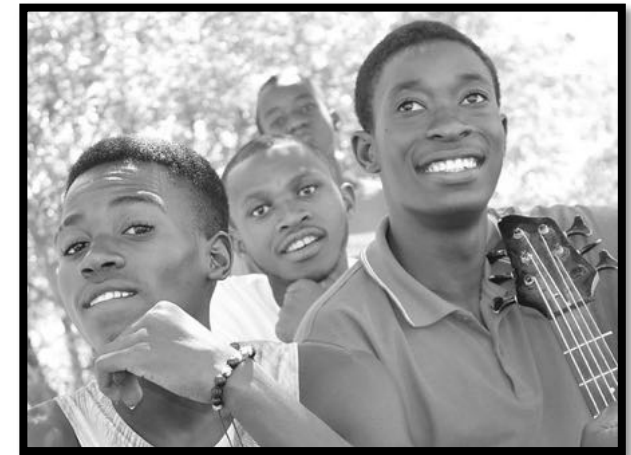
No polishing! Stories work best when they are raw, simple, and authentic.



4. **People know their stories.** No expert interpretation! Ask the people what their stories mean – to them, not in general. And don't ask people to “analyze” or “code” their stories. Ask them to explain, explore, reflect on, and make sense of their stories.



5. **Don't boil stories down; boil them up.** Don't hide emotion in dull reports. Use stories to amplify, not dampen, how people feel.



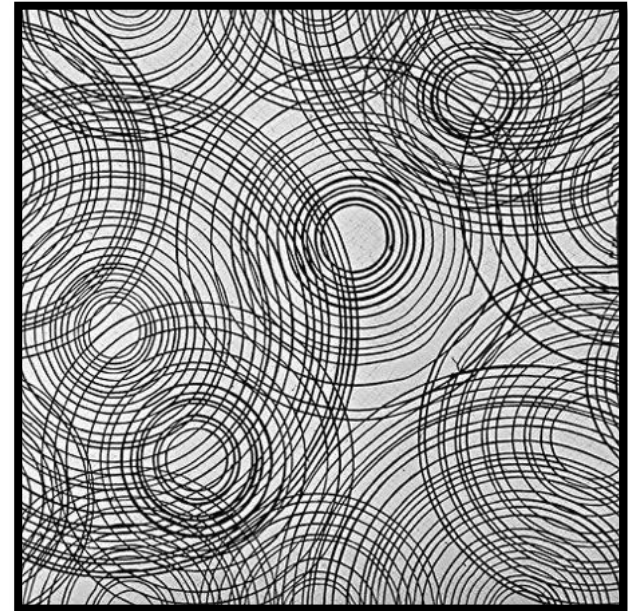
WHAT ARE THE PRINCIPLES OF PNI?

The next two PNI principles have to do with its commitment to **making sense** of what is happening.

5. The play's the thing. Story sharing is a social game that plays with possibility by partially suspending the rules of the real. Likewise, PNI helps people use their imaginations – together – to explore what has/not happened and what could/not and should/not happen.



6. Stories nest. Stories explore conflict and contrast at many scales. So does PNI. It's about awareness and understanding, not consensus.



WHAT ARE THE PRINCIPLES OF PNI?

The last principle of PNI has to do with **you**.

7. If you do not make PNI your own, you are not doing PNI.

Everyone who does PNI brings their own background, skills, talents, biases, limitations, and personality to it. That's a wonderful thing, because PNI is not a dogma. It's alive, it's growing, and it needs you.

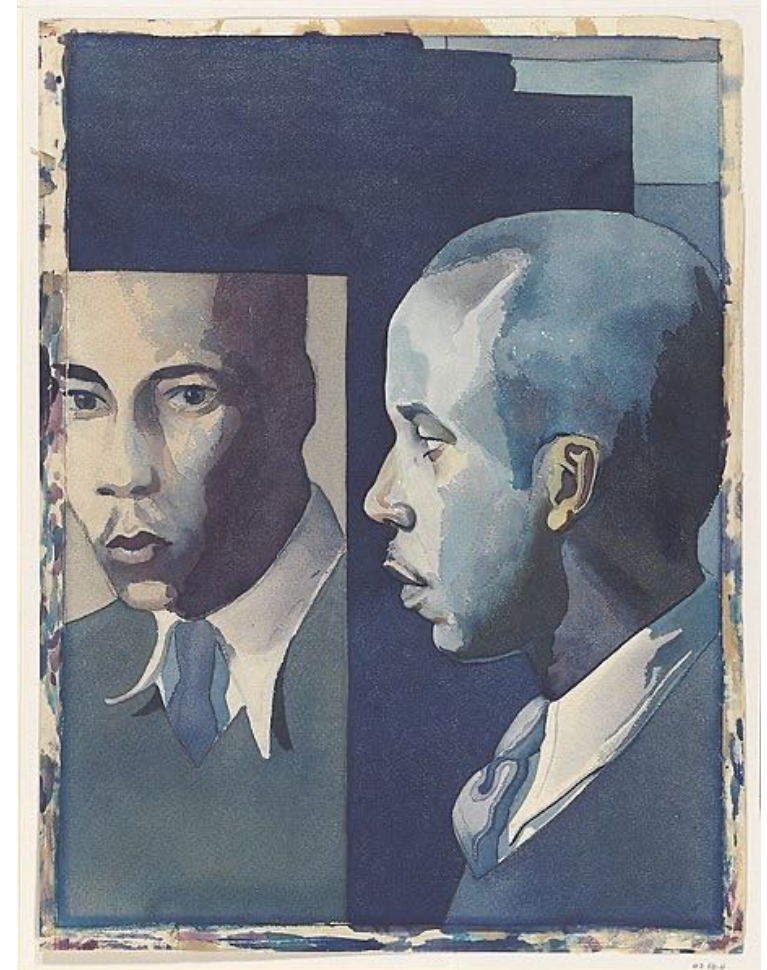


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People listening

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CHAPTER FOUR: PROJECT PLANNING

This chapter helps you get started planning your PNI projects.

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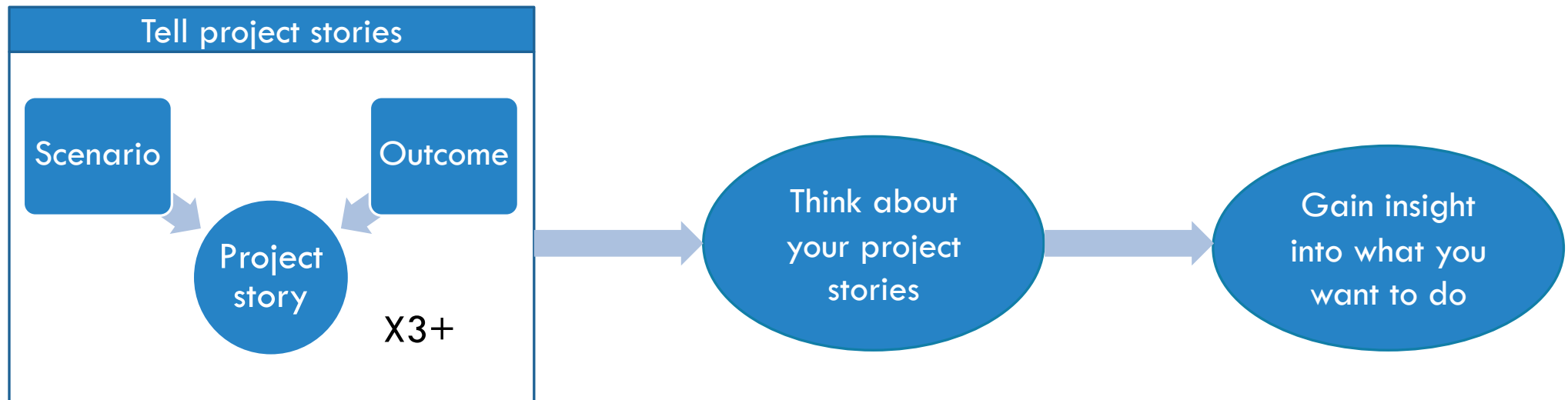
[Answer the PNI planning questions](#)

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TELL YOURSELF STORIES

To start planning a PNI project, it's a good idea to share some stories about it. Then you can make sense of your stories to understand what you are trying to achieve and what might help and hinder you in achieving it. That's right, **the best way to plan a PNI project is with a PNI project.**

Here's a simple planning exercise you can use. Build a few project stories by combining scenarios with outcomes (as described on the next two pages). Do this at least a few times. Then think about what your imagined stories can tell you about your goals, hopes, and fears.



TELL YOURSELF STORIES

These are some **starting scenarios** you can use to build your project stories.



Ask me anything

- If you could ask anyone about any experience and be sure of a truthful answer, what question would you want to ask, and of whom?
- For example: "We asked our employees what they *really* thought of our new growth plan."



Magic ears

- If you could listen in on any conversation, what would it be about, and who would be involved in it?
- For example: "We listened as patients talked to their family members after their appointments."



Magic eyes

- If you could witness any event as it happened, what event would it be, and who would be involved in it?
- For example: "We watched people decide whether or not to move into our town."



Project aspect

- If one aspect of your project set the stage for everything that happened, what would that aspect be?
- For example: "We brought grandparents and grandchildren together to talk about the future of our community."

TELL YOURSELF STORIES

For each planning story, after you have chosen a starting scenario, choose an **outcome**, then tell a story that combines both elements. You can write the story down, share it in your project team, or just think about it.



Colossal success

- If the project succeeded beyond your wildest dreams, what might happen?
- For example: “We transformed our entire way of working and became a much more effective team.”



Miserable failure

- If your project was not just useless but positively harmful, what might happen?
- For example: “People were offended by the way we asked our questions. We learned nothing and made things worse.”



Acceptable outcome

- If the project was good but not perfect, what might happen?
- For example: “We gained some valuable insights! But we feel like there is still more to discover.”

THINK ABOUT YOUR PARTICIPANTS

The next step in planning is to understand the **context** of your project. To do that, you need to think about three things: your participants, your topic, and your resources. Here are some questions to ponder about your **participants**.

Social roles

- Are these people all the **same**? Or are they different? How?
- Are these people **in charge**? Are they afraid of those in charge?
- Are these people **busy**? Or do they have plenty of free time?

Personalities

- How are these people **like** and unlike you?
- Are these **confident** people? Or are they under-confident?
- Are these people **self-promoting**? Or self-defeating?

Feelings

- How will these people be likely to **feel** about your topic?
- Will these people **know** how they feel about your topic?
- Will these people be **bored** or interested in your project?

Beliefs

- How much do these people care about **privacy**?
- Are these people **dismissive** of stories? Or maybe they are very fond of stories?
- Do these people **trust** you? Or maybe they are a little too ready to trust you?

THINK ABOUT YOUR TOPIC

Here are some questions to ponder about your **topic**.

Emotion

- Is this topic **embarrassing**, intimate, sensitive, or private? Or is it something people will have no problem talking about in public?
- Is this topic **painful** to recall? Will people want to avoid telling these stories? Or will they welcome the opportunity to reminisce?
- Is this topic **dangerous** to talk about in the wrong context? Or is it safe in all contexts?

Information

- Is this topic **simple** and easy to explain? Or is it complex and difficult to explain?
- Will you be asking people to remember events from the **distant** past? Or will you be asking them to recall recent experiences?
- Is this topic something people are likely to **think** about on their own? Or is it something people don't usually think about?

THINK ABOUT YOUR RESOURCES

Here are some questions to ponder about the **resources** you have to work with.

How much **experience** do you have facilitating PNI projects?

- If this is your **first** project, start small.
- If you are trying **new** aspects of story work, you might want to include some small pilot experiments in your larger project.

How much **help** will you have carrying out the project?

- Are you doing the project **alone**? Might you be able to find some participants who want to get more involved?
- The larger and more **diverse** your team, the more ambitious your goals can be.

What sorts of **technological resources** are available to you?

- Do you have **resources** you can use to record, store, and transcribe stories and sessions?
- Are you comfortable using **software** that can help you find patterns in your stories and data?

PLAN YOUR PRIVACY POLICY: COLLECTION

In any PNI project there are **four privacy questions** you need to resolve, and there are four corresponding pieces of information you must give to your participants. First, what will you **collect**?

More vulnerable →

Many deeply personal questions	If your topic is very sensitive, you can ask people to think of a story <i>and keep it to themselves</i> but answer some questions about it.	Asking lots of penetrating questions is a double-edged sword. It can lead to greater understanding (if people feel invited to reflect), but it can also lead to decreased (or pretend) participation (if people feel judged or interrogated). Test your questions to find a level of depth that balances exploration and safety for your participants.
A few surface-level questions	(no project)	If people will tell you stories but won't answer questions, you can still help them work with their stories in sensemaking.
No questions	No stories	One brief, light anecdote
		Many long and deeply personal stories

↑ More vulnerable

PLAN YOUR PRIVACY POLICY: IDENTIFICATION

Second, how will people be **identified**?

Identification is not just about anonymity. It's also about what you ask people to say (and not say) about each other.

Your questions should give participants a sense of respectful privacy, not only for themselves but for the whole community. **Test your questions** to find out what works best. Look for reluctance and evasion, but also notice blame and finger-pointing.

Some participants might say more than you asked them to. For example, someone might mention another person by name, or include their phone number. If you think this is likely, be prepared to remove (“scrub”) identifying information from stories as you collect them (and tell people you intend to do this).

	About me	About what happened
↑ More vulnerable	Information that links my words directly to me	Things I did or said
	Information that people in my community can use to connect my words to me (though outsiders may not see the link)	Things people I care about did or said
	Information that links my words to people like me (of my role, position, class, background)	Things people who could hurt me did or said
	Information that people who know me well can use to connect my words to me (though others may not see the link)	My opinions about what happened and what should/not happen
		Things I saw happen but have no opinions about

PLAN YOUR PRIVACY POLICY: DISTRIBUTION

Third, who will **see** what is collected, and how?

People want to be heard, but they do not want what they say to be distorted, used against them, or told to the wrong people.

The best distribution plan is multi-tiered.

- Some people won't care about privacy and will ignore it. *Keep your privacy policy short.*
- Some people won't care about privacy as long as nothing out of the ordinary happens. *Give people a way to get help if they need it.*
- Some people will care very much about privacy and will want full control over what happens to what they say. *Give them control.*

Test your distribution plan. Show it to people and watch how they respond.

	Who will get to see what I said?	How much will be seen of what I said?	How will what I said be changed?
↑ More vulnerable	Only those in power	A few excerpts selected to make particular points	It will be used to <i>inspire</i> what is said
	The whole world		It will be cleaned up a lot
	My whole community	All of it	It will be cleaned up a bit
	Those who participate in sensemaking	I get to say what gets seen and what doesn't	I get to say what changes will take place
	Only my interviewer		
	I get to say who can see what I said		

PLAN YOUR PRIVACY POLICY: REVIEW/CHANGE

Fourth, decide whether and how your participants will be able to **review and change** their contributions to the project: the stories they told, plus any other information they provided.

Will you consider a participant's desire to review or change their contribution to be a request? A negotiation? A process? An option? Or a requirement?

Which of these options is best depends on your participants, topic, and context. A policy that makes one project succeed might make another project fail.

Test your review/change policy. Show it to people and see how they respond.

	How can I see what I have contributed?	How can I change what I have contributed?
↑ More vulnerable	Contact the project team to ask to see what you said, and they will decide whether/what to show you	Contact the project team to ask to change what you said, and they will decide whether you can do that
	Contact the project team, and they will show you exactly what you said	Contact the project team, and they will let you change what you said
	Follow this link to see what you said	Follow this link to change what you said
	Here is a copy of what you said; it is yours to keep and use as you like	Here is what you said; please tell us whether you want to change it

PLAN YOUR PRIVACY POLICY: DESCRIBING YOUR POLICY

Include your privacy policy in every invitation to participants. Keep it brief but comprehensive.

Test your policy to see whether your participants find it clear and acceptable.

Tell people	For example	Tips
What you are looking for and why	We are gathering accounts of lived experience from ___ around the topic of ___ so we can ___.	Don't use the word "story" until after at least one participant has told a story.
What information you will collect	This ___ (interview, conversation, session) is completely anonymous. Every question is optional. Say as little or as much as you like.	If you are recording the conversation, say how the recording will be processed (transcribed, archived, destroyed, disseminated, etc).
What information you want people to conceal	Please do not include identifying information about yourself or anyone else, including ___.	You may also (or instead) want to say that identifying information will be removed.
How the collection will be used and distributed	This ___ will be used, along with other ___ gathered from ___, in a series of group sessions, to which ___ is/are invited. To join, ___. Your ___ may also be used in/to ___. Do you give us permission to ___?	Don't use the word "sensemaking" unless people already know what it means. If you plan to use what is collected outside of sensemaking, ask for explicit permission.
How people can review or change things later	You can review your ___ by ___, and you can change or remove it by ___.	To help people feel free to speak now, give them the freedom to change their minds later.

ANSWER THE PNI PLANNING QUESTIONS

After you have thought about your project's goals and context, it is time to define your project by answering some critical **questions** about it. Work on your answers to these questions, because people will ask them.

Goals

- Why are you doing this project? What is your aim? If you succeed, what will you have achieved?

Relations

- Who are you, and who are your participants? How are you all connected to the group, family, community, or organization?

Focus

- What is the project about? What is its topic? Are there sub-topics?

Range

- What will the project cover? How is it diverse? What will it bring together?

Scope

- How big will the project be? How many participants will be involved? How many stories will you gather? How many sessions will you hold?

Emphasis

- Which parts or aspects of PNI are most and least important to your plan?

BUILD YOUR WIN-WIN PROPOSAL



Now that you have thought about your project goals, it's time to think about **your participants' goals**. What do *they* want from the project?

Consider every participant group separately, especially groups with different amounts of power. What might make the project turn out well and poorly for each group?

If you don't know, ask. Explain the project and its goals to a few people from each group. Do they respond with enthusiasm? Indifference? Suspicion? Resignation? Ask them what would make the project more useful to them.

Now think: What kind of project would these people be excited to bring their energy into? If your project isn't like that already, can you improve it? If different people want different things, what can you do to help them *all* get at least some of what they want?

WRITE YOUR PROJECT SYNOPSIS

The last step in planning your project is to prepare a brief **synopsis** that describes what you plan to do, why, and how; explains what participants will get out of joining in; and includes a succinct explanation of your privacy policy.



We, the members of the community council, want to talk to our neighbors about our community's future. We will ask people from across our community to tell us about events of the past that they would like to see happen again. We invite everyone to join us in working with the anonymous stories we collect in a series of participatory workshops to be held over the next six months.



We are a group of nurses dedicated to improving patient safety in our hospital. We are working together to gather stories from patients and staff, and we would like to collaborate with any interested patients, family members, and staff to make sense of what we collect. We will make the (anonymous) stories we gather available to everyone in our project report.



At the International Student Center, we want to help foreign students succeed at our university. We will ask a diverse group of students to tell us about their first month at the university. We will use the stories we collect to help us design new programs, and we will make the stories available (anonymously) to other foreign students who need help settling in.

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CHAPTER FIVE: STORY COLLECTION

This chapter describes a variety of methods you can use to gather stories in a PNI project.

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ASKING QUESTIONS FOR AND ABOUT STORIES

(AND STORYTELLERS)

How do you collect stories?

What works? What doesn't?

How can I help people feel heard and respected?

What should I ask people about? How?

WHAT IS THE BEST WAY TO ASK SOMEONE TO TELL YOU A STORY?

You could **ask** them to tell you a story.



They will focus on **you** and try to guess what sort of story you want them to tell.

You could **tell** them a story, then ask them to respond.



They will focus on **you** and try to tell the same kind of story you told.

You could ask a **question** whose answer is a story.



They will focus on the **question** and try to answer it – maybe without even *noticing* that they are telling a story.

WHAT'S A GOOD STORY-ELICITING QUESTION?

The best questions invite people to **reflect** on their experiences and **freely choose** an experience that **matters** – to **them**, not to you.

I am asking you to recall	Looking back over your life,	I want to hear about you
a particular type of situation.	can you remember a time when you felt like	and about your feelings.
Within that,	someone had your back,	I invite you to think
you are free to choose	like you could take a risk because they were	about this with me.
any story you want to tell	there to help? Or did you ever feel like someone	I give you the floor
(positive or negative).	<i>didn't</i> help when you needed it? What happened	to tell me a story.
	that you remember?	

The subtext of this question is: I really do want to hear **whatever you want to tell me** about what has happened to you on this topic. Go ahead and choose what you want to tell me. I'm listening.

WHAT'S A BAD STORY-ELICITING QUESTION?

Good questions provide **opportunities** to contemplate the past. Bad questions issue **commands** to retrieve specific pieces of information. People do sometimes respond to bad questions by telling stories. But they tell **safe**, camouflaged, defensive stories.

Give me information	Tell about a time
about this particular situation.	when someone had your back,
Choose it based on my description, not on your feeling.	when you could take a risk because they were there to help.
Now evaluate that person.	What did they do, and
Now evaluate yourself.	how did it help?

The subtext of this question is: I don't want to hear whatever you want to tell me about what has happened to you on this topic. I don't invite you to think about this with me, and I don't give you the floor to speak freely. I just want **answers to these specific questions**.

DOES A GOOD QUESTION HAVE TO BE LONG?

No. Any question with the three essential elements – invitation, reflection, and freedom – is a good story-eliciting question.

I invite you to think about this with me.

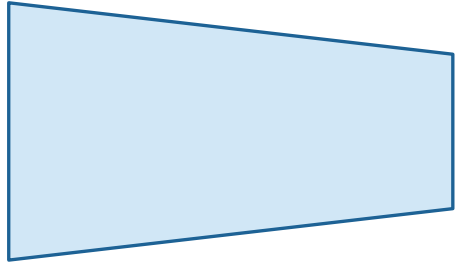
I am asking you to recall a particular type of situation.

When you think about trust at work,
what experience springs to mind for you?
What happened that mattered to you?

I give you the floor to tell me a story.

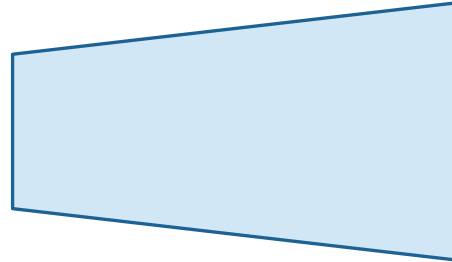
Within that, you are free to choose any story you want to tell (positive or negative).

STORY-ELICITING QUESTIONS ARE NEITHER OPEN NOR CLOSED



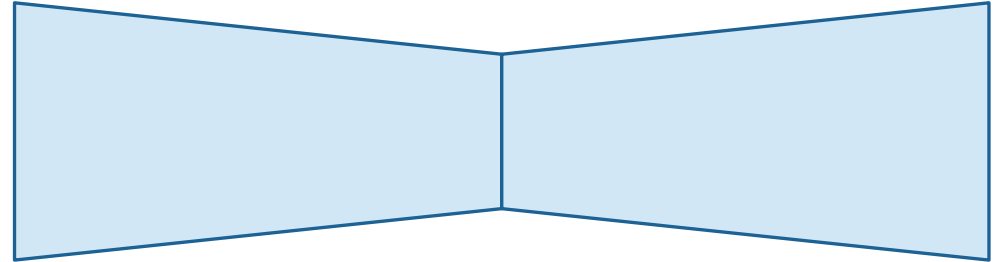
A **closed-ended** question asks people for a specific response.

When was your last visit to our office?



An **open-ended** question gives people the freedom to say anything at all.

How do you feel about our office?



A **story-ended** question uses socially significant cues to ask people to tell a story, excluding non-narrative responses.

What happened on your visit to our office?

Within that scope, it gives people the freedom to tell any story they like in any way they like.

HOW TO TELL IF A QUESTION IS STORY-ENDED

Here's a simple test. **Try to answer the question without telling a story.**

For example, in an early draft of this book, I wrote this story-eliciting question:

When was the first time you felt at home in our neighborhood? What was that day like for you?

That was a mistake! Can you see what's wrong with the question? You can answer it without telling a story. You could answer it by saying:

It was last March. It was a good day.

See? That's not a story. Nothing happened. Now here's a question that works better:

When you look back on your time living in our neighborhood, can you recall the first time you really felt at home here? Could you tell us what happened on that day?

That question is a lot harder to answer without telling a story.

CONSIDER A MENU OF QUESTIONS

A menu is a list of 3-5 story-eliciting questions. Menus help people negotiate a **connection** between their experiences and needs and the goals of the project. For example:

When you look back on your time living in our neighborhood, can you recall the first time you really **felt at home** here? Could you tell us what happened on that day?

This is a **safe** question. It appeals to people who are afraid to speak up. (Start with the safest question.)

Describe your **best or worst** day living in our neighborhood. What happened on that day?

This is a question about **extremes**. It helps people who can't think of anything to say.

Did you ever see a neighbor do something and think, “**If we all** acted like that, we'd get along so much better”? Or, did you ever think, “If we all acted like that, we'd never get along”? What did you see?

This is a “**spill the beans**” question. It gives people an opportunity to bestow praise or place blame.

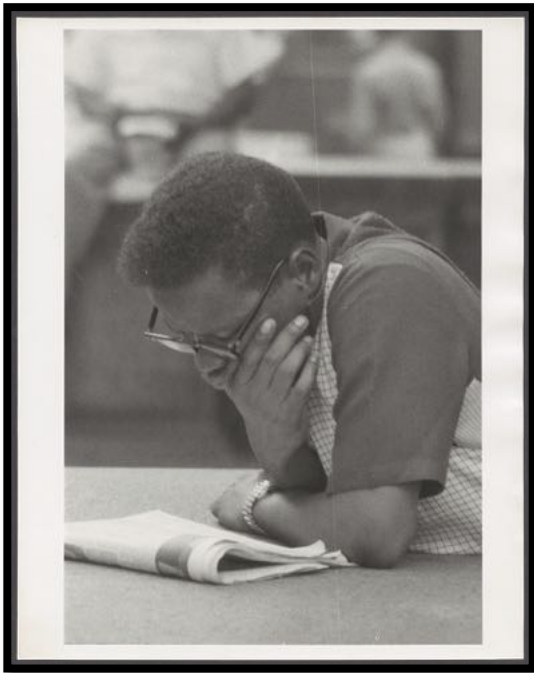
If none of these questions appeals to you, tell us about something that happened in our neighborhood that **mattered to you**.

This is for people who want **permission** to tell a specific story.

MENUS OF QUESTIONS DON'T ALWAYS WORK

Menus are easy to use in a survey or a group session, when you can **show** people the menu and let them read the questions and choose one to answer.

Menus are hard to use over the phone or when people can't read. Asking people to **remember** a list of questions without anything to look at can confuse and intimidate them. In those situations, one well-chosen question is a better choice.



In a group session, you can pass around a menu of questions or write it on a whiteboard. People often like picking out a question that suits them best.



WHY ASK QUESTIONS ABOUT STORIES?

When people share stories in ordinary conversation, polite listeners ask **respectfully curious questions**, like:

What did they say to that?

How did you feel about that?

How did you recover from that?

Why do you think that happened?



Because a story is a	People ask questions	So in PNI we ask questions about
message	to show they get the point	story form
tool	to learn from the story	story function
link	to connect with the storyteller	story phenomenon

ASK QUESTIONS THAT RESPECT STORIES

You want your participants to make sense of their stories, learn from them, and explore what they mean. You do not want your participants to feel that they have to justify or evaluate their stories. Use your questions about stories to **communicate two enabling messages**.

1. The only justification you need to tell a story is that **it matters to you**. You do not need to prove that the story is worth telling. You do not need to tell a “good” story. The story you tell is the right story to tell.

Say

How long do you think you will remember this story?

How do you feel about this story?

Who do you think needs to hear this story?

Don't say

What makes this a memorable story?

Is this a success story? If not, why not?

Is this story worth retelling?

2. **We are not here to evaluate** you, your story, the way you tell it, or your actions in it. We are only here to listen.

Say

How do you wish this story had ended?

Why do you think you chose this particular story, and not a different one? What does it mean to you?

How do you think the story could have turned out better?

Don't say

What could you have done better?

Why did you tell this story?

What mistake did you make?

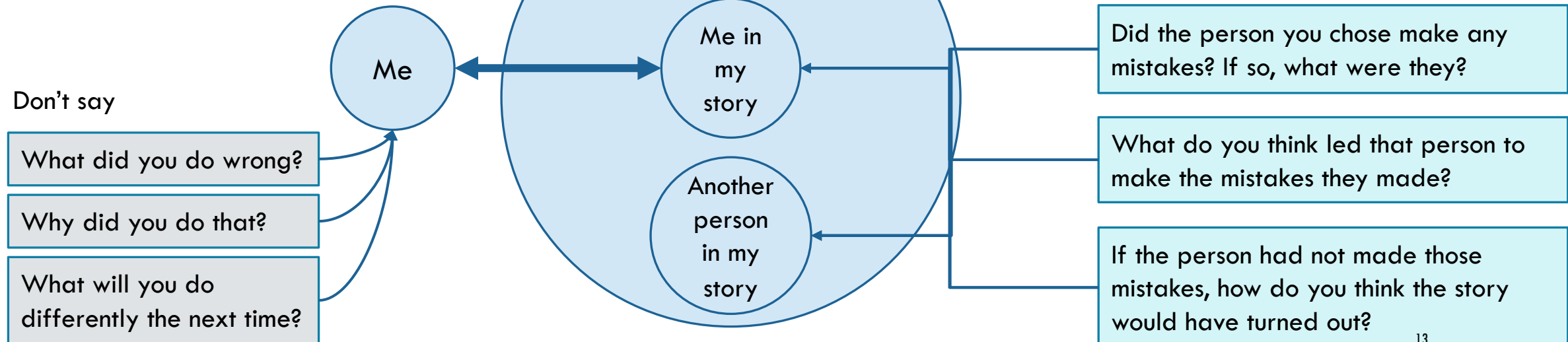
NARRATIVE DISTANCE FOR SAFE EXPLORATION

Good questions about stories create **narrative distance** between the storyteller and their character in the story, who is both them and not them. You can help participants see themselves from a new perspective, as if they were floating above themselves.

Say

Choose a person in this story you want to think about. It could be anyone.

Being given a choice makes it easier to choose yourself – and to see yourself as a character.



ASK QUESTIONS THAT INVITE REFLECTION

Say you take a photograph of a person, then ask the person to look at the photograph with you. Then you ask the person some questions.

Are you attractive?

Are you well-dressed?

Are you smart?

Are you confident?

Are you trustworthy?



What do you like most and least about this photograph?

What does your expression in the photo say to you?

Is this a typical photo for you? If not, how is it different?

What about you is *not* captured in the photograph? What is missing?

The "you" in the first set of questions is in the photograph. The "you" in the second set of questions is both inside and outside the photograph. When you ask questions about stories, ask the second type.

ASK QUESTIONS ONLY STORYTELLERS CAN ANSWER

The best question about a story is a question that **only the storyteller can answer**. If anyone else can answer a question (either by reading the story or by knowing about the events described in it), don't waste the storyteller's precious time and attention on it.

*Questions only the
storyteller can answer*

How do you feel about this story?

What do you think the people
in the story wanted or needed?

What surprised you most
about this story?

How long do you think you
will remember this story?

I got to the phone shop at 9am to open up. The door was broken in. There was glass everywhere. I called the police right away. It took them 20 minutes to get there. At first they thought I did it! Why would I call them if I did it? After a while the owner got there and vouched for me. I am going to have to be more careful.

*Questions other people
can answer*

When did the incident take place?

What kind of shop was it?
What was stolen?

Was the thief caught? Was
it an employee of the shop?

Did the police follow normal procedures?

GOOD QUESTIONS ABOUT STORY FORM

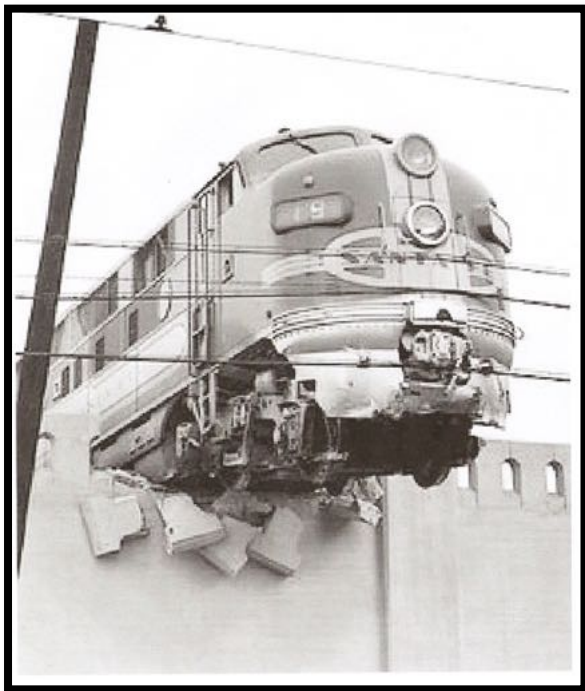
Questions about story form focus on **the story itself**: its setting, characters, plot, and outcome.



Good story form questions	Not good	Why not?
How well would you say this story turned out? For whom? Did it turn out badly for anyone?	Is this a good story?	The quality of the story doesn't matter. What matters is its message and purpose.
What did the people in this story want or need? Did they get it? What helped them? What hindered them?	Did you get what you wanted?	When asking about a person in a story, keep the focus inside the story – even if the person in the story is the person who told it.
Who would you say acted with the most and least responsibility in this story?	Whose fault was this?	Keep the focus on the story as a story , not as evidence.

GOOD QUESTIONS ABOUT STORY FUNCTION

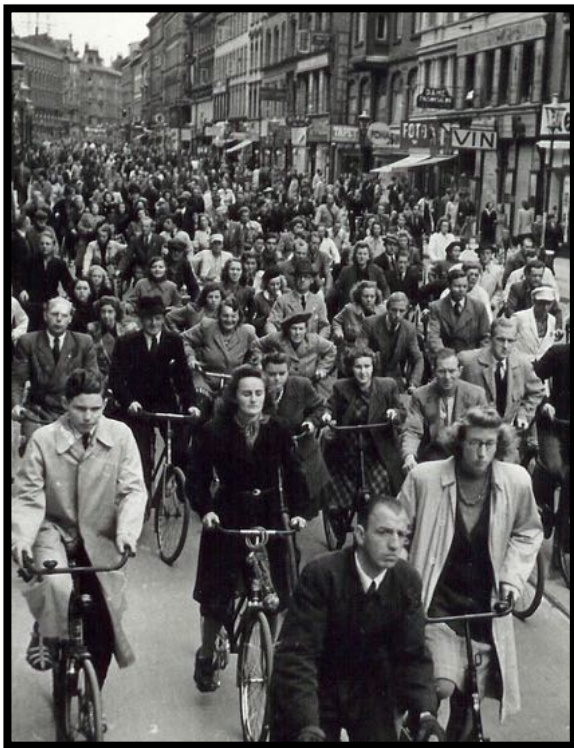
Questions about story function focus on **connections** between the story and other stories in the experience of the storyteller and their audience.



Good story function questions	Not good	Why not?
What surprised you about this story?	What is surprising about this story?	You don't want to seem as if you are evaluating the story or testing the storyteller's knowledge. You want to show that you are curious about the storyteller's unique perspective . So it is important to ask how people see the story, not how the story "is" in some general sense.
What does this story say to you about trust?	Explain how trust mattered in this story.	
What do you wish had happened in this story?	What went wrong?	

GOOD QUESTIONS ABOUT STORY PHENOMENON

Questions about story phenomenon focus on **the story of the story** – where it came from, where it is going, and what it all means.



Good story phenomenon questions	Not good	Why not?
Where did this story come from? Did it happen to you, or did you hear it from someone else?	Did this really happen?	Don't accuse the storyteller of lying, even if the story is obviously untrue. Literal truth is beside the point.
Why do you think you chose this particular story to tell? What does it mean to you?	Why did you tell this story?	Invite the storyteller to examine their thoughts; don't judge their choice.
Who needs to hear this story, in your opinion? Who would want to hear it, and who wouldn't? Why?	What is the best audience for this story?	Avoid casting the story as a performance, and avoid asking the storyteller to evaluate the story.

WHY ASK QUESTIONS ABOUT STORYTELLERS?

For two reasons.

1. Asking people questions about themselves helps you **understand** the stories they tell.
2. Pairing indirect questions about stories with direct questions about people can be revealing in juxtaposition. Sometimes there are **telling differences** between the things people say in these two different ways.

Never ask for more information about people than you actually need. Overly intrusive personal questions change the stories people tell.



VIEWS ON ISSUES

Embedding a small **opinion survey** in a story form helps you approach your topic in two ways at once, so you can compare the results.



How do you feel about ____? Do you think it's helpful or harmful?

If you could write a law regulating ____, what would it say?

What do you think causes ____? What would fix it?

What do you think ____ will be like in ten years? Why?

How happy are you with your current job (or living arrangement)?

Are you thinking of leaving anytime soon?

VIEWS ON THE COMMUNITY OR ORGANIZATION

Asking people direct questions **about the community or organization** to which they belong can provide useful juxtapositions with the stories they tell about it.



Would you say that this community is more focused on the past or the future?

Do people in this community listen to each other, in your experience?

If you want to stay here, why is that? If you think about leaving, why is that?

What do you think our community will be like in twenty years?

HABITS AND TRAITS

Learning about each storyteller's **habits of thought** helps to put their stories into context.



Are you a big-picture thinker? Or do you tend to wade into the details?

Are you careful in your work, or do you tend to be a little sloppy? And how do you feel about that?

Does being around people energize or drain you?

Do people often say that you think in strange or different ways? Or does that never happen?

ROLES AND GROUPS

Questions about roles are useful when you want to look at **collective patterns** within an organization or community. These questions usually have to do with specific groups within the organization or community in which the project is taking place.



What is your position?

Do you work alone or in a team?

Do you work independently, in the sense that you plan what you will do next? Or does your work depend on plans made by other people?

Do you supervise other people? If so, how many?

How much paperwork do you deal with in your job?

DEMOGRAPHICS

Questions about demographics can reveal useful patterns when it comes to **common influences** on perspectives.



Which of these age ranges do you fall into?

What is your ethnic background?

Do you rent or own your home?

Do you live in a city, suburb, town, or village?

What is your income?

How much formal education have you received? How about informal education?

THE ORDER OF QUESTIONS MATTERS

Start with one or more eliciting questions.
After each story has been told...

Start with **emotional** questions about the story. Asking about emotions shows that you are listening. Also, emotions are most vivid just after a story has been told.

Finish with **factual** questions. Up-front factual questions may come across as interrogatory. Later on, they seem clarifying, not judging.

After the person is done telling stories,
ask them some questions about themselves.

Start with questions about **views**, because they are closest to the emotions of storytelling.

Continue with questions about personalities and roles.

End with factual questions about **demographics**, which might seem intrusive earlier on.

MIX UP YOUR QUESTION TYPES!

A **mix** of question types (choices, scales, free texts) offers an interesting experience.

1. How do you feel about this story?

happy sad

angry pleased

energized bored

other _____

2. How much trust do you see in this story?

(Mark a spot along the line.)



No trust at all

Abundant trust

3. Who do you think needs to hear this story?

(Answer in your own words.)

A **mass** of identical questions creates more of a “ticking off boxes” chore.

1. How do you feel about this story?

happy sad

angry pleased

energized bored

other _____

2. How much trust do you see in this story?

no trust a little some a lot

other _____

3. Who do you think needs to hear this story?

town leaders

the town council

everyone

other _____

IMAGE CREDITS

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Young woman looking to the side <https://www.flickr.com/photos/internetarchivebookimages/14759866356/>
Old woman talking <https://www.flickr.com/photos/internetarchivebookimages/14596409427/>

CONDUCTING A STORY-GATHERING INTERVIEW

What's a story interview like?

How is it different from a non-narrative interview?

How can I get people to tell stories?

What can I do if they don't?

STORIES AND PERSONALITIES


Some people tell lots of stories, and some don't. Some people *think* they tell lots of stories, and some don't. These differences combine to create **four types** of storytellers.

		Do they think they tell stories?	
Do they tell stories?		Yes , they think they tell lots of stories.	No , they think they never tell stories.
	Yes , they tell lots of stories.	Story performers think they tell many stories. They do.	Natural storytellers think they never tell stories, but they do.
	No , they tell few stories.	Confident non-story tellers think they tell lots of stories, but they actually don't.	Reluctant storytellers think they never tell stories, and they're right. They don't.

To gather stories from each of these types, you need a different approach. Let's go through them one at a time.


STORY PERFORMERS

In the upper left (yes/yes) are the story performers.

		Do they think they tell stories?	
Do they tell stories?		Yes, they think they tell lots of stories.	
	Yes, they tell lots of stories.	<p>A story performer tells lots of stories – and they know it. They can't help focusing on the performative act of storytelling. It's familiar and fun, and they get carried away, forgetting what you asked about.</p> <p>Story performers are fun to interview, but they can distract you from your goal. Keep guiding their focus back to what actually happened to them and away from what makes the best story.</p>	

NATURAL STORYTELLERS

In the upper right (yes/no) are the natural storytellers.

		Do they think they tell stories?	
Do they tell stories?			No , they think they never tell stories.
	Yes , they tell lots of stories.		Natural storytellers tell lots of stories, but they have no idea that they are doing it. That's fine. You don't need people to <i>know</i> they are telling stories. You just need them to tell stories. This is the easiest type of storyteller to interview. Just ask a story-eliciting question and let them answer it . Make sure you give them permission to speak freely; but that is all they will need.

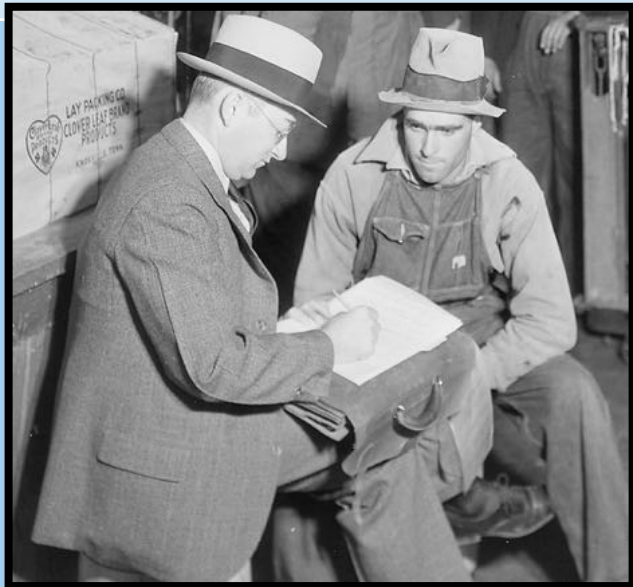
CONFIDENT NON-STORY TELLERS

In the lower left (no/yes) are the confident non-story tellers.

		Do they think they tell stories?	
Do they <i>actually</i> tell stories?		Yes, they think they tell lots of stories.	
	No, they tell few stories.	<p>Confident non-story tellers <i>think</i> they tell lots of stories, but in truth they mostly express opinions.</p> <p>These people are the hardest to interview, because they <i>think</i> they are doing what you asked them to do, even though they are not. Keep drawing their focus back to their personal experiences. Ask, “Can you remember a specific time when you felt that way?”</p>	

RELUCTANT STORYTELLERS

In the lower right (no/no) are the reluctant storytellers.

		Do they think they tell stories?	
			No , they think they never tell stories.
Do they tell stories?	No , they tell few stories.		<p>Reluctant storytellers tell few stories and know it. It's just not the way they think. These people <i>can</i> tell useful stories; they just need a little help.</p> <p>These people are not hard to interview, but it does take some patience. Ask them questions that draw out the story. For example: "What happened next?" and "How did you feel about that?"</p>

REMEMBER THIS RULE

Avoid saying the word “story” until *after* people have started telling stories.

You say



They hear



To most people today, “story” means “TV and movies” or “newspapers.” It does *not* mean “things that have happened to me.”

You don’t want people to **audition** for a TV show. You want them to **reflect on their experiences**.

So you must keep the word “story” out of the conversation until *after* the person has told at least one story. *Then* you can refer to what they have said as a story – and they will understand what you mean.

It’s a **paradox**: the more often you say the word “story,” the fewer useful stories you will get.

HALF-STORIES AND HOW TO FIX THEM

When you ask people to tell stories, they often respond with three types of not-quite-stories. You can help people turn half-stories into real (and really useful) stories.



A **situation** is a snapshot, a description of a state of affairs at a moment in time. It's not a story, because nothing changes and nothing is resolved.

Ask: What happened **after** that?
How did things turn out?



A **scenario** is a generalized plot that summarizes many similar experiences. No *particular* events are recounted.

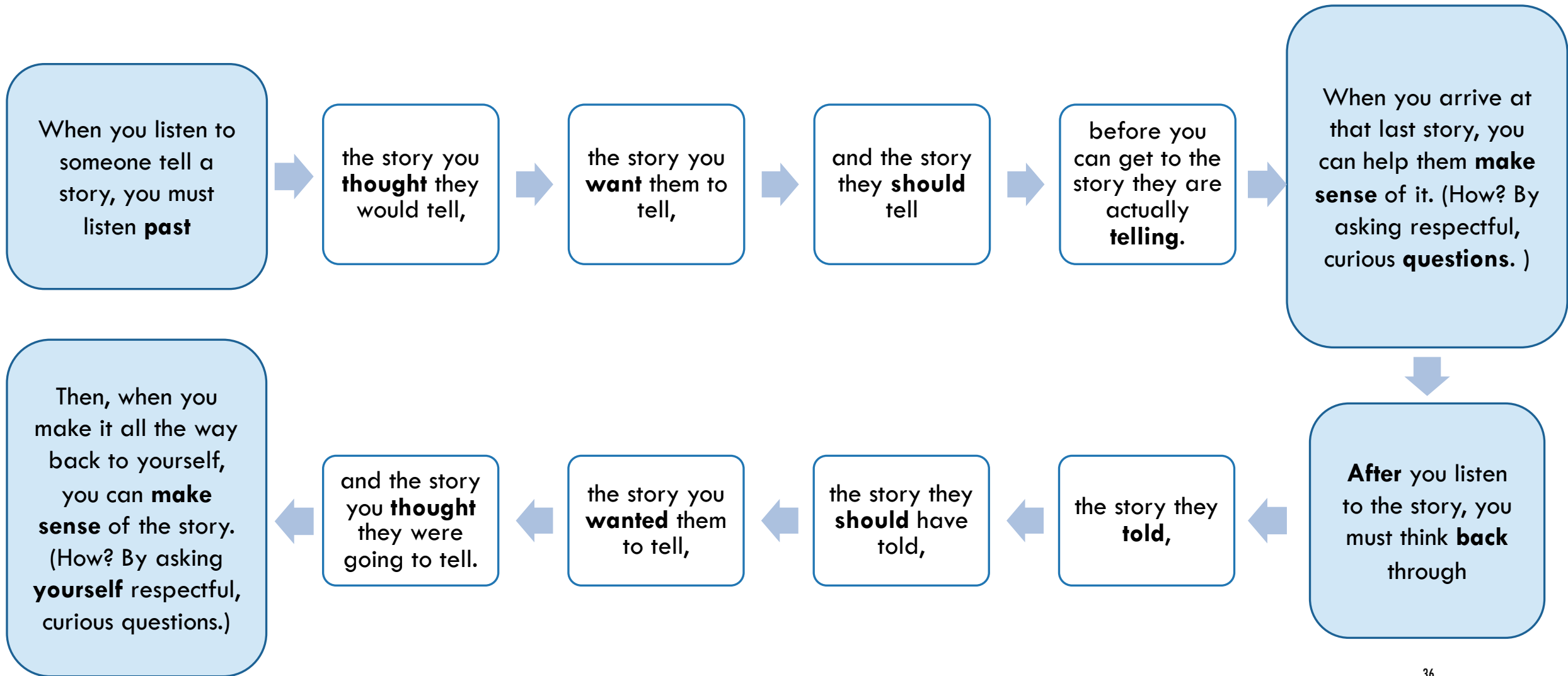
Ask: Can you remember a **specific** time (or moment or day) when that happened?



A **reference** is a hint at a story that “everyone knows” (or no one knows). The actual story is left untold.

Ask: Could you **tell me more** about what happened?

THE STORY-LISTENING JOURNEY



SIMPLE AND COMPLEX STORIES



Some stories are **naturally simple** because they are about uncomplicated things.



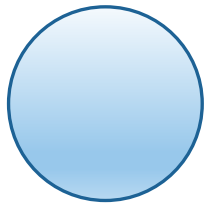
Some stories are **purposefully simplified** in order to communicate or persuade with clarity.



Some stories are **complex** because they combine many messages and purposes. Complex stories are the most useful stories in story work.

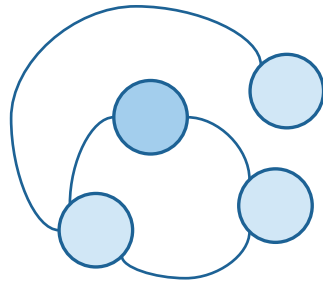
HOW TO BRING OUT COMPLEX STORIES

There are (at least) five ways in which stories can be complex, and there are five corresponding ways you can help people **complexify** their stories as they tell them.



Internally complex stories are rich with nuance. They plumb the depths of an experience.

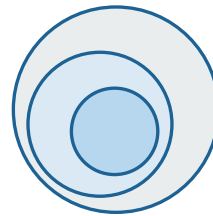
Ask: How did that **feel** to you? What surprised you about it? What did you learn from it?



Externally complex stories are connected to other stories in webs of meaning.

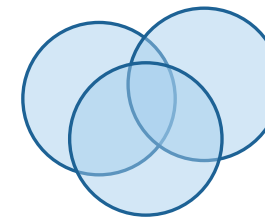
Ask: Does this **remind** you of any other times when you felt the same way? How about when you felt the **opposite**?

Relationally complex stories come in three varieties.



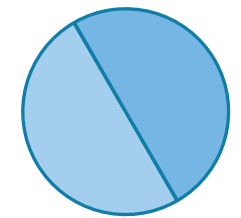
Nested stories have other stories inside of them.

Ask: Why did you respond the way you did? Did something **happen**, maybe a long time ago, that caused you to respond in that way?



Combined stories mix and match elements from other stories.

Ask: If this story had taken place in **another** place or at another time, what would be the same, and what would be different?



Multi-perspective stories contain more than one point of view.

Ask: How do you think **they** would tell this story, if they were telling it to me right now?

STORY WORK IS EMOTIONAL LABOR

When you ask someone to share a story with you, you are giving them permission to express their emotions, values, and beliefs. The experience can be exciting! But it can also be **draining**. You may not agree with everything they say, and you may experience vicarious emotions like sadness or anger. Especially if you are collecting a lot of stories, you may start to feel burned out.



To avoid burnout:

- Know yourself** Learn what aspects of the work are **easiest** and **hardest** for you. Gather support for the hardest parts.
- Pace yourself** Plan **breaks** into your schedule to recover a calm, friendly demeanor.
- Get help** If you can, gather a **team** so you can lean on your complementary strengths.

LET GRATITUDE BE YOUR GUIDE

How can you tell you are doing PNI right? Listen for **gratitude**.

Say you're working on a project, talking to people, gathering stories, supporting story sharing. How can you tell if you're doing it right? **People will thank you.** Once in a while, somebody will notice what you are doing, appreciate it, and tell you. If that never happens, your project needs more work.

Should you ask people what they think of the project? Yes. That's useful. But **the gratitude test works best when you don't ask.**

Here's an example of a spontaneous expression of gratitude from a real project.

Thank you for this opportunity to share and learn. It's great to know someone cares.

When people say things like that, you are on the right track.



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Apple on bench <https://www.flickr.com/photos/fouquier/42053952234/>

Interview https://www.flickr.com/photos/usfws_alaska/35244556313/

Gratitude [https://commons.wikimedia.org/wiki/File:2019_LES_Appreciation_Day_0192_\(49098624143\).jpg](https://commons.wikimedia.org/wiki/File:2019_LES_Appreciation_Day_0192_(49098624143).jpg)

TRANSCRIBING STORIES

How should I transcribe a conversation in which people share stories with me?

What should I leave in? What should I take out?

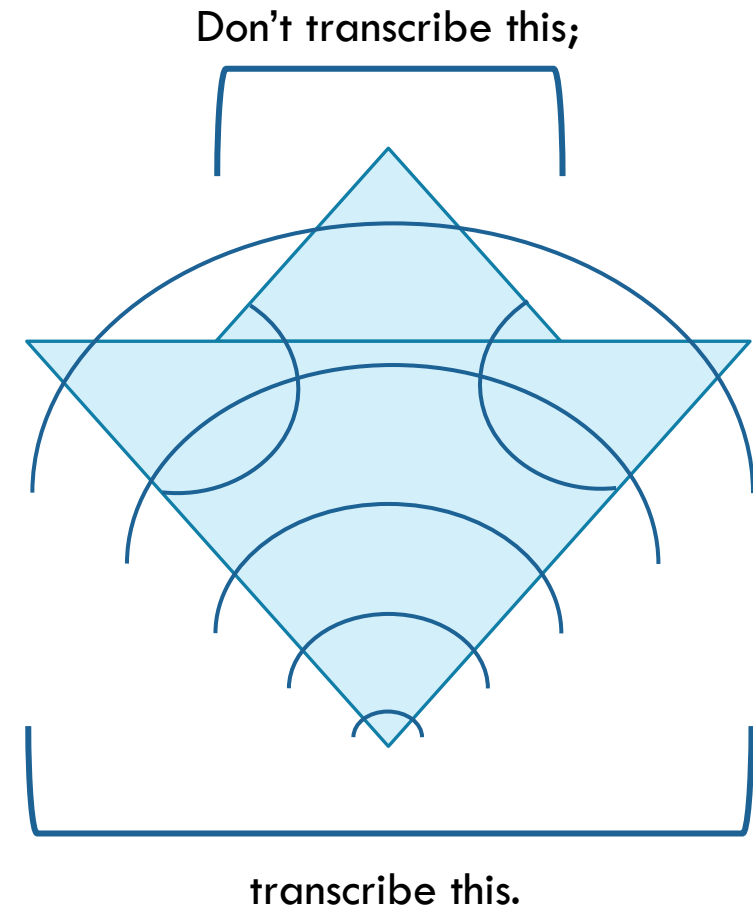
How can I capture both what they said and what they meant?

CAPTURE A STORYTELLING EVENT, NOT JUST A STORY

Don't start transcribing when the events of the story begin. Start transcribing when the **storytelling event** begins.

If you can, include the abstract, the story proper, its coda, and any relevant follow-up conversation. This will usually only be a few extra sentences, but don't leave them out.

If the **audience** made relevant comments or asked questions during the storytelling event, include those as well.



PRESERVE EMPHASIS

During a storytelling event, **emphases** communicate intent and meaning. Capture **how** people tell their stories, not just the words they use.



We knew what to do.

They didn't.

We *knew* what to do.

We just couldn't **do** it.

We knew *what* to do.

But we didn't know **how**.

We knew what to *do*.

But we didn't know what to **say**.

A transcript without emphases cannot distinguish between these (quite different) stories. Use **bolding** or *asterisks* to mark emphasized words.

CATCH HESITATIONS AND REFRAMINGS

Breaks, irregularities, hesitations, repetitions, and confusions can be important indicators of **negotiations** as stories are being told. Keep them intact.



The story fragments on the left would be misrepresented if only the cleaned-up versions on the right were available. This doesn't mean you *can't* create cleaned-up stories; but make the original, messy stories available as well.

You can... it feels as if... How can I put this?
I don't trust them anymore.

I don't trust them anymore.

It's a joke, really, and not quite a joke, but a little bit
of personal experience. I, personally, feel that...

My personal experience has
been that...

I just, last year, it's not specifically – I don't think,
specifically someone, it's more – it feels almost like a
system issue. A lot of my work is about getting –
well, one of the areas is getting information out.

A lot of my work is getting
information out.

MAKE IT MAKE SENSE

People often talk in bits and pieces, starting and stopping. That doesn't mean you can't represent what they said in complete sentences. Use **punctuation** to clarify their meaning, as you understand it from the recording you heard.



It's not a problem really it's just he didn't tell me what he was thinking and so I was confused is all.

So he understood even though the short term outcome was not his favorite he felt and I was surprised and happy with that really felt that the experience had been worthwhile.

It's not a problem, really; it's just -- he didn't tell me what he was thinking, and so I was confused, is all.

So he understood, even though the short term outcome was not his favorite, he felt -- and I was surprised and happy with that -- really felt that the experience had been worthwhile.

If you encounter a real word salad, you might have to remove a few words, or add a comment, for clarity. But usually you can use punctuation to capture people said *and* what they meant.

CAPTURE SOCIALLY SIGNIFICANT SOUNDS

Most transcripts ignore background noises like laughter, muttering, the sound of shuffling feet, and silence. But when someone is telling a story, such **social cues** can be useful indications of what is going on. Simple notations such as [laughter] and [long silence] can be helpful.



And he gave me an interesting difference. He said, you know, [another problem is] much **worse**. (laughter) That's the first time I heard that, huh? (laughter) {Sure.}

When I came into the company, they said, well, you know, you work on [a process] because **everybody's** got to take a turn there, do their **time** {laughter} with these stupid [people] {Is that so?} {laughter} and you'll get to work with the normal people **later**.

In these transcribed bits of conversation, I have used square brackets [] to mark words I changed for privacy. Words in parentheses () are non-verbal sounds the storyteller made as they were telling the story. Words in curly brackets { } denote responses from the audience as the story was being told.

CAPTURE VERBAL, NON-TEXTUAL SIGNALS

Many of the verbal and visual cues we give each other in person are lost when our words are translated into unadorned text. **Descriptive notes** can help to preserve the spoken meaning (as well as possible) in text.



Everybody knows John's big on self-promotion, right? That's why he didn't want anybody calling it "his" project.

And she was like, "I will not allow this."

So the guy comes in and he's waving the form around like this, and he says, "Ma'am, we have received your complaint, and we are working to correct it."

Everybody knows John's big on self-promotion, right? [said sarcastically] That's why he didn't want anybody calling it "his" project.

And she was like [in a Darth Vader voice], "I will not allow this."

So the guy comes in and he's waving the form around like this [waving hand in air], and he says [mimicking a rude speaker], "Ma'am, we have received your complaint, and we are working to correct it."

Only describe how something was said when you can be reasonably sure that the teller would agree with the description. If you aren't sure, ask. If you aren't sure and can't ask, leave the note out.

HOW TO DRAW A STORY OUT OF A TRANSCRIPT

There are **four reliable indicators** that a story is being told in a conversation. If you want to find the stories in a transcript, you can use the four indicators to help you draw out stories.

Look for **personal pronouns**, like I, you, he, she, we, they. When people are describing facts or giving opinions, they use these words less often.

Look for **past-tense verbs**, like “did” or “said” or “tried.”

Look for **time references**, like “when” or “then” or “afterward,” or “morning” or evening” or “day.”

Look for **storytelling words**, like “one time” or “back in the day” or “I remember” or “happened.”

If you have a transcript with a mixture of stories and other bits of conversation in it, **mark each instance** of each of these word categories. The stories will have more markings in them. If you do this with several documents, you will stop needing to mark the indicators explicitly. The stories will just jump out at you.

“Sometimes it does have to do with cultural differences how illness and medicine are regarded in other countries because **we** have a very Western view here and not all of our patients come in with a Western view. And some of it has to do with family and how **you** tell families. **I remember** a **day** when this woman **was** visiting our hospital **for the first time**. It **was late in the evening when** the consultation **was over** with the doctor. **She walked** out crying, and **I asked** her what **was happening**. **She said**, ‘I am overwhelmed with the amount of information **I received** from the doctor.’ And **I said** to **her**, ‘Don’t worry, that is why **I** am here.’ ”

IMAGE CREDITS

Rights: Public domain unless noted. Disclaimer: None of these people are actually doing or saying anything related to my words. I just look for situations and facial expressions that seem to match the messages I want to convey.

Boy in overalls <https://www.flickr.com/photos/usnationalarchives/7496109010/>
Nervous man <https://www.flickr.com/photos/internetarchivebookimages/14758960595/>
Women with books <https://www.flickr.com/photos/statelibraryofnsw/5748745311/>
Kids celebrating <https://www.flickr.com/photos/130139363@N07/18383930355/>
Woman looking unsure <https://www.flickr.com/photos/lselibrary/3989337633/>

FACILITATING STORY-SHARING SESSIONS

How should I set up and run sessions in which I invite people to share stories?

Should I just let people talk?

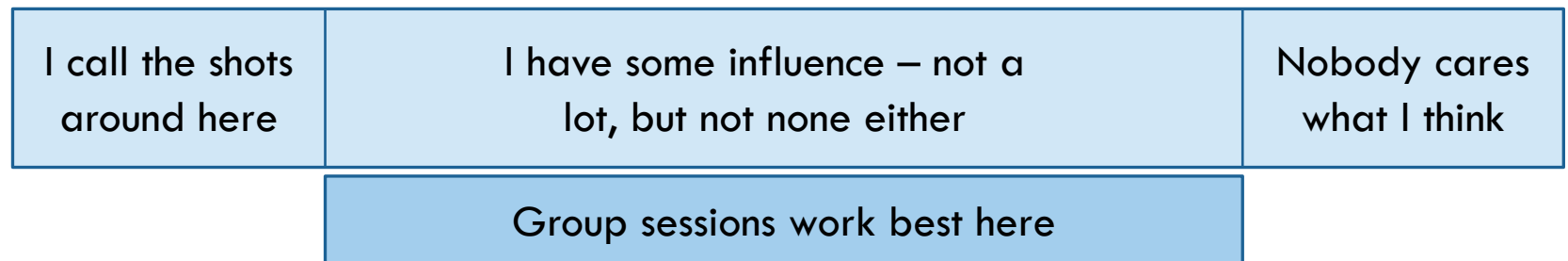
What if they don't tell stories?

How can I guide the conversation?

WHOM TO INVITE

Find the energy

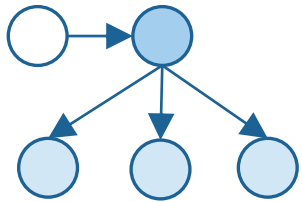
Invite people who are likely to **enjoy** exchanging experiences on the topic with a group of their peers. People who are used to being either obeyed or ignored tend *not* to enjoy group sessions. For people in either of those groups, interviews (individual or group) are a better option.



Isolate the power

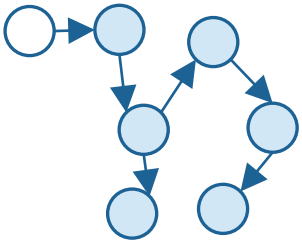
Keep people with different levels of power in the community or organization **apart** during story sharing. Mixing power levels will prevent people from speaking freely about their experiences.

HOW TO INVITE PEOPLE



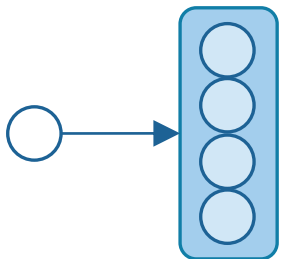
Chains of command

Ask those in charge to tell people to attend. Requires a **hierarchy**, but one with some trust – when people *must* attend a session, will they *attend* to it?



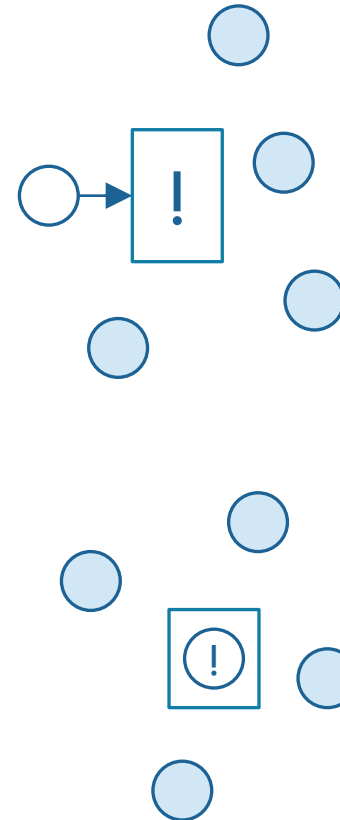
Networks of influence

Ask people to ask people to join. Requires a **network** of people who trust each other (and some who trust you).



Broadcast channels

Send a message to everyone on a mailing list or in a community. Requires a common sense of **identity** that confers a social obligation to participate.



Targeted advertising

Put up a **sign** that invites people to join. Requires knowledge of who might be interested, what might interest them, and where to put the sign.

Spontaneous enlistment

Put yourself and your invitation **in the right place at the right time**. Requires knowledge of good places and times to find people who might want to participate.

HOW TO HELP PEOPLE PARTICIPATE

Helping people participate with **payments**

When people **already** want to be part of the project, helping them participate is a win-win.

I like what you're doing, but I can't spare the time. Oh, you can help? Great, thanks, I should be able to join in.

When people have **no interest** in a project, paying them to participate will weaken it. Also, if people aren't interested in your project, maybe you need a better project.

So basically you're paying people for stories. Sure, I can do that. What do I have to say?

Thanking people with **gifts**

At the start of a story session, an inexpensive, respectful, unexpected gift sends a message of **thanks** and sets up a mild social obligation.

Wow, this is nice! I appreciate the gesture. Let's get started.

A too-large or disrespectful gift can seem **coercive**.

This is a little *too* nice. What do you want from me?

The best gift **tells a story** about the project and about participating in it.

Hey look, it's an aerial photo of our street! There's my apartment! Nice. Let's talk.

PREPARING A PHYSICAL SPACE

Story sharing works better in some places than others. These are some ideas that can help you create an inviting story-sharing experience for your participants. (Here I assume that you will split people into small groups.)

Capacity

Look for a room that seats twice as many people as you expect. More space will provide small groups with acoustical isolation.

Flexibility

Make sure people can move the chairs and tables around to suit whatever small groups they form.

Surfaces

If you plan to use exercises that involve sticky notes, have walls or tables ready for people to use.

Calm

Find a quiet, comfortable space, away from loud noises, where people can speak without distraction.

Clarity

As you explain your instructions, write or show them on a whiteboard or large sheet of paper, and *keep it visible*, so groups can check on it without having to ask.

Ambiance

Quiet instrumental music (played only when groups are sharing stories) creates cover for quiet conversation. A few snacks and drinks can help to set the tone.

Views

An interesting view, such as a large window on a street or park, can help people think of stories to tell. Just make sure the view is not *too* distracting.

Memory joggers

Bring along some objects or photos related to the topic. They can help people think of stories to tell. You can show them to people, hand them around, or simply make them available without mentioning them.

PREPARING AN ONLINE SPACE

Online story sharing can work as well as physical story sharing, but it requires more up-front work on your part. (Again, I am assuming that you will have small story-sharing groups.)

Capability

Find an online tool with the features you need: reliability, widespread connectivity, ease of use, breakout rooms, and screen sharing.

Flexibility

Make sure breakout rooms can either be assigned by you or joined and left by participants.

Surfaces

If you plan to use exercises that involve sticky notes, choose and become familiar with a shared document or whiteboard tool.

Calm

Master your online tools so you can help if anyone has a problem. If you plan to use an exercise, demonstrate the things people will need to do in it (create a sticky note, move it, rename it, etc).

Clarity

As you explain your instructions, show them on the screen, and *keep them available* so groups can check on them.

Ambiance

You can't bring snacks online, but you can surprise people with small gifts, like vouchers for a local coffee shop.

Views

Schedule some up-front time to help everyone see each other. Have each person take a minute or two to introduce themselves. Ask a simple ice-breaking question relevant to the project.

Memory joggers

Choose some images that are relevant and evocative, but not leading or constraining. Screen-share the images, send them in an email, or post them on a web site and give people a link to click.

PREPARING FOR YOUR PARTICIPANTS

Is their experience short or long ?	
Short: They may think they have little to add. Help them dig deeply into the details of their few experiences.	Long: They may blend many experiences into a generic scenario. Help them choose a <i>particular</i> experience to talk about.

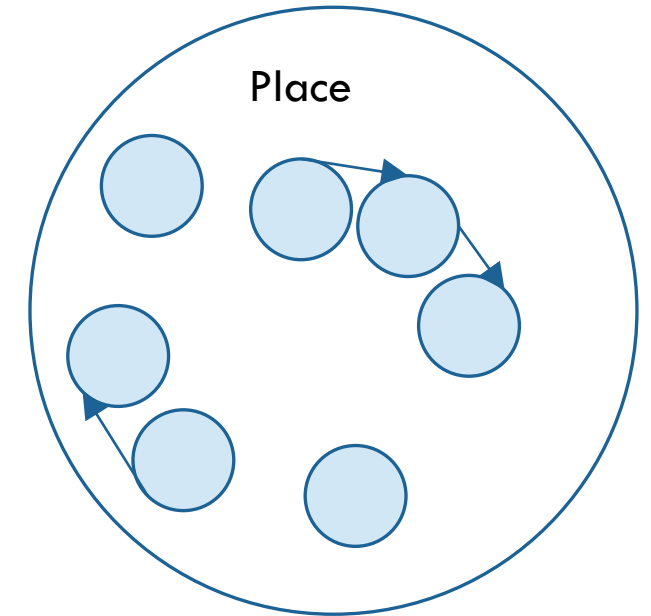
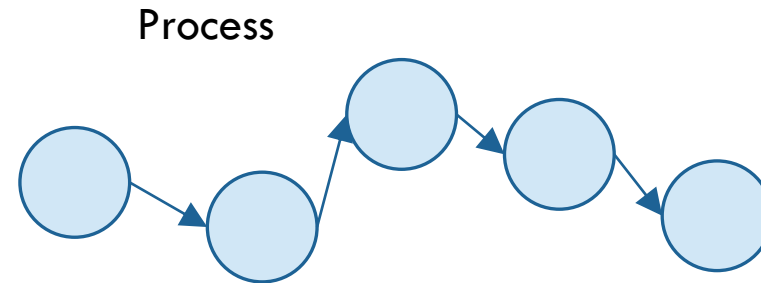
Do they think in concrete or abstract ways?	
Concrete: Don't waste their time with vast open spaces and confusing metaphors. Ask them to recount factual events.	Abstract: Don't waste their time with obvious reality. Let them spin fantasies about what could or should happen.

Are they young or old ?	
Young: Give them interesting activities that will capture their abundant energy.	Old: Don't ask them to jump around and do crazy things. Just listen to them with respect.

Do they want to be there, or did they get roped in?	
Want: Build the session around their energy and commitment to the project. Let them know that they own what happens.	Roped: Sell the session to the people in it. Explain that they have the power to control what happens, for the good of everyone.

And what about you? How do these questions apply to you?

PREPARING FOR YOUR TOPIC



Is your topic a **process** or a **place**? If you picture it as a landscape, do you see a **dominant path** through which its stories are likely to run? Maybe through the history of your community, or as children grow and learn? Or are there *many* possible paths through the topic, not just one? Is the entire space of the topic filled with stories?

Process: In these topics, stories flow naturally as memories move from one event to the next. The story of the topic lends itself to stories about the topic. However, the larger story may cover up stories of particular experiences. Help people pick out stories *within* the larger story to tell.

Place: Since there is no dominant path through this topic, help people find **smaller processes** they can walk through. For example, if your topic is sewing, ask people to walk through their experiences completing their first few projects. Or if your topic is “our town,” ask people about their transition from newcomers to long-term residents.

SETTING UP SMALL GROUPS

When?

Assignment

Decide in advance who should be in what small group.

Look at your nametag. Now look around the room and find the sign that **matches** the number printed under your name. Go and stand by that sign.

You know **exactly** who is coming, and you figured out in advance which groups will create the best result for everyone.

Rule

Design a matching game that you think will create good groups for your session.

Find two people whose ages are at least five years different from your own.

Find two people whose hobbies sound interesting to you.

Find two people who live on different streets than you do.

You know the **categories** of people who are coming. You think you know how to help them mix together well, and you think introducing a game will bring energy into the room.

Self-assembly

Let people decide for themselves how they will form groups.

Please **form** groups of three people each.

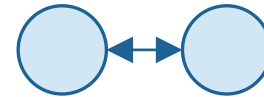
You know **nothing** about who is coming, or you know that they will be reluctant to follow your directions.

SMALL GROUPS: HOW SMALL?

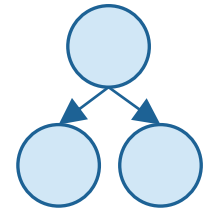
Avoid groups of 2

Stories flow better with **at least three** people. Groups of two are more likely to express opinions than share stories.

Not great

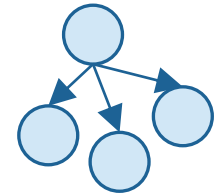
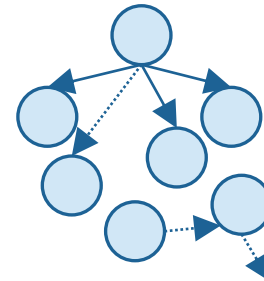


Better



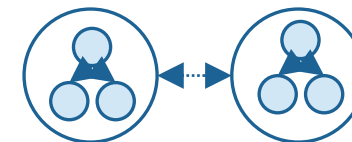
Avoid groups > 5

Unless people are very engaged in the topic, groups of 6+ tend to **drift** apart or **split** up into smaller groups.



Avoid 2 groups

With two groups, people can't help **checking** to see what the other group is doing. With three groups, people don't bother.



GETTING STORIES MOVING

How can you get people started sharing stories? Once you show people your eliciting questions, what can you do to get things moving?

The self-fulfilling prophecy

The way you introduce story sharing has a big impact on story sharing. Say something like:

When people get together to talk, they often trade experiences. *We're going to do that now, only we're going to be a little bit more deliberate about it – by starting off with these questions.*

Confidence is contagious

If you say this with **confidence**, people will believe you that stories will flow – *and stories will flow*. If you *don't* say it with confidence, stories *won't* flow. Build your confidence before you start by practicing your skills supporting conversational story sharing.

A gentle nudge helps

When people have split into groups and started talking, listen in to see if stories are being told.

In a **physical** space, you can see whether people are telling stories from across the room. The body language is hard to miss. If you don't see story sharing, slide over and listen. If you still don't hear stories being told, nudge the speaker with a question like:

I'm curious. Was there a specific time when you felt that way? What was that like?

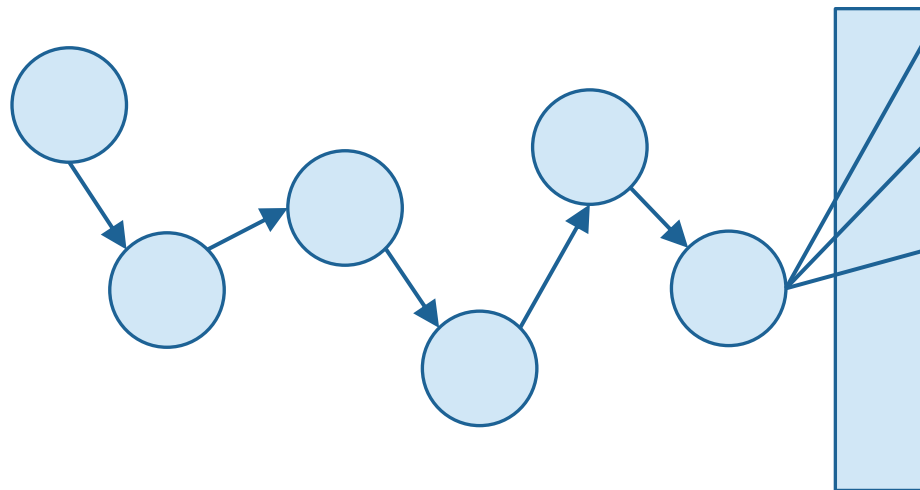
In an **online** space, tell people in advance that you will be popping in to each breakout room to see if they need anything. If you hear them sharing stories, pop out again. If not, nudge them toward story sharing.

WHEN STORY SHARING STOPS

Sometimes story sharing will start with a burst of energy, then slow to a halt. What should you do then? How can you help people **restart** story sharing?

First, wait.

Give people time to pick up the thread and keep moving. Lulls are natural and may resolve on their own. But if the wall of silence stretches on and on, help people across it with a connecting thread.



Ask **linking** questions:

So does the _____ in that story remind anyone of a **similar** _____?

Ask **what-if** questions:

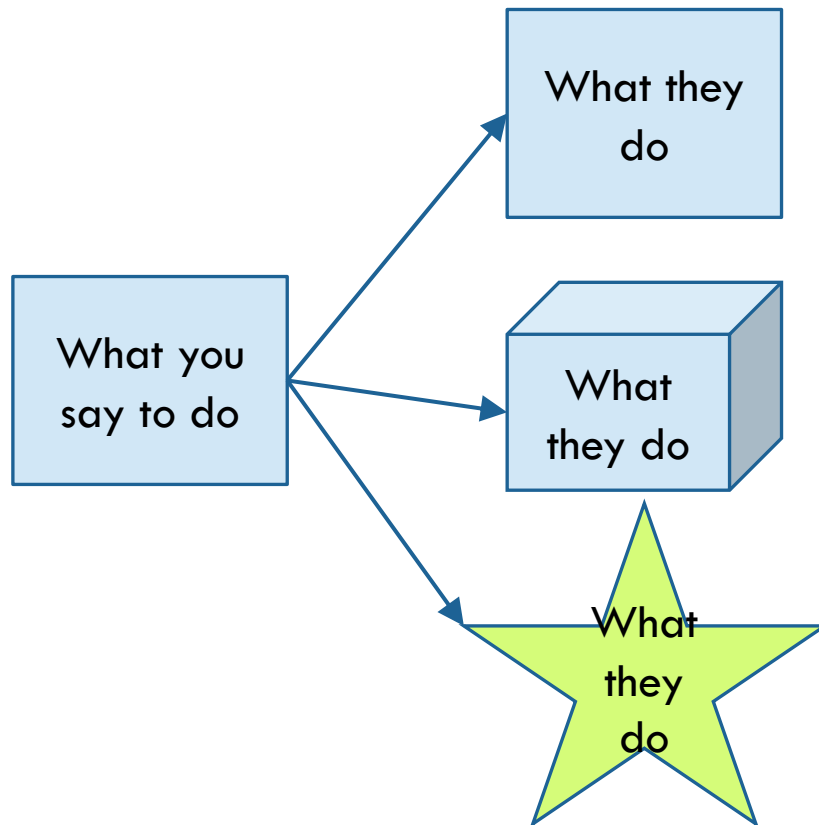
I wonder what **would** have happened if _____. Does that remind anyone of anything?

Ask for **extremes**:

Has anyone seen a _____ like that before? Maybe even **better/worse** than that? (But be careful not to imply that you want to see a performance!)

FINDING FACILITATION BALANCE

In a story-sharing session, people should feel **guided but not constrained**. Check your facilitation balance by watching how people follow your instructions.



If a group is doing *exactly* what you asked them to do, give them a **hint** that they are free to bring their own ways of being and thinking into the session.

If a group is doing something similar but not identical to what you asked them to do, **smile** and say nothing at all. This is the best possible outcome.

If a group has gone wildly off the rails, bring them back to the task by reminding them **why** it matters and **how** their stories will help the project.

HOW TO PREVENT A STORY-SHARING SESSION FROM TURNING INTO AN INTERVIEW

Sometimes people try to turn a story-sharing session into an interview, because they want *you* to be responsible for what happens. When you see this, gently push the responsibility and the ownership of the session back to them.

Don't model.

Reluctant story sharers will often ask for an **example** of the kinds of stories they should be telling. Don't give it to them. You will only get stories *exactly* like the example. If they really seem stuck, rephrase your story-eliciting questions or exercise instructions. Find a way to explain the task without providing a template.

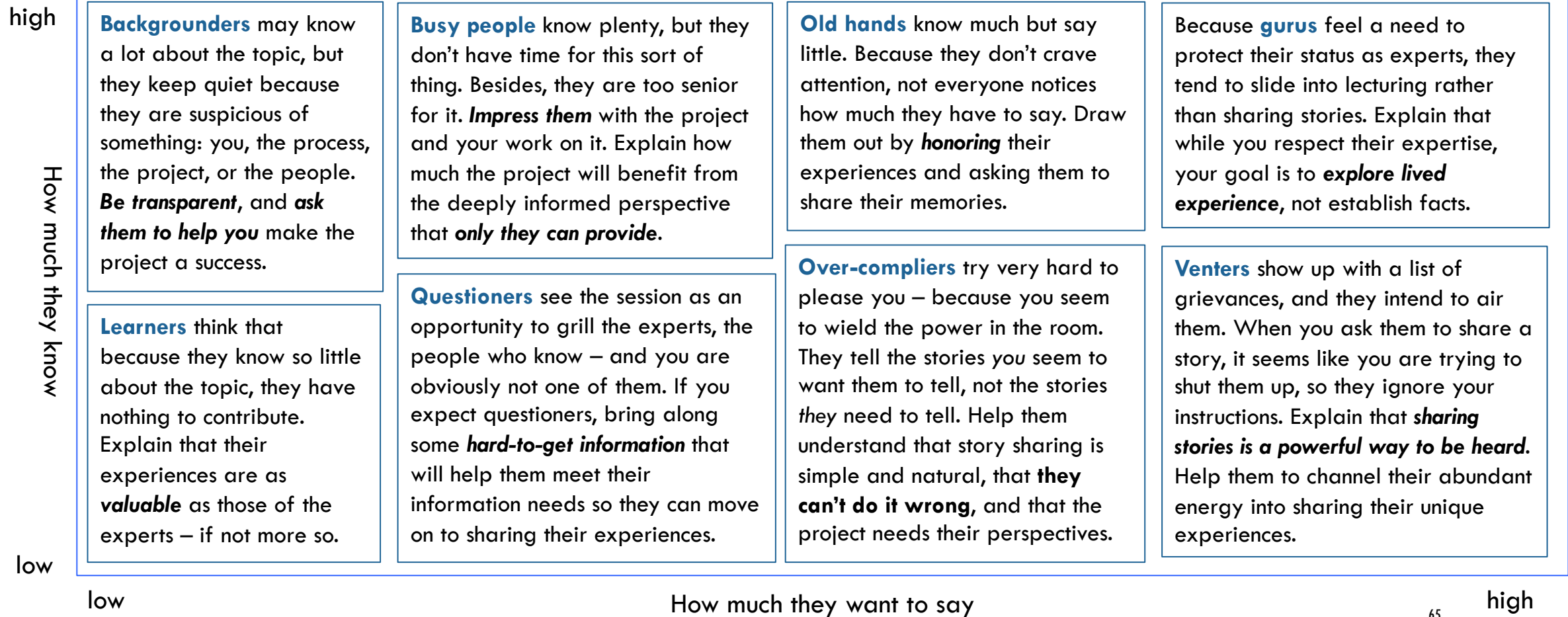
Pretend you don't know, even when you do.

Reluctant story sharers will often ask many detailed **questions**. They may be trying too hard to do things right, or they may be stalling for time. If it's one question, answer it quickly. But if it's a barrage of questions, start saying "I don't know" or "I forget." Then bring them back to the exercise.

Help them own what they build.

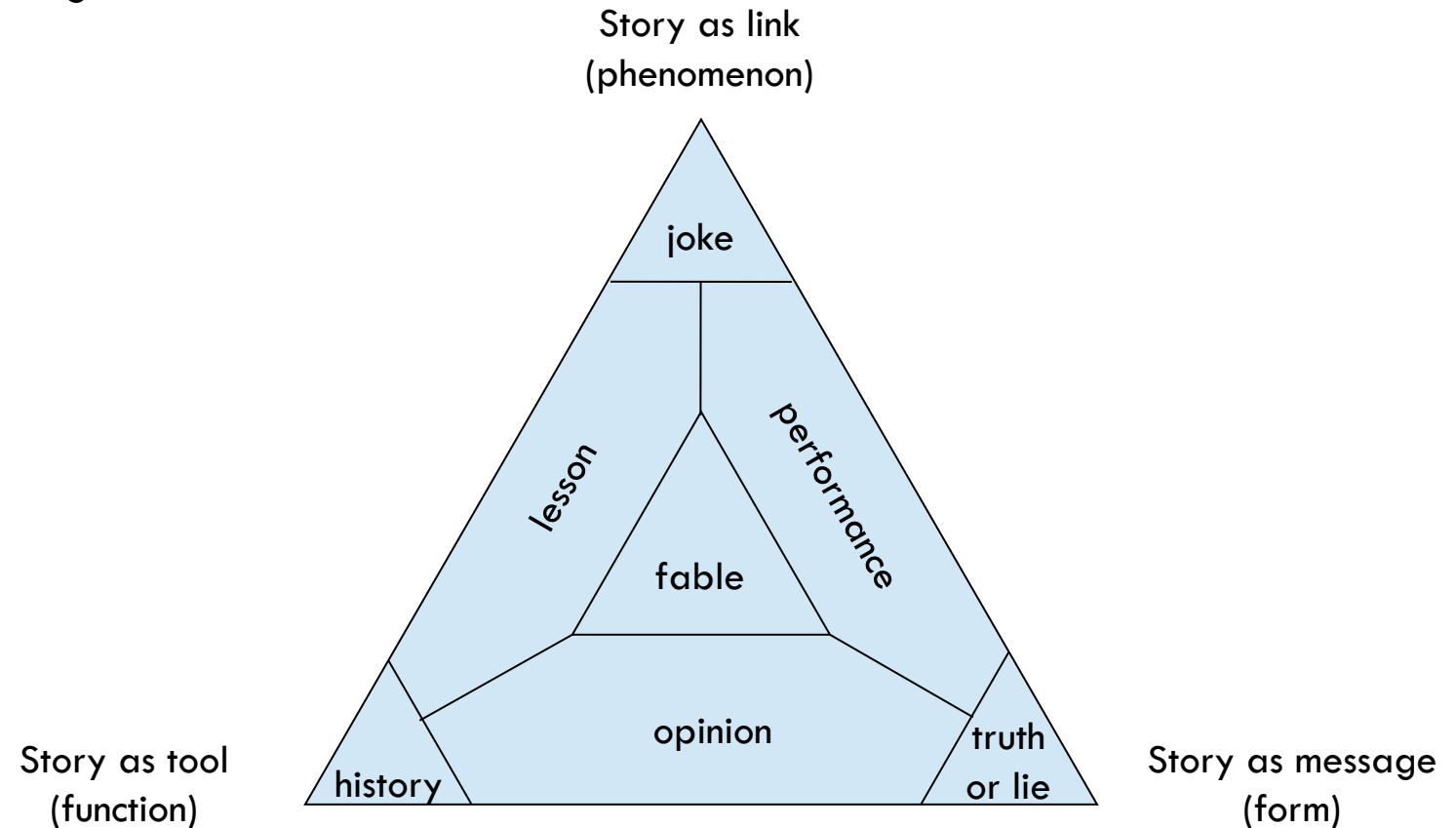
Reluctant story sharers will often ask you to **do things** for them, like choosing a story to retell or putting a sticky note in the "right" place. Or they will ask you to **evaluate** something they have done. Don't. It's *their* session. You are not there to judge, only to help. Briefly explain the task, then move on.

WHAT PEOPLE WANT (AND HOW TO WORK WITH THEM) IN A STORY-SHARING SESSION



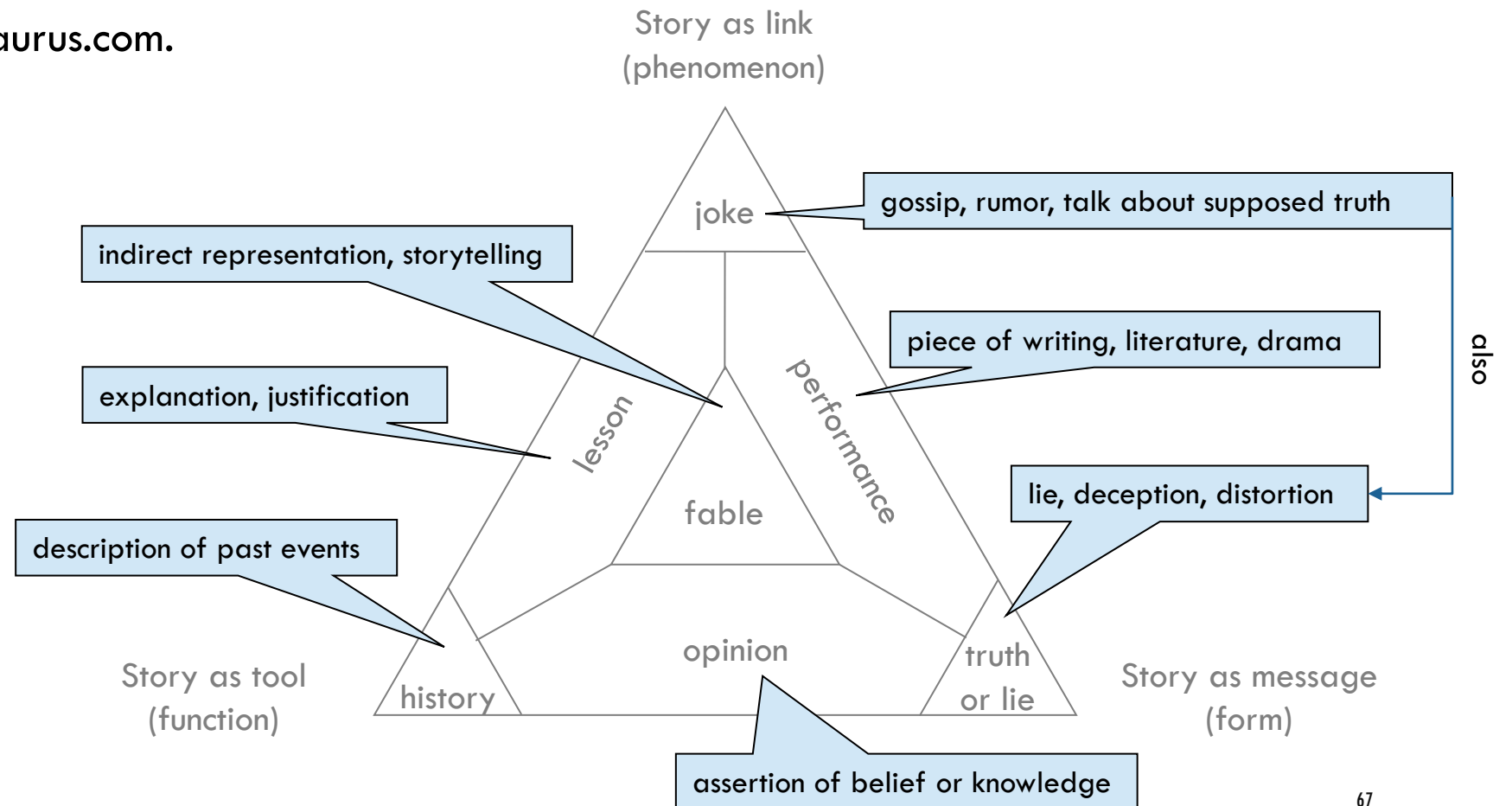
INTERPRETATIONS OF STORIES – COMMON MEANINGS

These are some common meanings of the word “story.”



INTERPRETATIONS OF STORIES – DICTIONARY DEFINITIONS

These are some **definitions** of the word “story” from thesaurus.com.

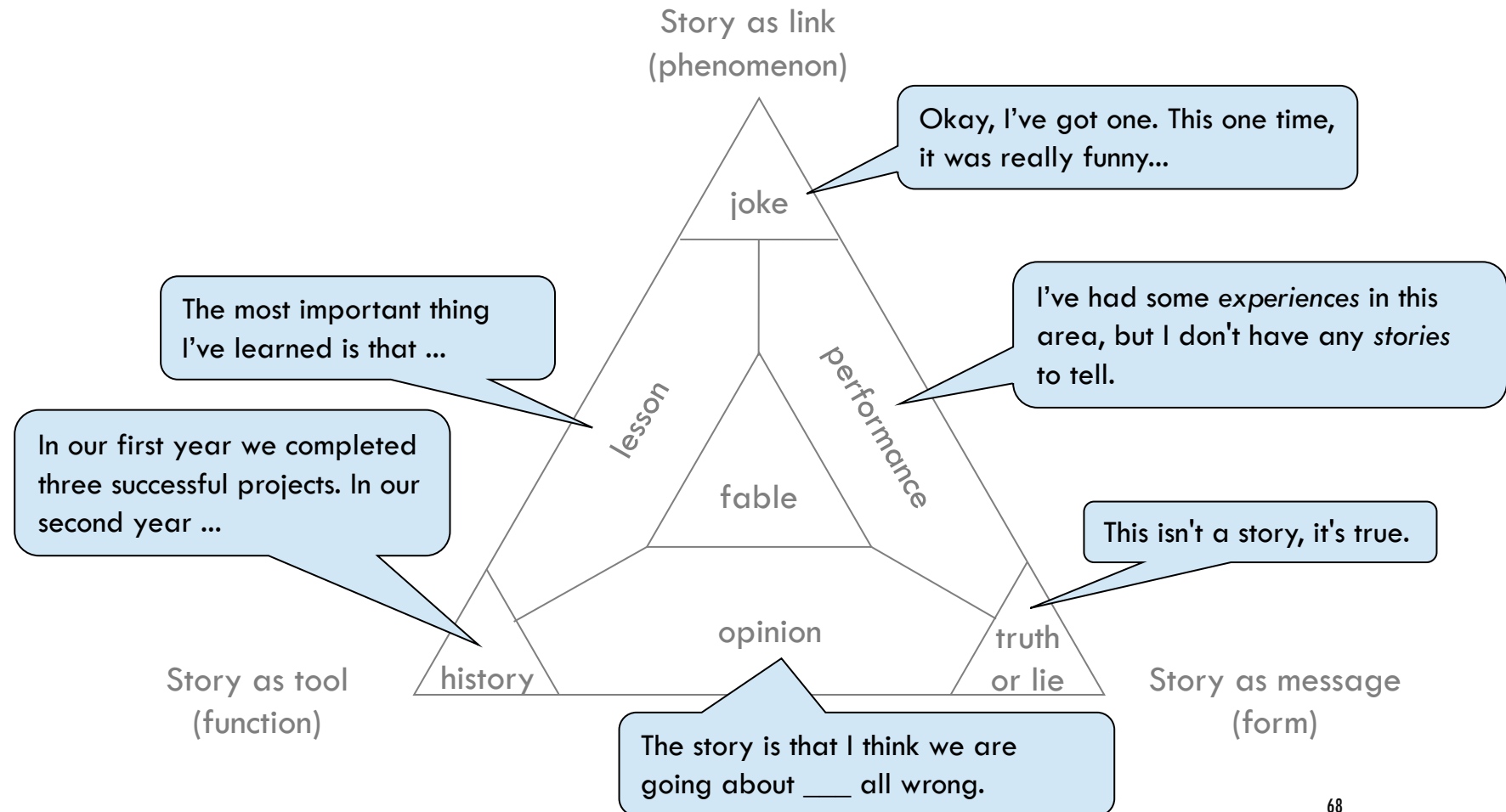


INTERPRETATIONS OF STORIES – COMMON REACTIONS

Many people gravitate to one corner of the triangle when they hear you say the word “story.”

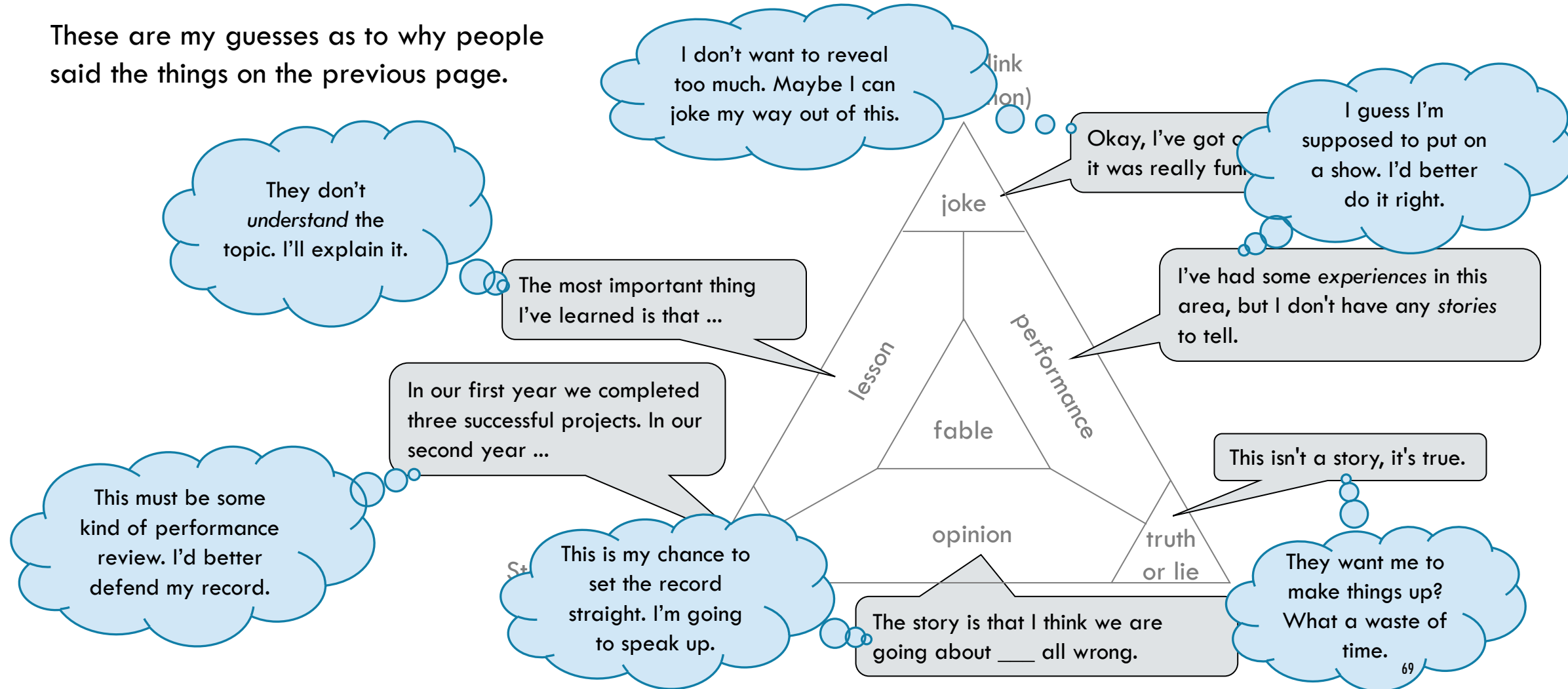
As a facilitator, your goal is to keep them as close to the **middle** of the triangle (where all three dimensions play a part) as you can.

These are some **quotes** (some verbatim, some paraphrased) from actual story-sharing sessions.



INTERPRETATIONS OF STORIES – COMMON MOTIVATIONS

These are my guesses as to why people said the things on the previous page.



INTERPRETATIONS OF STORIES – WHAT TO SAY

These are some things you can say to help people approach the center of the triangle.

We already know a lot about ____, but in this project we hope to explore **what** ____ **is really like** for people who are living through it. We'd like to hear about what has **happened** to you.

We hope that by **sharing** our experiences with each other, we can really begin to understand _____. Also, everything you say here is completely **anonymous**. Your name will not be connected in any way with what you say.

In our first year we completed three successful projects. In our second year ...

The most important thing I've learned is that...

Exploring our experiences in this project will help us to go **beyond opinions** to a deeper understanding of what ____ is like from diverse perspectives.

Sharing stories about our experiences is a **natural** thing; we all do it every day. Today we're just going to pay a little more **attention** to it than we usually do.

The story is that I think we are going about ____ all wrong.

Thanks so much for your **help**. We have big hopes that this project will make a difference in people's lives. Also, everything you say here is completely **anonymous**.

Okay, I've got one. This one time, it was really funny...

I've had some *experiences* in this area, but I don't have any *stories* to tell.

This isn't a story, it's true.

We'd like to explore what has **actually happened** to you on this topic. Was there ever a time when you felt ...

St
(phenomenon)

opinion

truth
or lie

COUNTERING THE DANGERS OF STORY SHARING

These are some types of dangers you might see people reacting to in a story-sharing session, and how to deal with them.

Audience danger	Is this a good story?	Use what you know about conversational storytelling to send signals of deep listening and respectful curiosity.
Character danger	Will the people in my story mind what I said about them?	Ask storytellers to join you in respecting everyone's right to anonymity by leaving identifying details out of their stories.
Performance danger	Am I a good storyteller ?	Set your expectations low. Show how much you appreciate every story, even the shortest, messiest, not-quite-a-story stories. People will notice and be encouraged.
Self-disclosure danger	Is this going to hurt ?	Make it clear that people can choose to explore the topic deeply or superficially, as they like. Your purpose is neither to demand nor to prevent disclosure.
Technology danger	Will this end up on the internet ?	Be transparent about your technology choices. Be prepared to fall back to less intensive means of story capture (video to audio to transcript to notes) if necessary. Give participants the means to view, edit, or remove their stories after the session is over.
Community danger	Will they say I was the one who told ?	Learn as much as you can about the community or organization <i>before</i> you ask people to share stories. Don't put people into positions where the danger of sharing stories about the community is too great to overcome.

STORY-SHARING EXERCISES

Here are some group exercises you can use to help people share stories together.

Easiest to facilitate and participate

Medium difficulty

Hardest to facilitate and participate

Twice-told stories

4+ people, 60+ minutes
No other requirements

Timeline

3+ people, 90+ minutes
Requires a shared time frame (a common history or process)

Ground truthing

6+ people, 90+ minutes
Requires a shared document (a mission or values statement or a set of written rules)

Narratopia

3+ people, 90+ minutes
Participants must be willing to play a game; you must prepare game components

Landscape

3+ people, 90+ minutes
Participants must be able and willing to explore abstract concepts and nuanced mixes

Local folk tales

3+ people, 90+ minutes
Participants must be able and willing to explore potentially emotional extremes

TWICE-TOLD STORIES FOR STORY SHARING

4+ people, 60+ minutes. Prepare the same story-eliciting question(s) as you used for your interview.

5 minutes	Facilitator	Introduce the topic and the exercise.
2	Facilitator	Set up at least 2 groups of 2-4 people each. Aim for diversity within groups.
1	Facilitator	Read or show the story-eliciting question(s).
1	Facilitator	Start a separate recording device for each small group.
25+	Small groups	Answer the story-eliciting question(s) by sharing stories. Give each story a name. Write it down and say it on the recording. Also note who told which story. Give each person a chance to talk. Keep sharing stories until the time runs out.
5	Small groups	Talk about the stories you just told. Choose one story the whole group (or the whole community or organization) needs to hear.
5	Everyone separately	Answer questions about each story you told and about yourself.
10+	Everyone together	Someone (anyone) from each group, retell the story you chose. Talk about the stories and what they mean.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use (and record) breakout rooms for small groups.

NARRATOPIA (A STORY SHARING GAME)

3+ people, 90+ minutes. Before the session, go to narratopia.com. Download, print, and cut apart the elements of the game. If you expect to have more than six people, prepare multiple copies of the game. Prepare the same story-eliciting question(s) as you used for your interview.

5 minutes	Facilitator	Introduce the topic and the game.
2	Facilitator	If there are more than 6 people, set up small groups of 3-6 people each. Make sure each group has its own table surface to lay out the game pieces on.
1	Facilitator	Start a separate recording device for each small group.
50+	Small groups	Play Narratopia, following the printed instructions. Start the game with the story-eliciting question(s) the facilitator poses.
5	Small groups	Looking back over the stories you told, choose one story the whole group (or the whole community or organization) needs to hear.
5	Everyone separately	Answer questions about each story you told and about yourself.
15+	Everyone together	Talk about the patterns you see. If you have more than one group, retell the story you chose.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Open Narratopia's printable PDF files for question cards, connection cards, tokens, and token mats. Copy the text from each game element to a whiteboard shape. Lay out the shapes on the whiteboard as if it was a game table (put the "cards" in piles, etc). Ask your participants to play the game on the screen as if they were playing it in person.

TIMELINE FOR STORY SHARING

3+ people, 90+ minutes. No preparation is required.

5 minutes	Facilitator	Introduce the topic and the exercise.
2	Facilitator	If there are more than 3 people, set up small groups of 2-4 people each. Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Start a separate recording device for each small group.
5	Small groups	Choose a time frame you want to consider. It could be a shared history (“Ten years of cooperation” or a common experience (“A visit to the dentist”). Describe the start and end of the time period on sticky notes (“Ten years ago / Today” or “Arriving at the dentist / Going home”). Place the notes at the ends of a horizontal line on a wall, table, or giant piece of paper.
50+	Small groups	Looking back over your timeline, think of memorable moments that capture the essence of the topic . Remember crises and breakthroughs, dilemmas and decisions, mysteries and discoveries. Tell the story of what happened in each moment. Give each story a name , write it on a sticky note, and put it where it belongs in the timeline. Make sure everyone gets a chance to share at least one story. Circle any stories that stand out as especially relevant to the topic or pivotal to the timeline.
5	Everyone separately	Answer questions about each story you told and about yourself.
15+	Everyone together	Talk about the patterns you see. If you have more than one group, retell any circled stories.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use (and record) breakout rooms for small groups.

LANDSCAPE FOR STORY SHARING PREPARATION

3+ people, 90+ minutes.

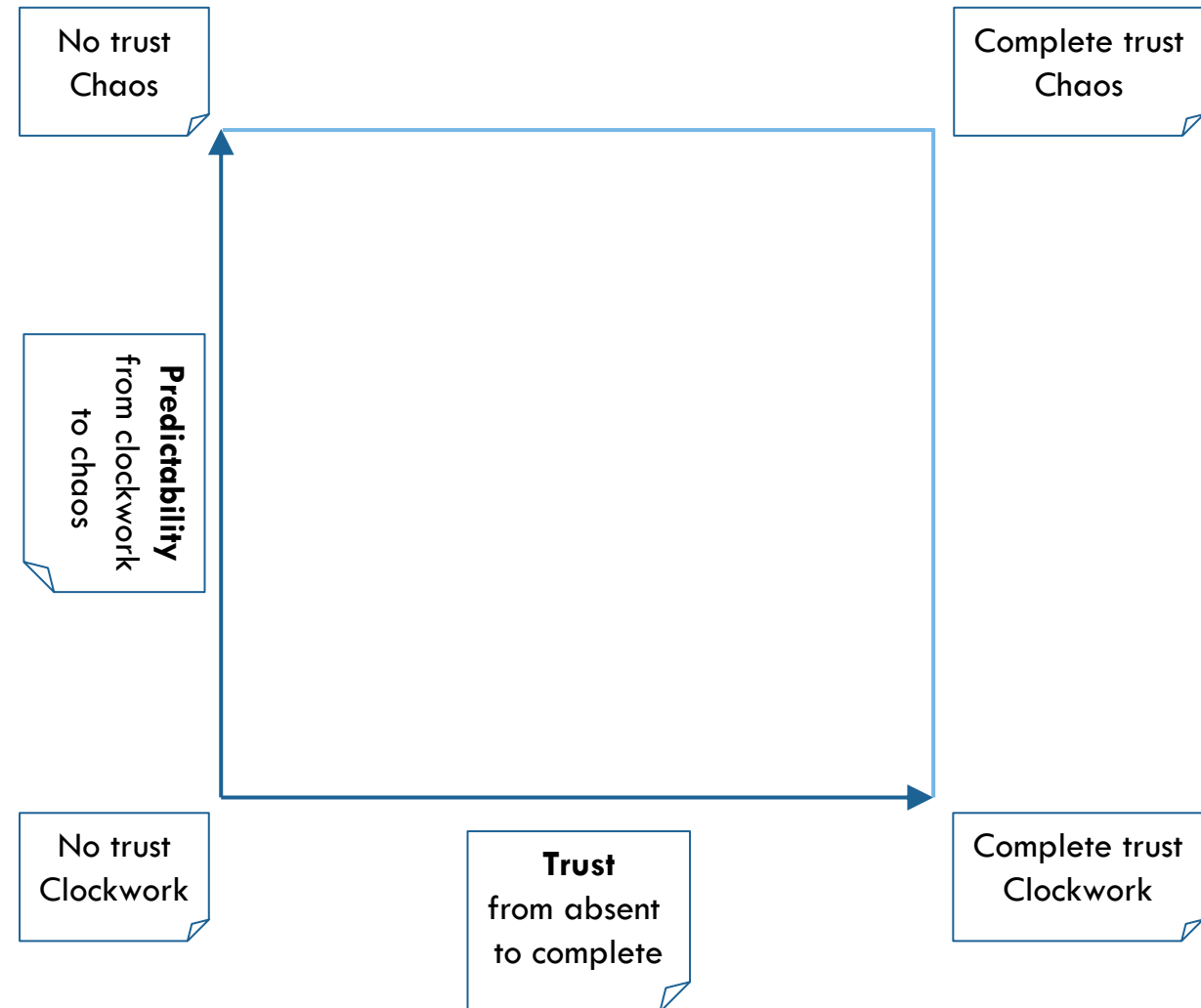
Before the session, choose two **dimensions** that are

- **meaningful** (they matter to your topic)
- **evocative** (they will bring stories to mind)
- **variable** (stories will range across them), and
- **independent** (not correlated).

Each dimension should go **from** something **to** something, like “Trust: from absent to complete” or “Predictability: from clockwork to chaos.”

Optionally, you can prepare 2-3 dimension pairs and ask people to choose a pair to work with.

You don't need any exercise materials, just a list of names.



LANDSCAPE FOR STORY SHARING

5 minutes	Facilitator	Introduce the topic, the exercise, and the pair(s) of dimensions.
2	Facilitator	If there are more than 3 people, set up small groups of 2-4 people each. Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Start a separate recording device for each small group.
5	Small groups	If there are multiple pairs of dimensions, choose one. Write your dimension names on sticky notes. Also write names for each corner of the space (e.g., “High trust, low predictability”). Use your sticky notes to mark out a space about one meter square.
50+	Small groups	Look over your space and think of moments that match the conditions in each location. Let the space remind you of stories you could tell. Have there been times, for example, when high trust met low predictability? Tell the story of what happened in each moment. Give each story a name , write it on a sticky note, and put it where it belongs in the space. Make sure everyone gets a chance to share at least one story. Circle any stories that stand out as especially relevant to the topic.
5	Everyone separately	Answer questions about each story you told and about yourself.
15+	Everyone together	Talk about the patterns you see. If you have more than one group, retell any circled stories.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

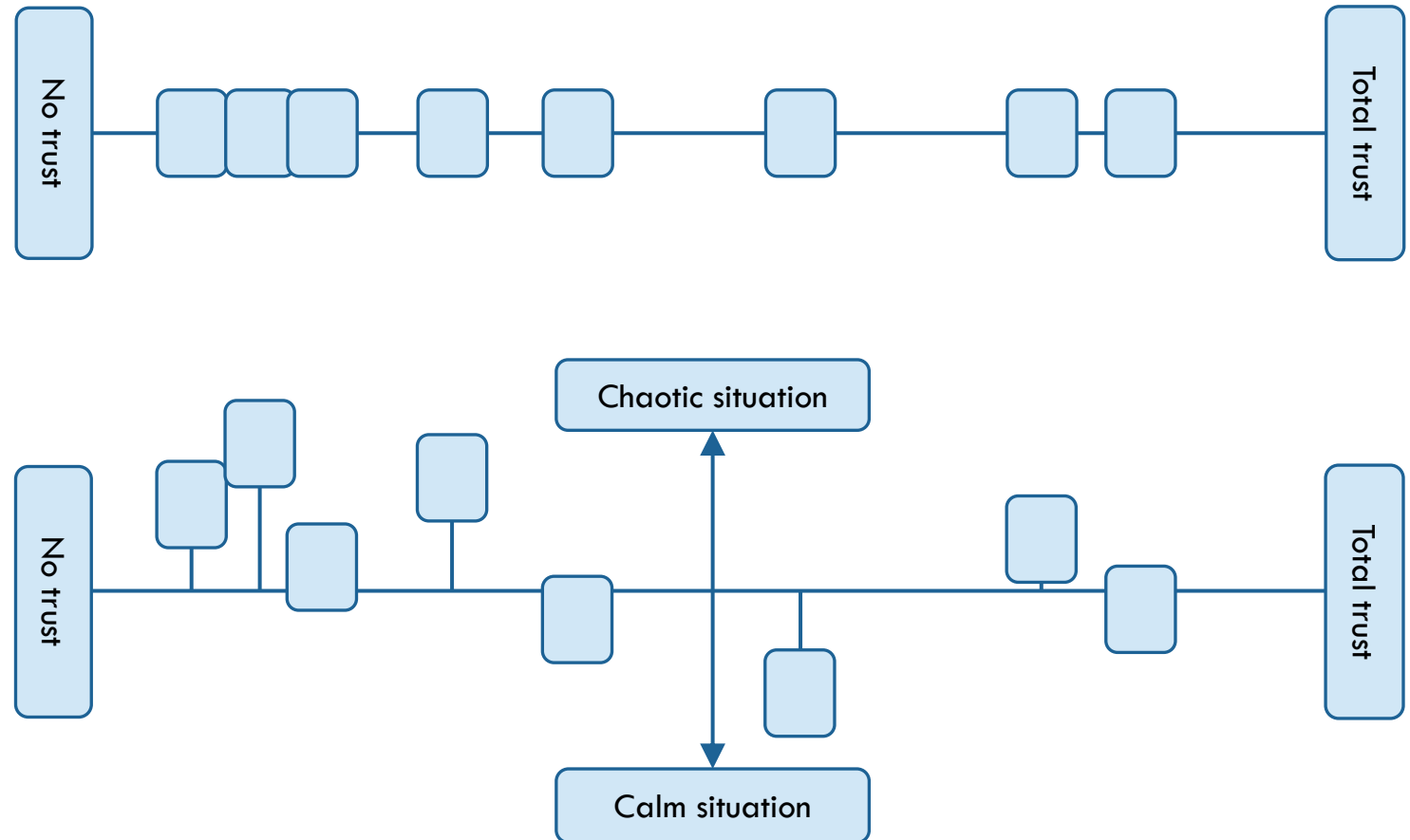
Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use (and record) breakout rooms for small groups.

LANDSCAPE VARIATION FOR STORY SHARING

You can do a landscape exercise one dimension at a time. First, ask groups to draw **a horizontal line** between two labeled extremes, then think of experiences they've had along that **spectrum**. (Give them the simpler, more concrete dimension first.)

Then, after they have placed several stories along the line, ask them to **move** each story up or down along a second dimension. Ask them to think of the stories like **balloons** that drift up or **stones** that fall down, depending on the second dimension.

After that, ask if any experiences come to mind that fill in the **gaps** in the two-dimensional space they have created.



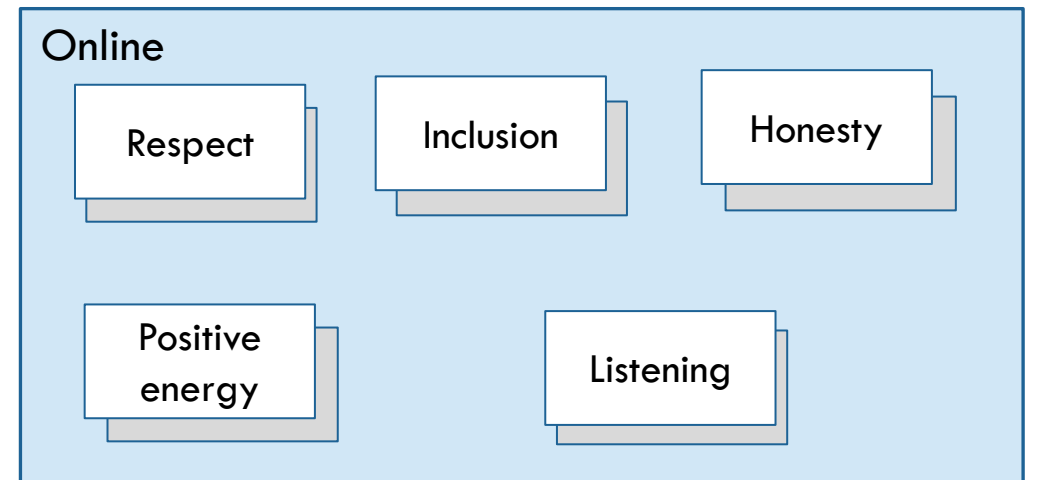
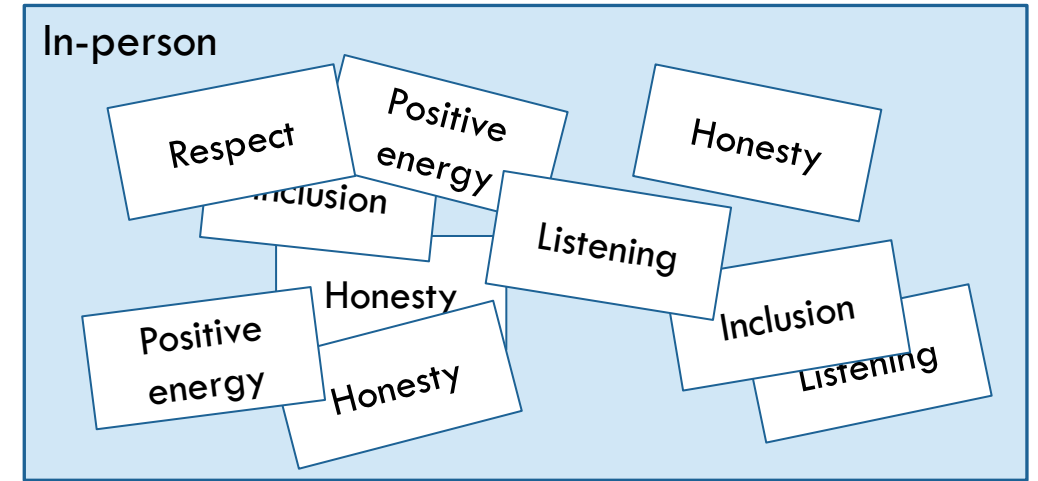
GROUND TRUTHING FOR STORY SHARING

PREPARATION

6+ people, 90+ minutes. Before the session, break up an official **document** (such as a mission or values statement) into **portions**, each of which covers one concept or statement.

- **In person:** Print each text portion on a sheet of **paper**. Fold each paper in half, tape it shut, and write a **descriptive name** (in large print) on the outside. Prepare a few identical copies of each portion. Just before the session starts, **scatter the papers** on a table in plain sight. Let people see the names on the sheets, but don't let them open them up.
- **Online:** At the start of the session, show or send people a document in which only the descriptive names of the text portions are shown. Later, give people a way to reveal the whole texts (e.g., with an HTML link, a hidden "spoiler" text, or a second "sticky note" that was originally hidden under the name).

Also, **choose two relevant aspects of experience** you would like people to explore as they share stories. The default set for this exercise is **beliefs** and **values**, but you can use any set of two aspects people are likely to find in most stories: emotions, conflicts, perspectives, problems, solutions, dilemmas, discoveries, helping hands, and so on. Choose aspects that you think will matter to the topic and to your participants.



GROUND TRUTHING FOR STORY SHARING

5 minutes	Facilitator	Introduce the topic, the document, the exercise, and the sheets of paper on the table.
3	Everyone separately	Look over the papers on the table. Choose one you find interesting. Take it back to your seat. Do not open it.
3	Everyone separately	Look at the words on the sheet of paper you picked up. Think of a time when those words mattered to you. Remember what happened at that time.
2	Facilitator	Set up small groups of 3-4 people each. Maximize diversity within each small group.
1	Facilitator	Start a separate recording device for each small group.
50+	Small groups	One person at a time: Tell the story of what happened at the time you thought of, the time when the words on the paper mattered to you. One listener: Jot down any beliefs [or other aspect of experience the facilitator has asked you to listen for] you hear in the story. The other listener: Jot down any values [or other aspect] you hear in the story. Afterward, both listeners, report back on what you heard, <i>without judgement</i> . Finally, together, open the sheet of paper and read what it says inside. Discuss any connections or gaps you see between the story, the beliefs and values [or other aspects] expressed in it, and what it says on the paper. Repeat this process until each person has told one story. If you have extra time, pick up more papers and go through the process again.
5	Everyone separately	Answer questions about each story you told and about yourself.
15+	Everyone together	Talk about the patterns you see. If you have more than one group, retell one story from each group.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use (and record) breakout rooms for small groups.

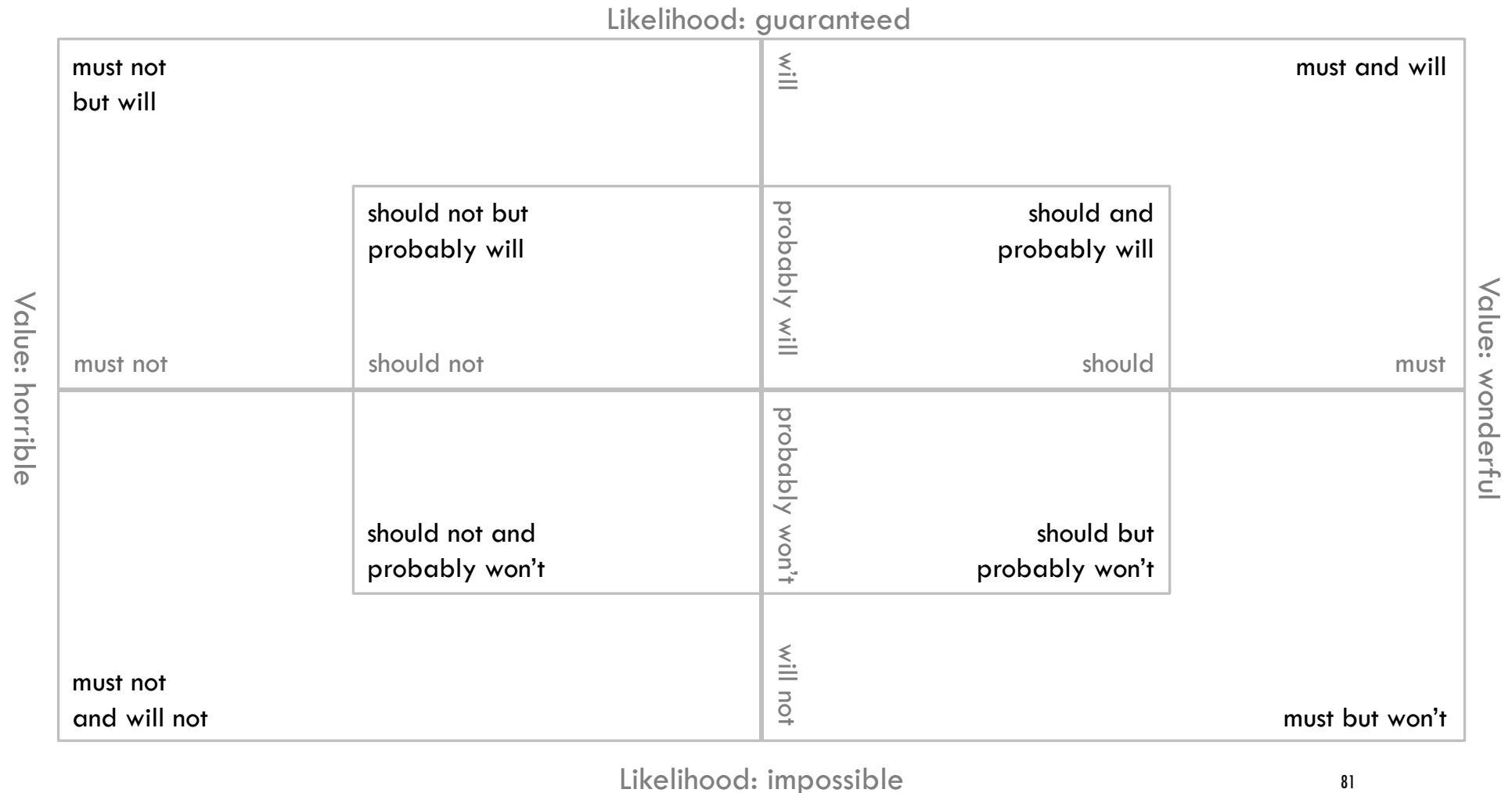
LOCAL FOLK TALES FOR STORY SHARING

PREPARATION

3+ people, 90+ minutes.

In person: Write or print this diagram on sheets of paper, letter-sized or poster-sized. Make enough so that each small group can have their own copy.

Online: Prepare one shared whiteboard surface with this diagram on it for each small group.



LOCAL FOLK TALES FOR STORY SHARING

5 minutes	Facilitator	Introduce the topic and the exercise.
2	Facilitator	If there are more than 3 people, set up small groups of 2-4 people each.
1	Facilitator	Start a separate recording device for each small group.
50+	Small groups	Look at the diagram. Think of times you remember that match the labels on it, with respect to the topic the facilitator asked you to talk about. For example, in the upper left-hand corner, think of times when something happened that “must not but will” happen again. Share these stories with each other. After each story has been told, give it a name . Write the story name on the diagram, and say it on the recording. See if you can think of at least one story for each of the labels on the diagram. Make sure everyone has a chance to share at least one story. When a story seems especially important to the group, circle it to show that it “stands out” to you.
5	Everyone separately	Answer questions about each story you told and about yourself.
20+	Everyone together	Talk about the patterns you see. If you have more than one group, show each other the story names you wrote on your diagrams, and retell your circled stories.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use (and record) breakout rooms for small groups.

BUILDING STORY CARDS

What are story cards?

Where do they come from?

How should I make them?

What options do I have?

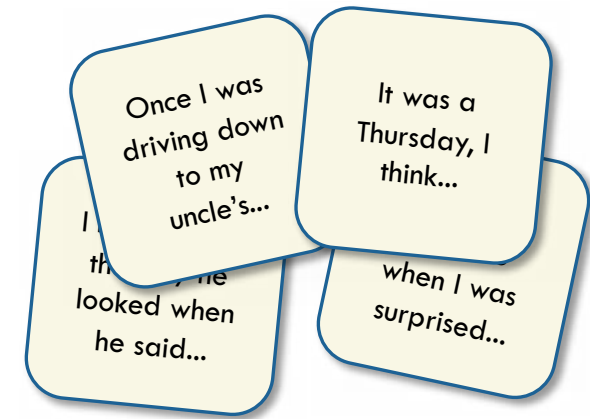
WHAT ARE STORY CARDS?

During a narrative sensemaking workshop, people must be able to work with the stories you collected in the project. To help them do this, you should prepare a deck of story cards, one story per card.

A story card is a **manipulable representation of a story**. Participants in your workshops will use story cards to move, sort, count, compare, array, and cluster stories, physically or online.

The simplest way to prepare story cards is to write or print the words of stories on them. However, there are other ways to represent stories, such as with images or objects, that may work better in some situations.

Prepare one copy of your story card deck for each small group of 3-5 participants you expect to have in your workshops.



TEXT-BASED STORY CARDS

If you have transcribed your stories, and you think your workshop participants will be able and willing to read your stories, you can prepare **text-based story cards**.

They should be:

- Big enough to be readable (no tiny fonts)
- Small enough to be moved around
 - In a physical setting, half or quarter page sizes are best
 - Online, if people can zoom in and out, cards can be smaller
- Clear and free of errors (no confusion)
- Graphically interesting (easy to skim; patterns jump out)
- Attractive (respectful, appreciative)
- Exactly what people said (transparent)
- Everything people said (include any answers to follow-up questions)
- But not too long (excerpt stories longer than a few paragraphs; mark excerpts as incomplete; make full stories available separately)

Skimmable
Attractive
Interesting

Working its way down

It's not a pretty story. The people who made the **mistake** would not own up to the mistake. It worked its way down. The person who ultimately got **stuck** with it had nothing to do with it. They were just the most **defenseless**. It's just the way we do things here. Nobody talks about it. It's impossible.

Remember trivial _____ | _____ memorable
Ending sad _____ | _____ happy
Trust absent _____ | _____ abundant

Source: **first-hand** second-hand rumor unsure

Feel: happy sad **angry** relieved enthused indifferent n.a.

Position: worker **manager** executive other

Age: <21 21-40 **41-60** 61+ declined

Verbose
Ugly
Dull

Title:
Working its way down

Text:
It's not a pretty story. The people who made the mistake would not own up to the mistake. It worked its way down. The person who ultimately got stuck with it had nothing to do with it. They were just the most defenseless. It's just the way we do things here. Nobody talks about it. It's impossible.

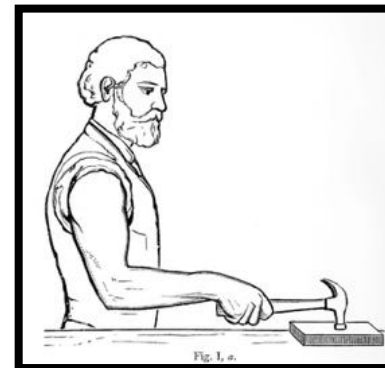
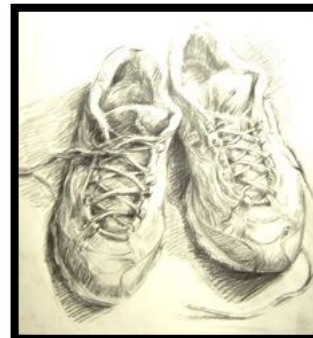
Questions about story:
Where did this story come from? first-hand
How do feel about the story? angry
How did it end? sad to happy: 9
How long will you remember it? trivial to memorable: 48
How much trust do you see in it? absent to abundant: 12

Questions about participant:
What is your position? manager
What is your age group? 41-60

SYMBOLIC STORY CARDS

If you cannot transcribe your stories, or your participants cannot read, or you want to surprise people with a different way of experiencing stories, you can play **audio** recordings of the stories, or you can read aloud or retell the stories yourself. You will need a longer workshop, and you may need to tell fewer stories, but this is an option.

As participants hear each story, give them a **printed or drawn image** that uniquely represents the story. For example, if only one story takes place on a boat, you can use an image of a boat to represent it. If you choose your images well, they can work just like text-based story cards. People will move, sort, and count them as they talk about the stories. If you're meeting in person, you can also use small **objects** to represent stories.



A NOTE ABOUT IMAGES

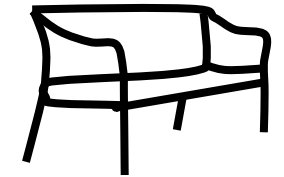
When selecting photographs or drawings for symbolic story cards (or to enliven text-based story cards), choose **simple images** that convey uncomplicated messages. Test your images to make sure they don't convey messages that aren't in the stories. Also, make sure they don't communicate cultural assumptions or stereotypes that exclude or offend anyone.

For example, what is this photograph about? Poverty? Or just a nap?



What about this photo?
What is it about?
Technology? Hats?
Suspenders?

If your actual intent had just been to represent **a story about a bench**, this photo is a better choice. It's hard to get anything from it but "bench."



An even better option is to **trace** an object from a photo to create an abstract icon for the story.

IMAGE CREDITS

Rights: Public domain unless noted. Disclaimer: None of these people are actually doing or saying anything related to my words. I just look for situations and facial expressions that seem to match the messages I want to convey.

Flock <https://www.flickr.com/photos/ianlivesey/51408303640>

Ambulance <https://www.flickr.com/photos/152930510@N02/48623187617/>

Sheep <https://www.flickr.com/photos/spongebabyalwaysfull/16534196290/>

Drawing of walking person <https://www.flickr.com/photos/internetarchivebookimages/14775033624/>

Scissors <https://www.flickr.com/photos/landscapeworld/51000823316>

Fork <https://www.flickr.com/photos/147117376@N07/29749125361>

Bronze cup <https://www.flickr.com/photos/139811037@N08/26047362121/>

Flowers <https://www.flickr.com/photos/woodspeople/33964966188>

Ship <https://www.flickr.com/photos/mustangjoe/21181637022/>

Bicycle <https://www.flickr.com/photos/dcoetzee/3504989093/>

Dancer <https://www.flickr.com/photos/internetarchivebookimages/14730352486/>

Shoes <https://www.flickr.com/photos/mariahoneill/4133705581/>

Guy with hammer <https://www.flickr.com/photos/elusivemuse/17157905064/>

Lego car <https://www.flickr.com/photos/152215952@N02/41078230050/>

Clay cup <https://www.flickr.com/photos/101561334@N08/14253157372/>

Key <https://www.flickr.com/photos/mlinksva/7908405252/>

Apple <https://www.flickr.com/photos/36856515@N03/7431363424/>

Man asleep on bench <https://www.flickr.com/photos/kojotisko/14328210134/>

Man on phone at bench <https://www.flickr.com/photos/image-catalog/19368563738/>

Just a bench <https://www.flickr.com/photos/165898707@N06/43650297110/>

HOW TO INVITE PEOPLE TO TAKE A NARRATIVE SURVEY

These are some things people **need to know** before they click on a survey link, and these are some ways to tell them those things.

This is for me .	<ul style="list-style-type: none">• Hello neighbor! We are contacting everyone on our street...• Our team is collaborating to improve how we...
I am qualified (and permitted) to do this.	<ul style="list-style-type: none">• If you have had experiences related to ____, we want to hear from you.• You have _____. We want to hear what that has been like for you.• If you have ____ for at least ____, this survey is for you.
I can play a part in this project.	<ul style="list-style-type: none">• We are hoping to ____, and we need your help.• Our goal is to ____, and we think you can help with that.• Please help us to _____. We need your help!
I might get something useful out of this.	<ul style="list-style-type: none">• We invite you to be a part of this effort, which will help all of us.• With your help, we would like to make ____ better.
I am in control of what happens.	<ul style="list-style-type: none">• Everything you say is anonymous, and you can change or retract it later.• We want to hear whatever you want to tell us about ____.

WHAT TO SAY IN THE SURVEY INTRODUCTION

These are some things people **need to know** after they click on a survey link and before they start answering the questions in the survey. Help them to meet these needs in your – brief – introduction.

I can answer these questions.	<ul style="list-style-type: none">• We would like to ask about your experiences with ____.• Please look back over your experiences with ____ over the past ____.
This is safe .	<ul style="list-style-type: none">• Choose whichever questions you would like to answer.• Every question is optional. Say as little or as much as you like.
This is interesting .	(As the person skims the form, they can see that it is well-written and attractive, and they can see that its questions are thought-provoking. Filling out the form looks like it might be an interesting experience rather than a tedious chore.)
By doing this I am playing a part in this project.	<ul style="list-style-type: none">• We are eager to learn from your experiences.• We will be using what you tell us in a series of discussion sessions.• You are invited to join the sessions; for more information click ____.
I am in control of this.	<ul style="list-style-type: none">• Everything you say is anonymous, and you can change or retract it later.• If you have any questions or problems, contact ____ at ____.

SURVEY DOS AND DON'TS

Here are some things that work better and worse in online story surveys.

Do	Why?	Don't	Why not?
Provide a big box to write the story in. (It's even better if the box is expandable.)	If the box is small and fixed, people will take it as an instruction to say little.	Don't require answers.	Required answers are neither participatory nor respectful, and they scare people off.
Ask emotional questions first and factual questions last.	Emotions are stronger closer to the story. Up-front factual questions seem interrogatory.	Don't ask too many questions (or list too many answers).	People will stop paying attention, and their answers will mean less.
Include an "other" write-in option, plus "not sure" and "rather not say" options.	When you give people multiple ways to not respond, you can learn even though they didn't answer the question.	Don't split up the survey onto multiple pages.	People need to look over the whole thing to understand the context and decide which story they will tell and how much they will say about it.
Speak plainly, respectfully, and inclusively.	People who feel safe and respected tell useful stories.	Don't use jargon or complicated words people won't understand.	Intimidated people tell defensive stories.

GATHERING ENERGY FOR YOUR SURVEY

If your first survey invitation gets you all the stories you need, that's great! But it's not what usually happens. You might need to **ask people 2-4 times** to participate.



- The first invitation lays out the project, explains what people will get out of participating, and explains what will happen when they do.
- The second invitation is mostly the same as the first, but it includes several "juicy" (anonymous) excerpts inserted, to show what is going on. *Build the case for the value of participation as the story collection goes on.*
- The third invitation has even more excerpts – plus (if you have them) a few statements of gratitude or appreciation.
- The last invitation has more (and longer) excerpts and more statements of gratitude – plus (if you have them) some tentative yet enticing patterns.

GATHERING-ENERGY DOS AND DON'TS

Here are some things to do and avoid when gathering energy for a survey.

Do	Why?	Don't	Why not?
Generate a sense of rising excitement that something special is going on.	Peer pressure and the fear of missing out are social forces you can draw on to help people feel ready to contribute.	Don't send out your first invitation without testing it.	Find a win-win situation <i>before</i> you ask people to contribute.
Tell the story of the ongoing project. Tell people how many stories you have collected and what they are like.	Use the engaging nature of stories and storytelling to draw people in to what is happening.	Don't plead with people or try to guilt them.	<i>They get to choose</i> whether they will participate. If it doesn't work, regroup and try again with a better pitch.
Keep your tone positive and hopeful, even if the topic is difficult.	Even if the topic is a sad one, people can still enjoy the experience of talking about things, and they can enjoy the sense of contributing to a positive solution.	Don't keep asking people even after they complain.	If anyone complains about getting multiple invitations, take them off your list. It's only respectful.

IF PEOPLE DON'T RESPOND

This can happen, even if you do everything right. If this happens, first, **reach out** to some of the people you invited and ask them why they didn't choose to participate. Then, based on what they tell you, consider these possibilities.

Maybe it's a **logistical** issue.

You might need a **new venue**. Look for other opportunities to talk to people – in the lunch room, at a conference, etc.

Maybe you need a **wider pool** of potential participants. See if you can tap into a new network or hierarchy of connections.

If people are too **busy** to respond, consider compensating them for their time with gifts or payments.

If this isn't a good **time** to do this project, find out when might be a better time.

Or maybe it's a **deeper flaw** in your thinking.

If people don't **trust** you, consider asking pivotal people in the community to vouch for you or your project. You might need to restart the project and include those people in your core team.

If people say they find the project **boring**, ask them what would make it exciting to them and worth putting their energy into.

If people say the project seems **hopeless**, ask them what would make it seem hopeful.

Maybe the **style of PNI** you are using is not the right fit for this context. Contemplate how you are using PNI. You might need to combine it with another approach or try something entirely different.

Finally, you might need to rethink your entire project – not only *how* you are doing it but also *what* you are doing and *why*.⁹⁴

CHAPTER SIX: NARRATIVE CATALYSIS

This chapter explains the concepts and methods of catalysis (that is, pattern discovery and exploration) in PNI.

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[What is narrative catalysis?](#)

[Catalysis principles](#)

[The catalysis process in brief](#)

[The catalysis process in detail](#)

WHAT IS NARRATIVE CATALYSIS?

What is this crazy thing?

Where did it come from?

What does it mean?

Why should I do it?

CATALYSIS IS LIKE (BUT NOT LIKE) ANALYSIS

The word “catalysis” is **the only jargon word in PNI** (besides “PNI”). You could say that PNI spends its entire jargon budget on that one word. Why? Because the difference between analysis and catalysis is one of the most useful aspects of PNI. Catalysis uses many of the same tools as analysis, but with an opposite goal: to **open up** participatory discussion, not to shut it down.

analysis



conclusions, answers, findings
definitively presented by those in power
passively absorbed by individuals
(and sometimes attacked)

catalysis



patterns, questions, puzzles
constructively provided by helpers
actively, playfully explored by groups of
participants working together
(and always challenged)

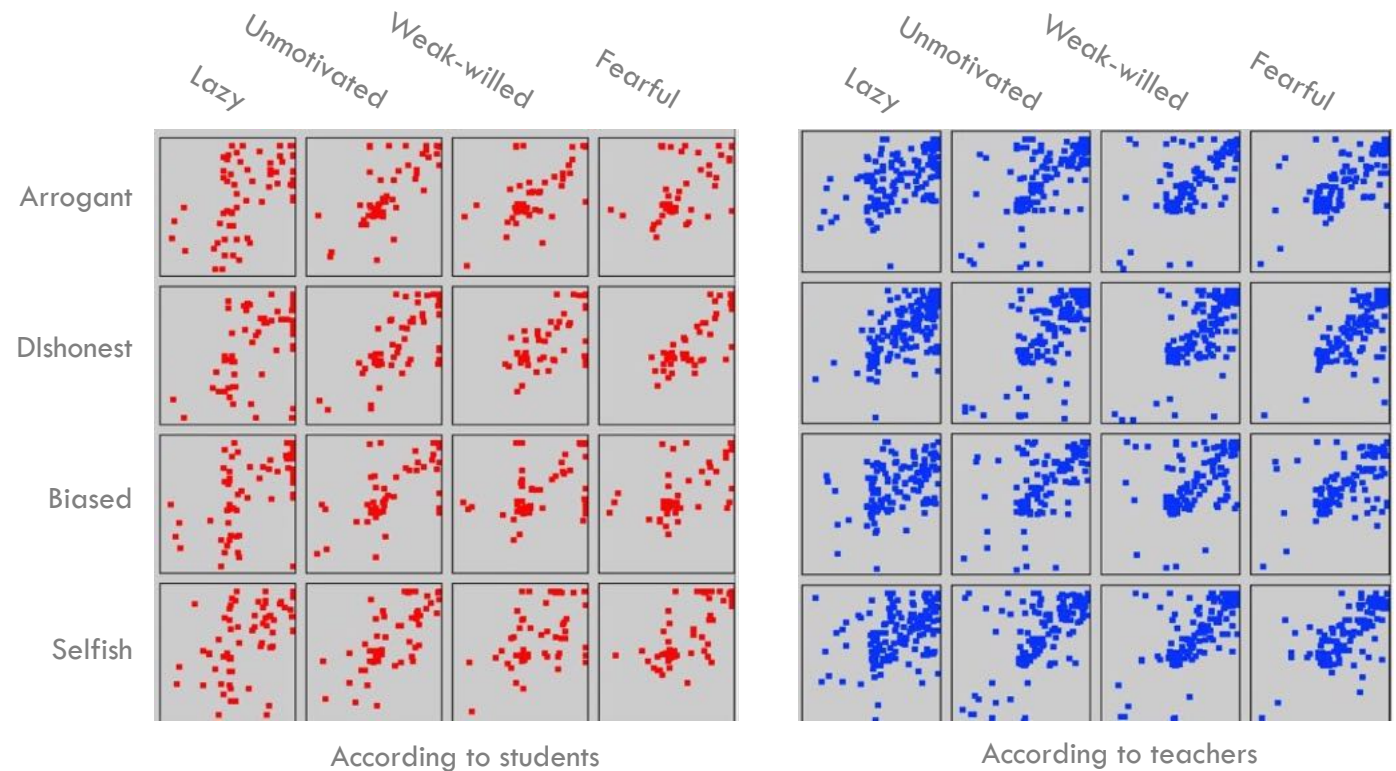
THE ORIGIN OF NARRATIVE CATALYSIS

These images are from **the project in which narrative catalysis was born**. To explore the best ways to help children learn, we gathered stories of classroom learning.

These graphs show answers to questions about difficulty (x axis) and misconduct (y axis) in stories, as read by students (red) and teachers (blue). The blue distributions seemed more strongly correlated. (We were not yet using statistics.)

In my analytical report, among other things, I noted that teachers seemed more likely than students to equate weakness with irresponsibility. One way to help children learn, I said, might be to avoid blaming them for their struggles. (This seemed obvious to me.)

To my surprise, the report was attacked, the discussion ground to a halt, and significant facilitation skill (not my own) was required to salvage the project – even though some of the people involved *agreed* with my interpretation of the pattern.



This was a **turning point** in the development of PNI. The failure of my analytical report to support participatory sensemaking led me to rethink the way I did story work. Afterwards, I began to develop the process and principles that became narrative catalysis.

WHY CATALYSIS EXISTS

The purpose of narrative catalysis is to resolve the paradox at the heart of participatory sensemaking.

To help people make sense of a topic using patterns you find in data, **you must tell them what the patterns mean.**

Most people are not trained in the interpretation of graphs and statistical results. Thus people who are not told what patterns mean have only two options: figure things out for themselves, or walk away.

Participatory Action Research requires that every person be included and accepted as they are. So the first option is unachievable, and the second is unacceptable.

The most effective way to resolve this paradox is to **provide multiple interpretations of each pattern.**

To help people make sense of a topic using patterns you find in data, **you must *not* tell them what the patterns mean.**

People who are told what patterns mean have only two options: accept what you say, or attack it.

The goal of Participatory Action Research is the energetic exploration of patterns in an atmosphere of safety and playfulness. So both of these options are unacceptable. They are neither safe nor playful.

CATALYSIS PRINCIPLES

What are the rules of catalysis?

What makes it unique?

What holds it together?

What makes it work?

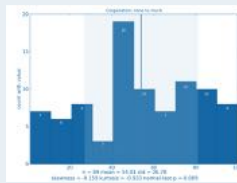
SEPARATE STATEMENTS

Subjective interpretations of patterns can be useful in sensemaking – as long as they are clearly labeled as such.

Therefore, all statements in catalytic materials must be **separated** into what is objective (anyone would agree with it) and what is subjective (not everyone would agree with it).

Pattern (objective truth)

A graph or statistical result



Observation (objective truth)

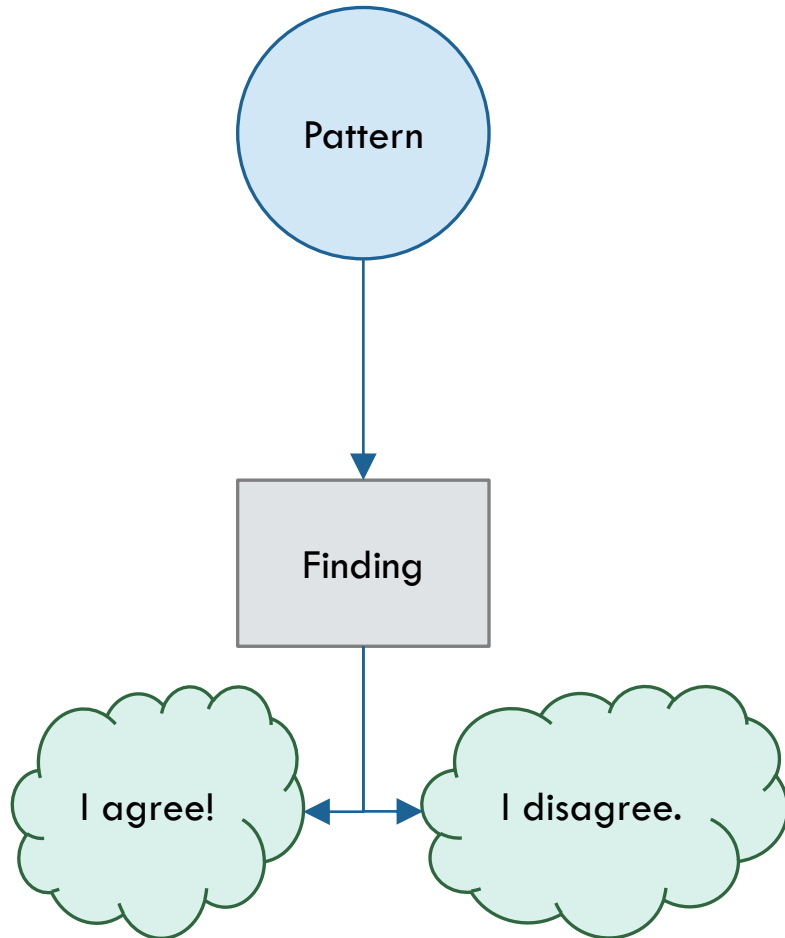
Things anyone can **see** and **agree** on
“Column 5 has 28 more stories than column 6”

Interpretation (subjective opinion)

What the observation **means** from one perspective
“Our lazy support staff are slowing us down.”

There must be **at least two** interpretations per observation
“Our support staff are working hard! They need support too.”

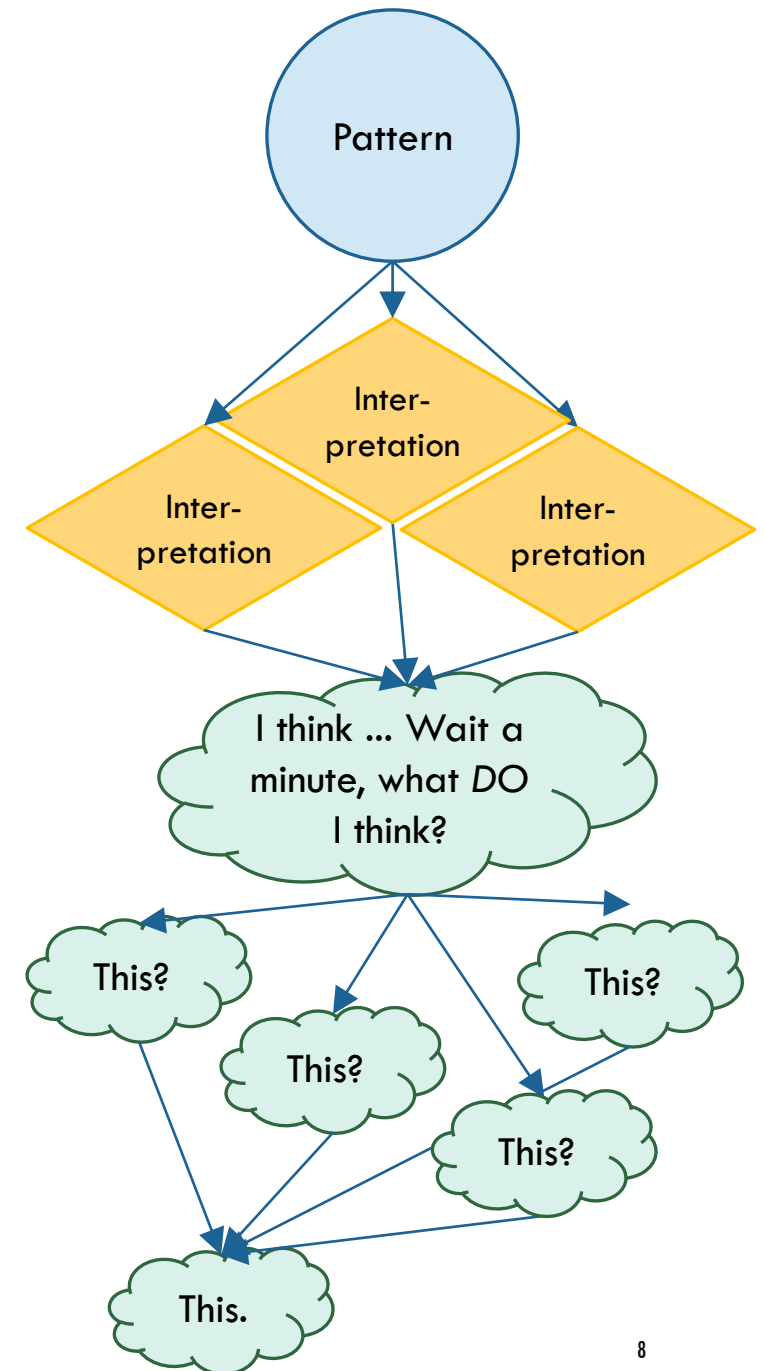
PROVIDE PROVOKING PERSPECTIVES



Generating multiple interpretations of patterns is the most **important, difficult, and rewarding** part of catalysis.

Coming up with explanations that actually make sense from opposing points of view is a skill that can be learned and improved.

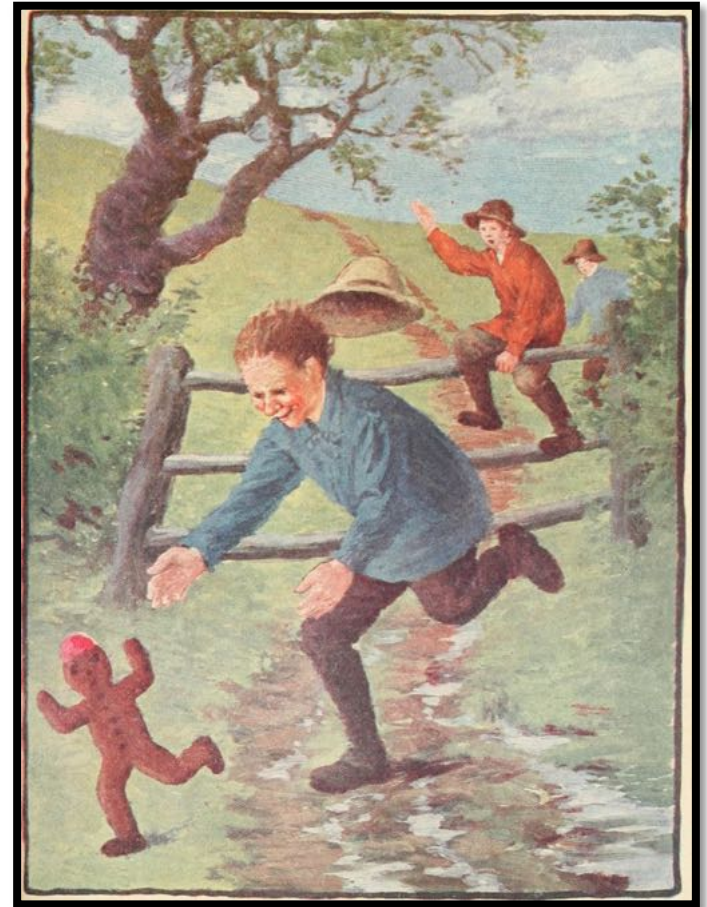
The process can be followed by one person or a group.



MAINTAIN MISCHIEF

The folk tale trope of the runaway food item, found across cultures, taunts us with the excitement of the chase.

*Run, run as fast as you can
You can't catch me
I'm the Gingerbread Man!*



In the same way, good catalytic material challenges project participants to **get up and run** after insights they can use – by using the material to make sense of what is going on in their community or organization and what it means to them.

Announcing that your catalytic materials are not only **deliberately ambiguous**, but *maybe* even wrong or misleading, entices your participants with the promise of the discovery – and ownership – of new and useful insights.

Why does this matter? Because though analysis can provide a filling meal, only sensemaking can create what people *really* need, which is solutions they can understand, control, and support.

EXPLORE EXHAUSTIVELY

The best way to remove the possibility of cherry-picking is to examine the whole tree: every fruit, flower, leaf, twig, and root.

This means:

1. Consider the time and resources you will have for catalysis when you decide what questions you will ask.
2. Analyze your data as completely as you can.
3. When you find that you have to leave out some data or comparisons, explain why.
4. Share your data with your participants and allow them to explore it with you.



PREPARE FOR PARTICIPATION

Getting catalytic materials ready for sensemaking is more like **building a game** than it is like writing a report.



A report has	A game has
A fixed beginning, middle, and end	A fixed beginning, but an unknown middle and end
A fancy cover, material, or location that conveys authority	A handy box that begs to be opened (then set aside)
No moving parts	Mostly moving parts
No instructions	Plenty of instructions, options, suggestions, and ideas
A single perspective	A cultivated garden of perspectives
A request for feedback	An invitation to create

Note: In WWS and in NarraFirma I speak of a “catalysis report.” I now think that was a mistake, and I plan to change it when I can.

THE CATALYSIS PROCESS IN BRIEF

How do you actually go about doing catalysis?

What are the steps?

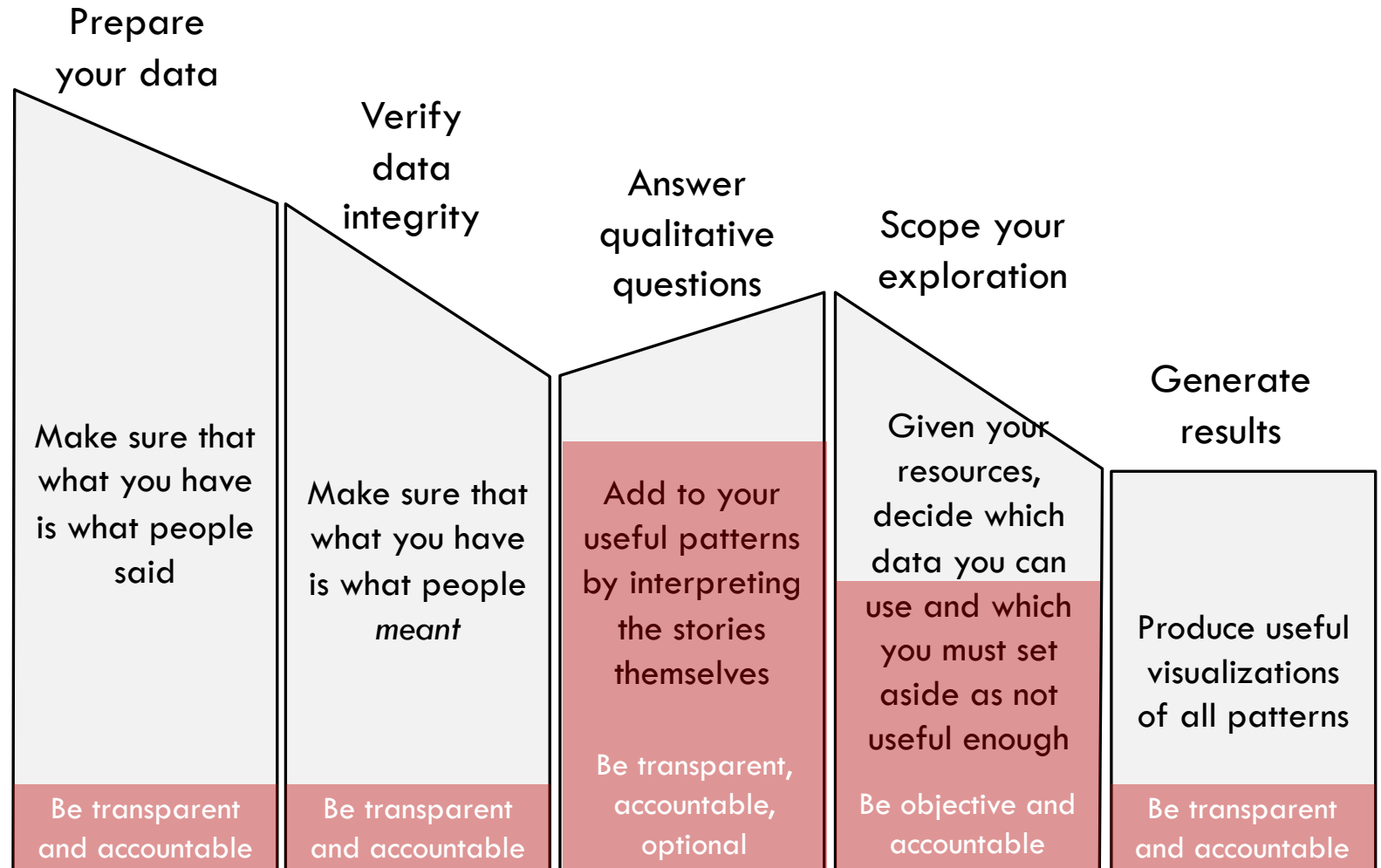
How can I learn to do it?

How can I learn to do it *right*?

PART 1: GENERATING PATTERNS

In the first half of the catalysis process you **enhance** your data (when possible and useful) and **generate** patterns to look at.

In each of these operations (on this page and the next) there is a **potential for bias**. Simple rules help to keep bias to a minimum. (For an explanation of each bias-reducing rule, see two pages ahead.)

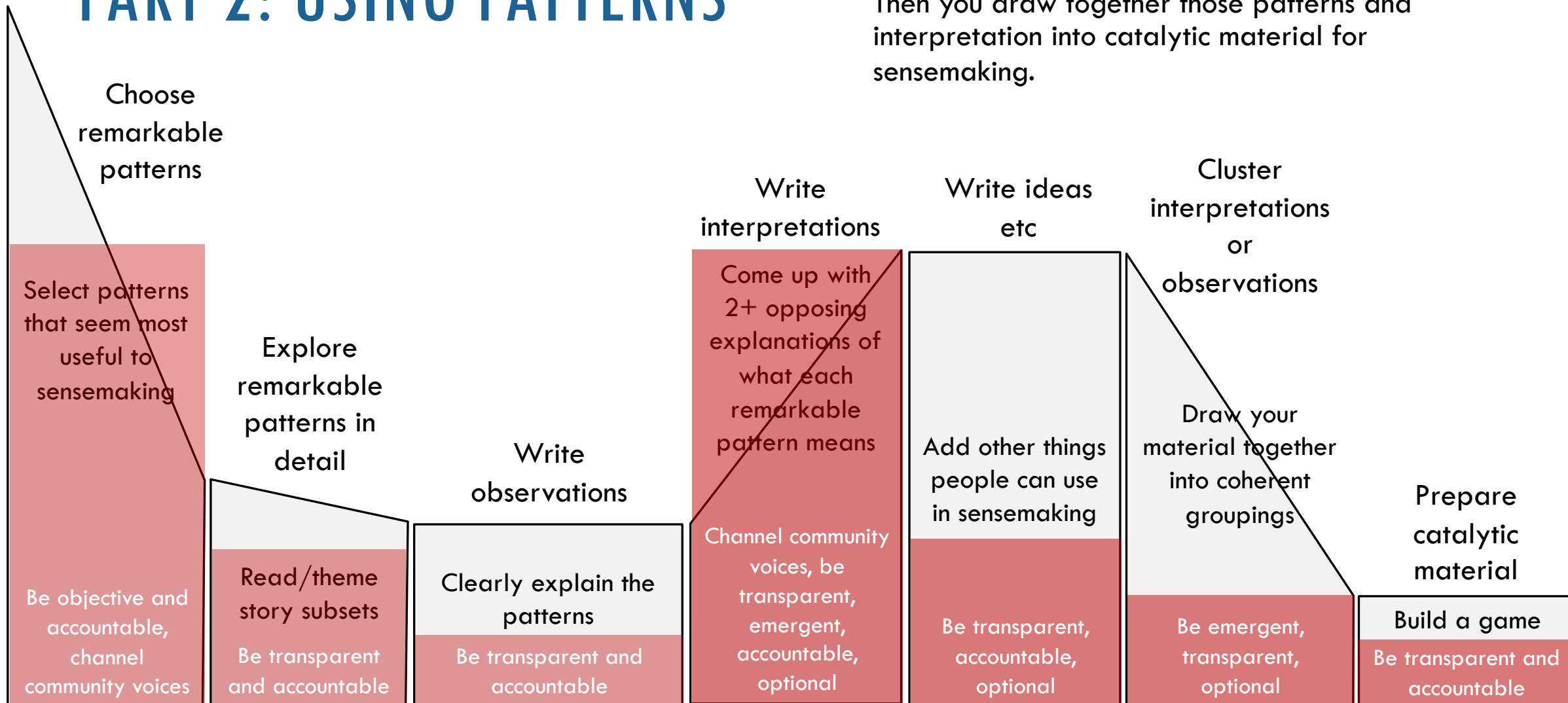


To be continued...

PART 2: USING PATTERNS

In the second half of the catalysis process you choose patterns to **explore, explain, and interpret**. Then you draw together those patterns and interpretation into catalytic material for sensemaking.

After generating results...



BIAS-REDUCING RULES

Be transparent	Explain what you have done and why you did it. Make sure your explanations are clear and comprehensive, but not obtrusive or confusing.
Be accountable	When you add or choose things for your participants, pretend they are watching you . If they would not want you to do that, don't do it. When you use your catalytic materials in sensemaking, explain to your participants that if they don't like any choice you have made, they can challenge it.
Be optional	Explain to your participants that they can disregard anything you have created for them if they think it adds no value or detracts from their sensemaking.
Be objective	Create and follow rules based on objective thresholds ("I will include every correlation with a coefficient over 0.5") and based on what you have learned from reading the stories ("I will include every pattern that seems like it would be of interest to at least one of the people who told a story").
Be emergent	Listen to the stories and to the other data you have collected. Let it tell you what to do. For example, when you cluster your interpretations or observations, you can print them and cut them apart, then let them sit on a table for a day or two, visiting them once every few hours to see how they "want" to move around and form groups.
Channel community voices	Pretend you are your participants . Do what they would do. For example, as you write each interpretation, include at least one verbatim quote from an actual story you collected. If you can't find such a quote, it might mean the interpretation came from you and not from the community.

THE CATALYSIS PROCESS IN DETAIL

I need more details. What do I need to do in each step?

What do I need to learn?

What options do I have?

What should I be aiming for?

What could go wrong, and what should I do then?

PREPARING YOUR DATA

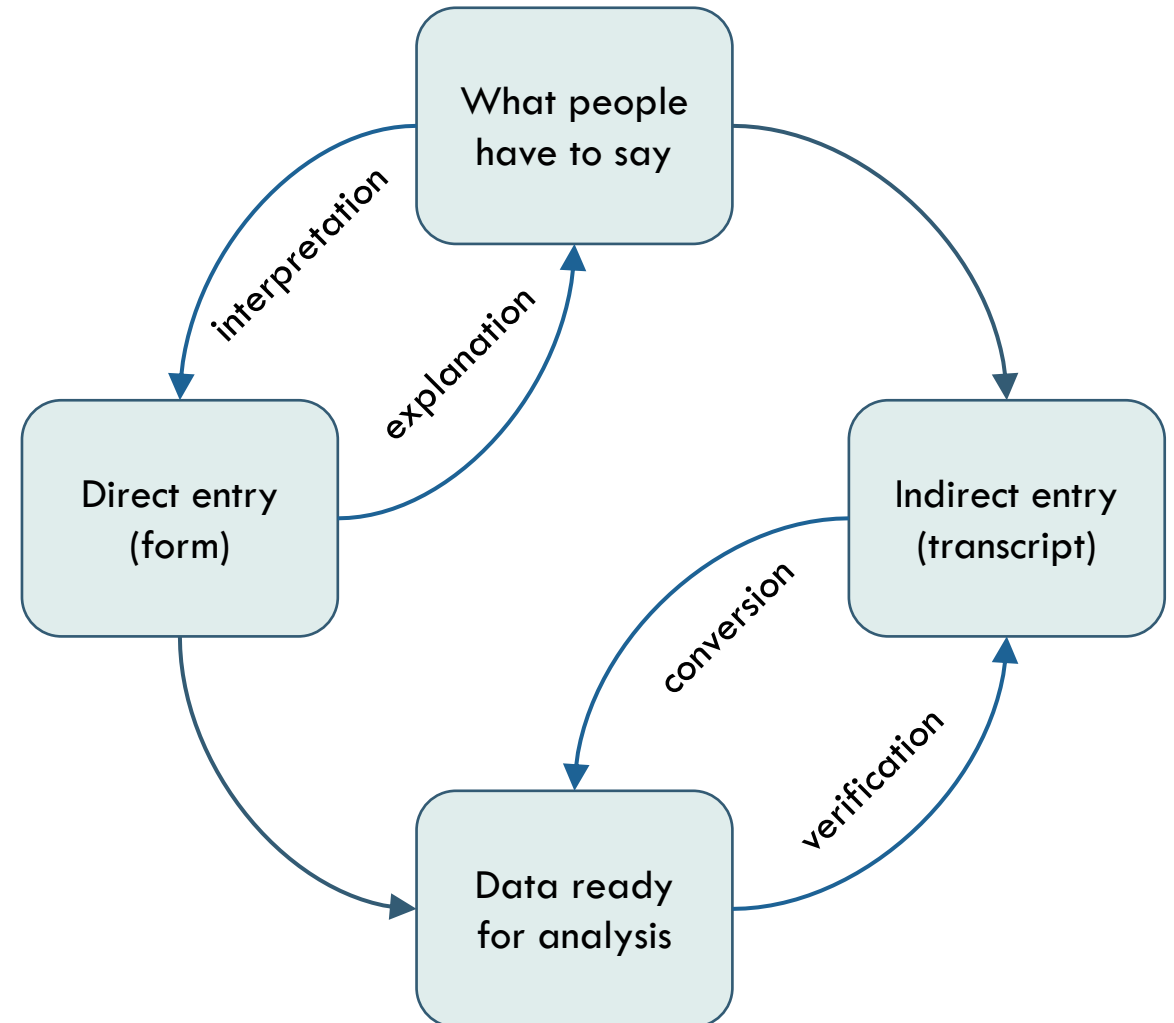
Preparing your data for catalysis means two things:

1. **Converting** it from your collection format to your analysis format
2. **Testing** to make sure that what you are ready to analyze is what people actually said

Direct-entry data (where people tell their stories directly into the system) removes the possibility of conversion errors. But it is less authentic and immediate because people have to work to understand the format you want them to use.

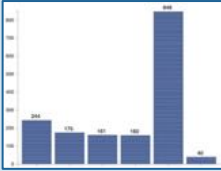
Indirect-entry data (where people tell their stories directly, and you convert what they said to a format that will fit into your system) requires more error checking. But it helps people to speak more freely and simply, without pressure to conform.

Many projects include both entry styles, for example combining real-time conversational interviews or sessions with written web or printed forms.



VERIFYING DATA INTEGRITY (PART 1)

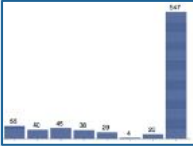
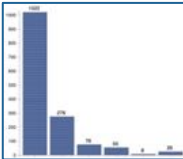
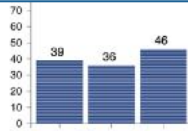
Your data's integrity is how well it represents the intent of your participants. Let's go through some of the most common problems with data integrity and how to resolve them.

The problem	What it could mean	How to find out
One or a few answer counts are very high and all the rest are low 	One answer seemed like a good way to avoid answering the question	Find stories with the high-count answer and compare them with other stories. Does it seem likely that the people who chose that answer didn't want to answer? How many other questions did they answer? Did they tell long stories, or did they seem to say as little as possible?
	The high-count answer was obvious or inevitable	Read some of the stories with the high-count answer. See if the chosen answer might have seemed a foregone conclusion, or if most people might have chosen it for obvious reasons.
	People thought they were required to choose the high-count answer	Find stories with the high-count answer and compare them with other stories. Can you make the case that the people who chose the high-count answer seemed more conformist or hesitant to speak up? Can you find any evidence for the question being leading?
	The low-count answer seemed taboo	Look at the stories with the lowest-count answers. Can you see a unifying thread to them? Do they bring up unpleasant or taboo topics that people might have wanted to avoid?
	The high-count answer combines two similar but not identical answers	Read some of the stories with the high-count answer. Does there seem to be an internal distinction between them?

Note: All of these graphs are from real projects (with identifying information removed).

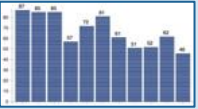
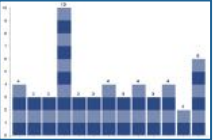
VERIFYING DATA INTEGRITY (PART 2)

More possible data-integrity problems...

The problem	What it could mean	How to find out
<p>Many people did not answer a question</p> 	<p>The question was insulting, confusing, or irrelevant, or there were too many questions, or none of the available answers fit how people were thinking</p>	<p>Read some of the stories without an answer to the question. Can you find a common theme that might tell you why people didn't answer?</p>
<p>The first few answers have much higher counts than the rest</p> 	<p>People got tired of reading (this often happens with long lists of answers)</p>	<p>Pull out two subsets of stories: ones in which only the first few answers were checked, and ones in which answers were checked more evenly. If the first group of stories seems to match its answers less well than the second group, it may mean that some people didn't pay attention to the question.</p>
<p>Similar answers have similar counts</p> 	<p>People couldn't distinguish between two answers and picked one at random</p>	<p>Pull out a subset of stories with each similar answer. See if you can guess from reading each story why people picked one or the other.</p>

VERIFYING DATA INTEGRITY (PART 3)

Yet more possible data-integrity problems...

The problem	What it could mean	How to find out
<p>People checked most of the answers</p> 	<p>The answers were seen as too similar, or people lost patience, or they wanted to say “yes yes all of this”</p>	<p>Pull out two subsets of stories: one in which people checked all or most of the answers, and one in which people checked just one or a few answers. See if you can make the case that the people who checked a lot of answers would have had reasons to do that (other than being exasperated or overwhelmed).</p>
<p>All of the answer counts are small</p> 	<p>Your answer list was too long for the number of stories you planned to collect, or you have few stories, or there was general apathy in answering</p>	<p>You need at least 20 stories in any subset to use it in a statistical comparison. However, such results tend to be weak, and a lower limit of 30 stories per subset is better. Look at your available answers and see if you can lump together any of them to make larger subsets (e.g., “happy” and “satisfied” can be lumped together as “positive”). If you allowed a write-in answer, see if you can find any of those that seem close enough to existing answers to lump them in (e.g., if someone wrote “I like it” you could lump that in to “positive”).</p>

With all of these issues, if your exploration shows you that the pattern comes not from people’s actual interpretations of their stories but from some other source – **conformance, exasperation, confusion, hurt feelings, boredom** – decide whether you should keep the question or drop it. Another option is to keep a problematical question, but treat any patterns derived from it as especially tentative. In that case, explain the problems you found, and explain why you decided to keep the question anyway.

SCOPING YOUR EXPLORATION – HOW MANY PATTERNS?

To begin scoping your catalytic exploration, figure out how many patterns you can **generate**, how many you **need**, and how many you can **handle**.

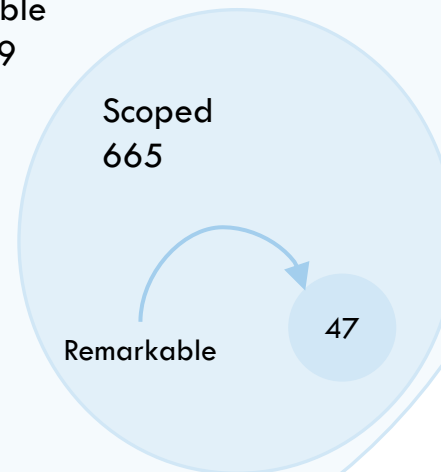
The number of patterns you can **generate** depends on the number and types of questions you asked.

To support sensemaking well, you will **need** at least 20 remarkable (strong, surprising, and useful) patterns. How many patterns you must generate to *get* to those 20 remarkable patterns depends on how your story collection went.

- If your patterns are weak or muddled, maybe only one in twenty will be remarkable.
- If your patterns are strong and meaningful, your remarkable ratio might be as high as one in five.

It's impossible to guess how well your story collection will go in advance. So it's better to have too many questions – and too many patterns – than too few. However, you might end up with more patterns than you can handle.

Available
1439



The number of patterns you can **handle** depends on a lot of things:

- how strong your patterns are (strong patterns are easier to interpret)
- how many stories you have (more stories means stronger patterns)
- how much time you have
- how many times you have done this before
- what software you are using

Most people in most situations can handle several hundred patterns. Above that, things get harder.

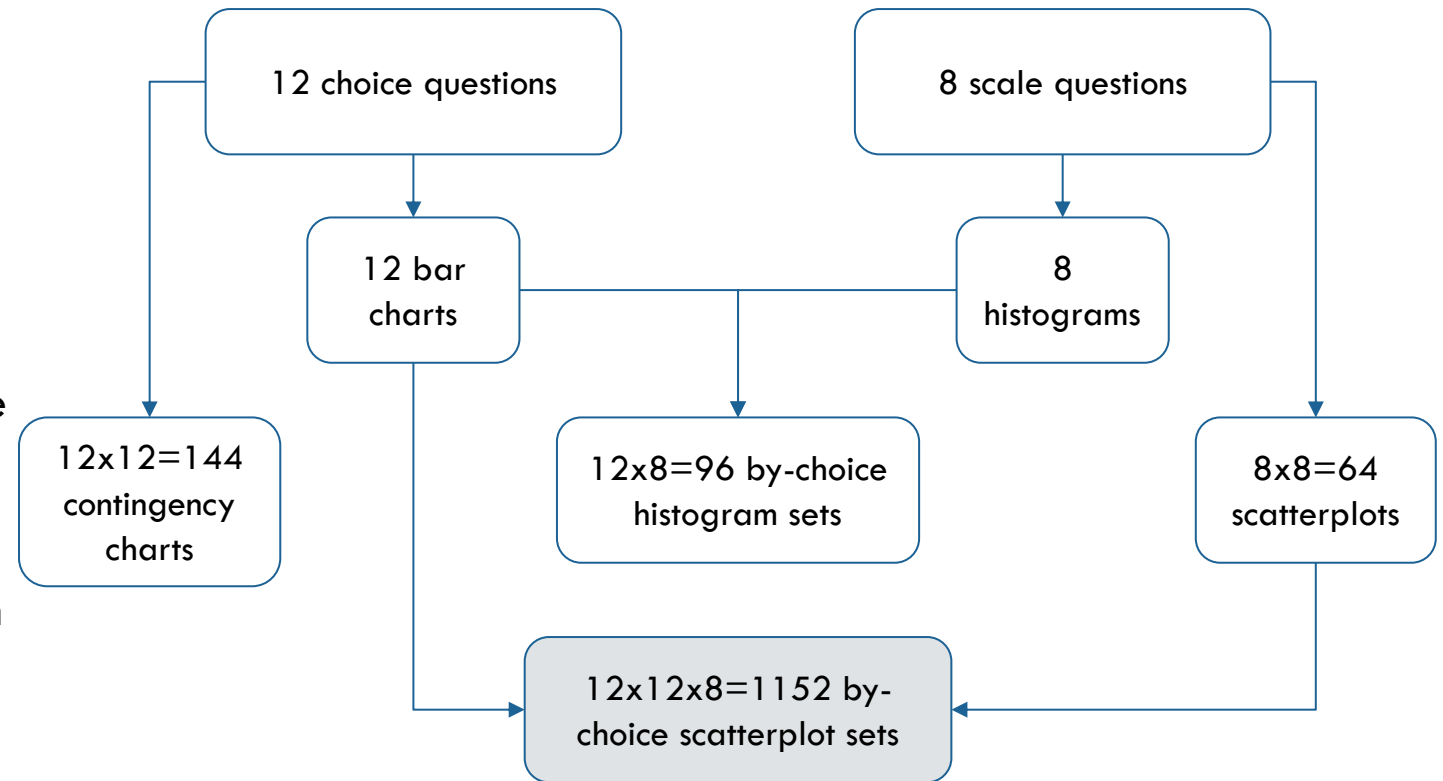
If you have too many patterns to start with, there are **four ways to reduce the number** of patterns without introducing bias.

SCOPING YOUR EXPLORATION – DEPTH

The simplest pattern-reducing method is to lower your **depth level**. You can leave out entire categories of patterns.

In this fictional scenario, based on the number and types of questions I asked, I could generate 1476 patterns. However, ignoring by-choice scatterplot sets would reduce the number to 324.

It *might* be useful to look at those graphs. I wouldn't rule them out until I spent a little time spot-checking them. But say I take a quick look at a random sample (of, say, 20) and find nothing interesting. In that case I can probably let that group of patterns go – with the mental note that I might want to check on some of them later when I am exploring particular patterns.



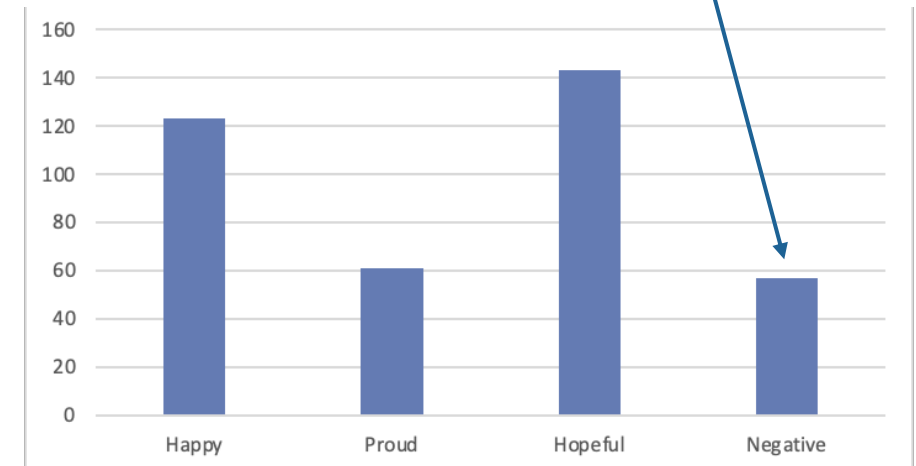
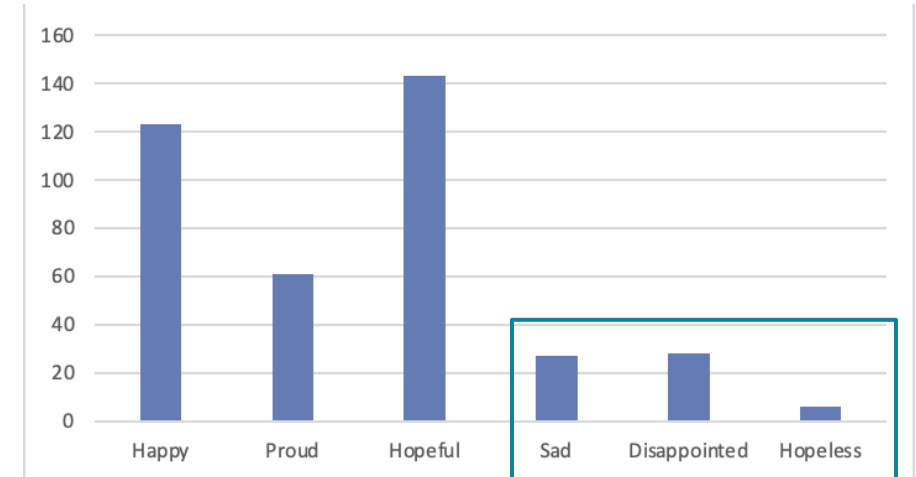
SCOPING YOUR EXPLORATION — LUMPING

Another way to reduce your pattern numbers is by building a good **lumping scheme**.

When you ask people choice questions (like “How do you feel about this story?”), your lists of available answers should be long enough to anticipate most of their likely responses.

However, when it comes to catalysis, **every answer count creates another set of patterns**. Also, since you can't use small subsets in statistical tests, lumping together similar answers can improve your ability to find useful patterns.

Spending some time at the start of catalysis looking for answers you can lump together without losing essential meaning can help you reduce your workload *and* strengthen your patterns.



SCOPING YOUR EXPLORATION – THRESHOLDS

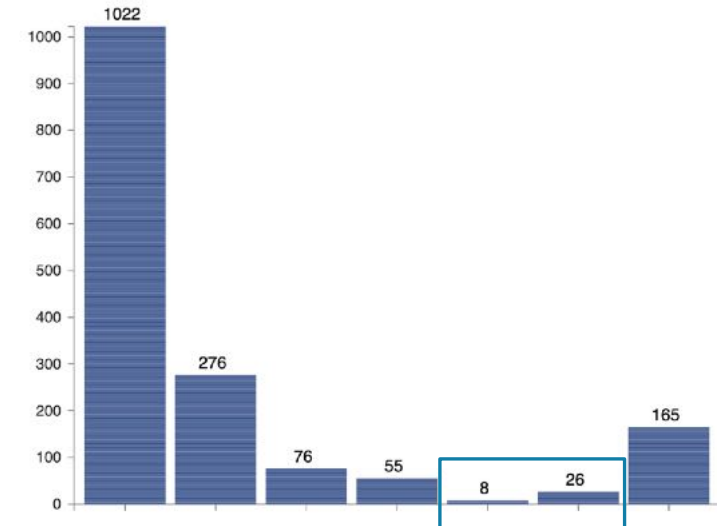
Another way to reduce your pattern count is to set **numerical or categorical thresholds**. For example, you might decide to consider only:

- Stories that recount events (excluding opinions)
- Subsets with 30+ stories (trends will be weaker in smaller subsets)
- Question combinations that include at least one question about stories (because they are more likely to address the topic)
- A different statistical test threshold than the usual $p < 0.05$
- The 10 questions with the greatest range of variation (because they are more likely to contribute to useful patterns)
- The 10 questions with the most responses
- The 10 questions a panel of participants chose as most relevant

All of these choices exclude patterns, but they exclude them uniformly and without bias. Objective thresholds can reduce the number of patterns you need to review considerably.

But be transparent and accountable! **Build a case for each threshold**, and explain it in your catalytic materials.

Significance ▼
$p < 0.001$ U=172.5 n=80
$p < 0.001$ U=186.5 n=81
$p = 0.004$ U=216.5 n=81
$p = 0.007$ U=115.5 n=81
$p = 0.018$ U=250 n=81
$p = 0.026$ U=127.5 n=81
$p = 0.028$ U=136.5 n=81
$p = 0.068$ U=152.5 n=61
$p = 0.158$ U=162.5 n=81



These answers could not be lumped, so they can be ignored, reducing the number of patterns

Which significance value should we use as a cutoff?
0.05? 0.02? 0.01? 0.005?

SCOPING YOUR EXPLORATION — HELP

Finally, you can reduce your catalysis load by **getting some help**.

You might be able to get other people to **share the work** of catalysis so you can include more patterns. Many hands make light work! (See “Facilitating group interpretation” below.)

Also, other people can **help you decide** how to trim the number of patterns you will consider. If you can talk to some of your project participants, **show them your scoping plan** and ask for their feedback. They can help you ground your decisions in participatory interaction.



ANNOTATING STORIES

There are three reasons to annotate stories in answer to your own questions.

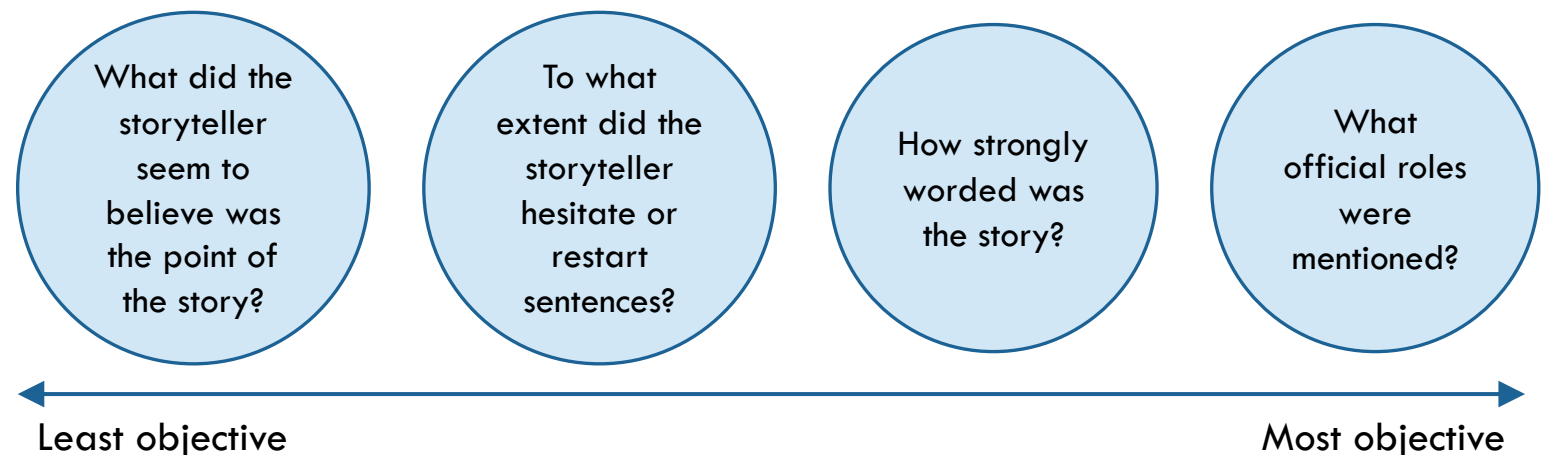
During your story gathering, you couldn't ask very many questions, so you don't have many patterns.

Your participants didn't answer your questions, or they answered in muddled ways. So you don't have very many *useful* patterns.

As you read your stories, you can see differences among stories that seem like they might create *more useful* patterns.

To avoid inserting bias, **all annotation questions should be objective**. That is, anyone should be able to understand and agree with your answers.

Having said that, some questions are more objective than others. You can include questions that involve some interpretation *as long as you make it clear that all patterns based on those questions are tentative* and that participants can ignore them if they don't like them.



THEMING STORIES

Story theming is a subset of annotation in which answers to the question “**What is going on in this story?**” emerge as you read the stories.

This is an interpretive annotation, so it must be put forth tentatively and optionally. Still, theming can provide useful insights when juxtaposed with answers provided by participants.

On small projects (with 100-200 stories), you can theme all of your stories. On larger projects it is more efficient to theme **subsets** of stories while you are exploring particular patterns.

Pass one: Write themes for each story

Describe each story very briefly and in a generic way

Examples: We never give up; They can't be trusted; We take care of each other

Give each story 1-3 themes

Every time you can reuse a theme, do so

Pass two: Clean up your themes

Merge similar themes

Split up themes that have too many stories

Remove themes that have too few stories

Reduce your list to 5-10 themes

Pass three: Check your theme assignments

Read back over the themes for each story

Find a quote within each story that supports each theme assignment

If you can't find a supporting quote, drop the assignment

GENERATING PATTERNS – FIRST LEVEL

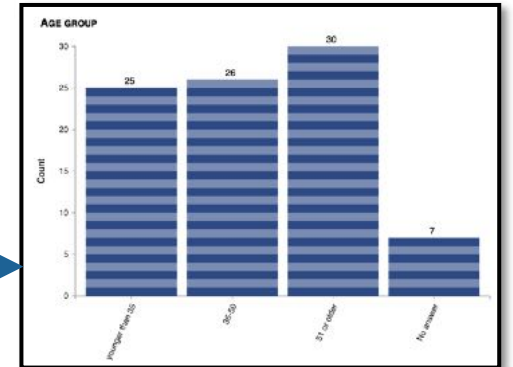
To make participation **available, inviting, and respectful** to every human being, PNI relies on two simple question types that are easily understood by everyone.

Choice questions like “**Was the fish yellow or blue?**” present participants with lists of potential answers. From these we can generate **bar graphs**, which show answer counts. We can also convert free-text questions into bar graphs by grouping answers into descriptive categories.

One-question bar graphs do not have statistical test values.

What is your age group?


- younger than 35
- 35-50
- 51 or older



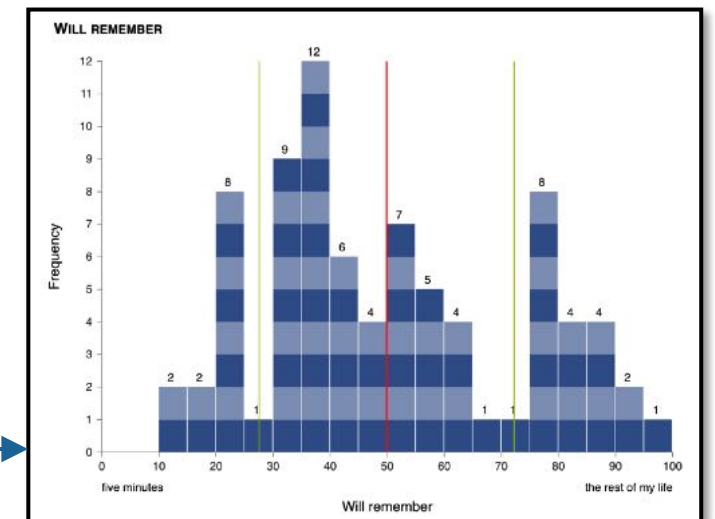
Scale questions like “**How big was the fish?**” invite participants to choose a value along a numerical scale – either verbally (by saying a number) or physically (by moving an object or a part of their body). From these we can generate **histograms**, which show distributions of frequencies (answer counts) within each range of values.

*Descriptive statistical test values for a frequency distribution include its **mean** (average), **standard deviation** (how spread-out it is), **median** (its middle-most value when sorted), **mode** (its most common value), **skewness** (its left or right shift), and **kurtosis** (its up-or-down peaking or flattening).*

How long will you remember this story?

← five minutes  the rest of my life →

Does not apply

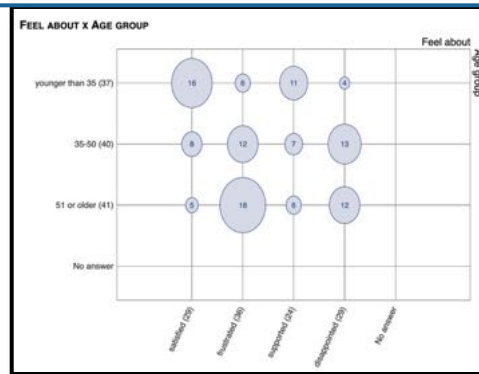


GENERATING PATTERNS – SECOND LEVEL

After you have generated the patterns for your first, simplest level (bar graphs and histograms), it is time to move up to the second level, where you look at **two questions together**. There are three possible combinations of the two basic question types.

Choice x choice combinations create **contingency charts** (or tables), which show counts of co-occurring answers.

*A **Chi-squared test value** tells you whether the two answer distributions are independent.*

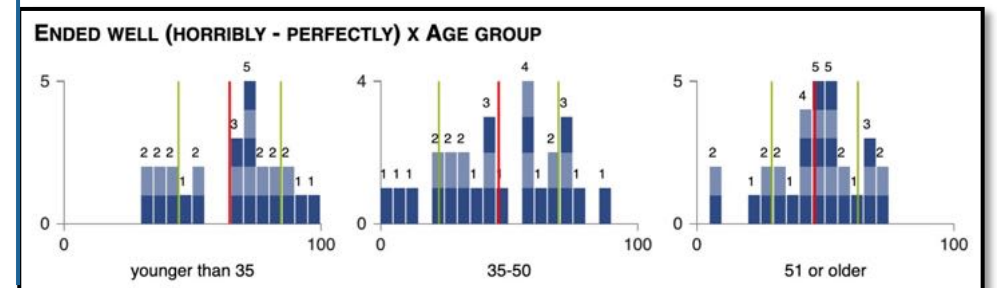
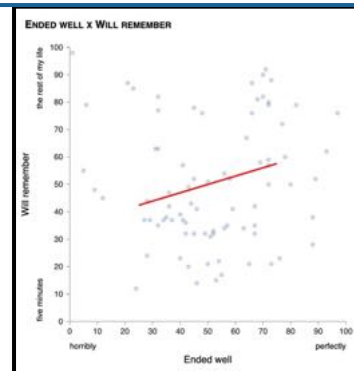


Choice x scale combinations create **histogram sets**, which show distributions for subsets of values for the scale question associated with each answer to the choice question. (These can also be drawn as multi-variable bar graphs.)

*A **difference value** (between means or groups) tells you whether the distributions are significantly different.*

Scale x scale combinations create **scatterplots**, which show values on both scales at the same time.

*A **correlation coefficient** tells you whether the two answer distributions are independent.*

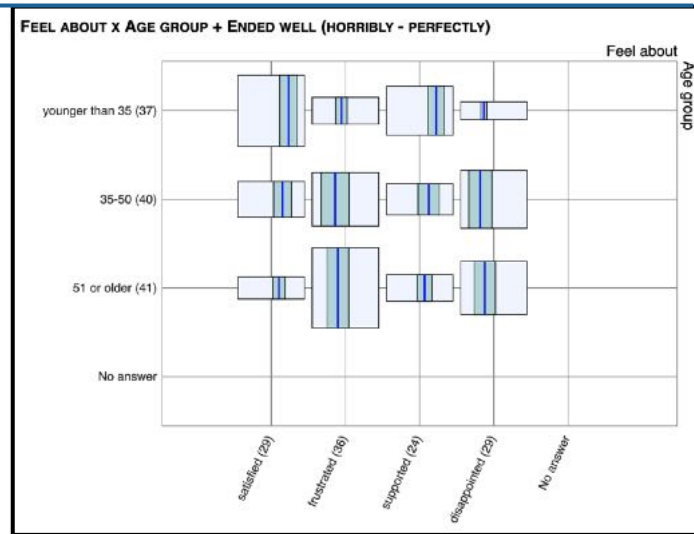


GENERATING PATTERNS – THIRD LEVEL

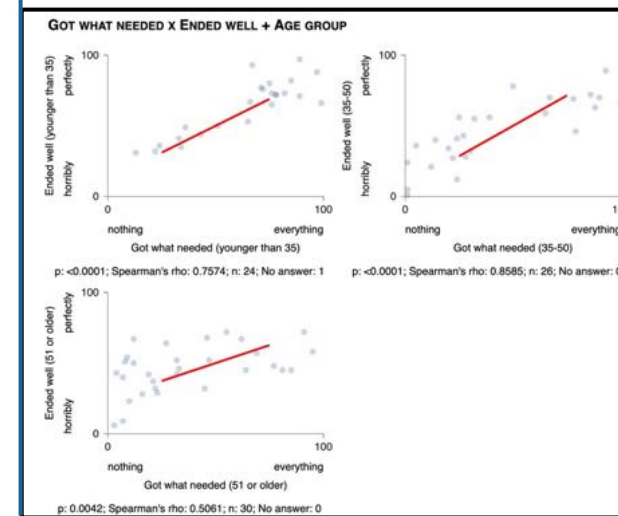
Finally, you can look at **three questions together**. Depending on how many questions you asked, how many stories you gathered, and how much time you have for catalysis, you may not want to (or be able to) get to this level of detail. However, it can be useful when you find few or weak patterns at the first and second levels.

Choice x choice x scale combinations create **histogram charts** (or tables). These show frequency distributions of scale values for each pair of choices. (This chart shows only the means and standard deviations of the distributions.)

Statistics at the third level are generally the same as for the second level.

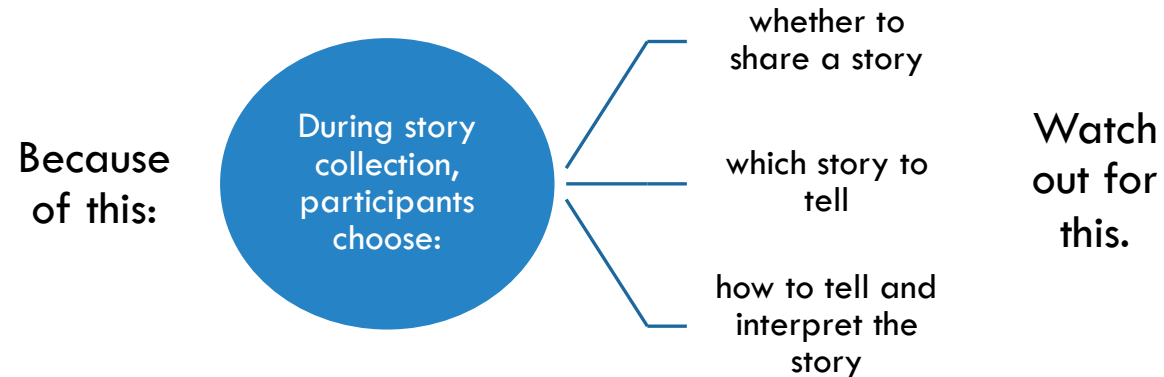


Scale x scale x choice combinations create **scatterplot sets**, which show separate by-choice distributions of values for each “scale x scale” combination. (These can also be drawn as multi-variable scatter plots.)



A SPECIAL WARNING ABOUT STATISTICS IN PNI

Statistical test results in PNI must always be treated like **houses built on sand**. The foundation of the PNI data collection process is too weak to support conclusive (rather than suggestive) results.



As long as you **respect this limitation**, you can get a lot out of using statistical tests in PNI. They can help you choose patterns to highlight, and they can help you explain those patterns. But your statistical results, *no matter how significant their values*, are vulnerable to legitimate challenge *because of the way the data was collected*.

Is this a problem? No, because the purpose of catalysis is not to provide proof. It is to support sensemaking. What really matters in PNI is **the meaning created by your participants** as they make sense of the patterns and interpretations you prepare for their use.

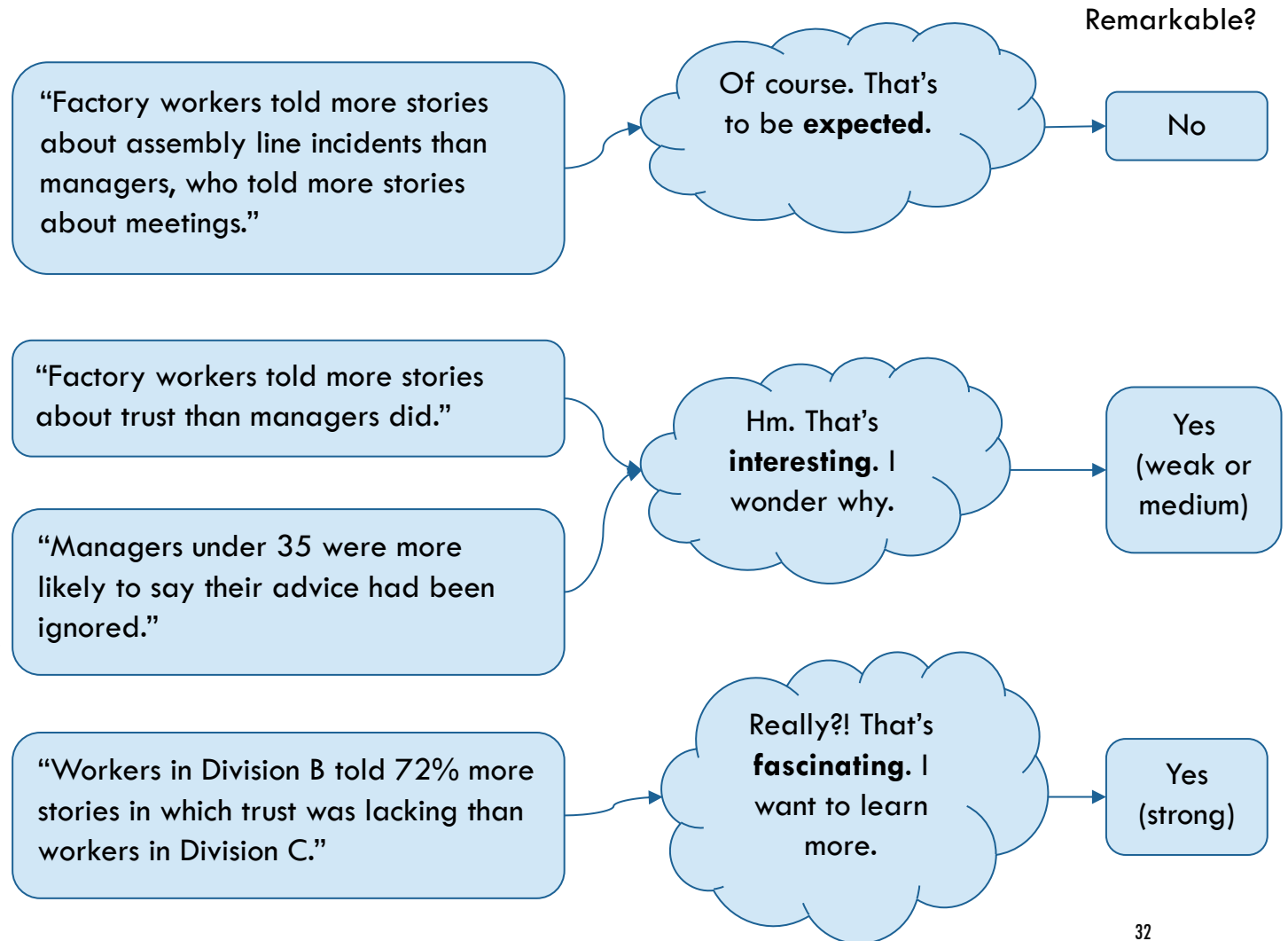
CHOOSING REMARKABLE PATTERNS

Remarkable patterns are

- **strong** and clear
- **surprising**, not obvious
- **relevant** to the goals of the project

How can you decide whether a pattern is remarkable? Describe it to yourself, in writing or aloud. Then **pay attention to the next thought that comes to mind**. Do you want to know more? Use your curiosity – or lack thereof – as an indicator of possible utility.

If you aren't certain that you know your participants well enough to choose remarkable patterns for them, check. Pull out a random sample of 10-20 patterns. Choose some remarkable patterns among them. Then **ask some of your participants** to choose remarkable patterns as well, *without showing them your choices*. Then compare your choices to theirs. If they are very different, ask more questions.



HELP! ALL OF MY PATTERNS ARE WEAK!

Yes. This can happen. Even if you have done everything right, it can still happen. There are many possible reasons.

- People weren't ready to open up about the topic
- People were afraid to speak up
- People didn't trust you (or your role, or someone you were working with)
- The timing wasn't right
- People were busy or preoccupied
- People were confused by your questions, your word choices, or the whole experience
- People thought the idea of sharing stories was stupid, worthless, or disrespectful
- The topic is more private or sensitive than you thought it was
- People didn't know as much as you thought they would about the topic
- People didn't care as much as you thought they would about the topic

If this happens, you have a few options.

Gather more stories

- More stories means more answers, and more answers might make weak patterns stronger

Ask more questions

- See if you can ask some of the people who told the stories a few more questions about them
- See if you can gather a second group of people, show them the stories, and ask them some questions about them

Answer questions yourself

- If you see patterns in your story texts, try answering some annotation questions and see what that brings to the surface

If none of these things work, you still have **two more options**.

You could consider your current story collection a pilot and **reboot your project** with new and better questions, perhaps after going through a new planning exercise to refocus your efforts.

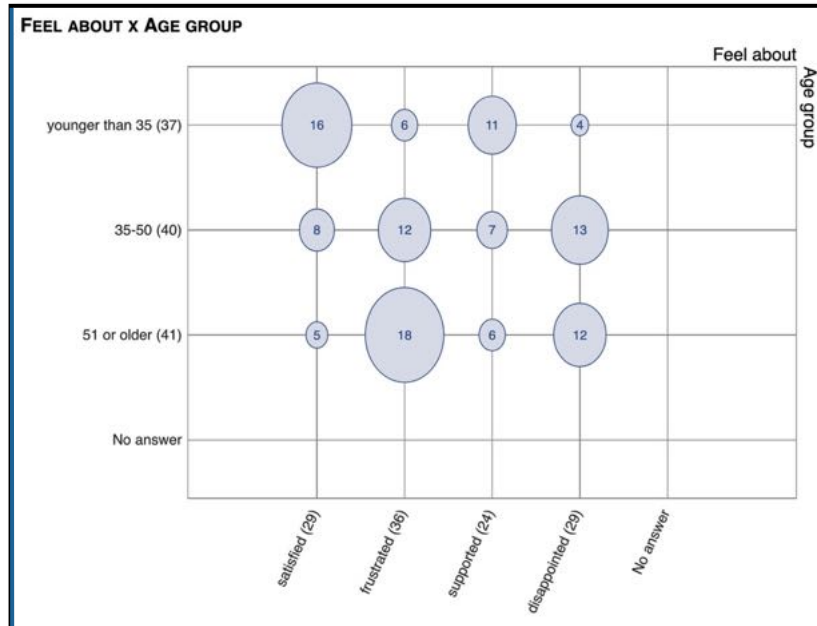
Finally, you can have your participants work directly with your stories, without using catalytic material. **Catalysis is not a required part of PNI.** It is almost always helpful, but you can do a meaningful and useful PNI project without any catalytic material at all.

WRITING OBSERVATIONS

Now that you have selected some remarkable patterns, it is time to explain what you found. This is the easiest part of catalysis. **Just state the obvious.** Describe each pattern briefly and clearly. Include no statements that a reasonable person cannot see, understand, and **agree with.**

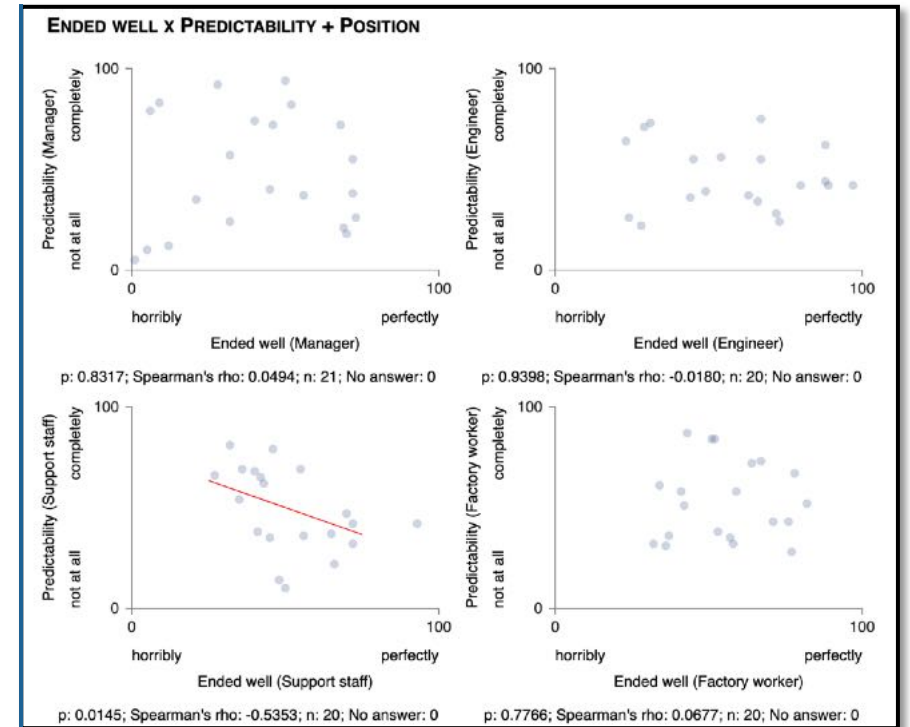
Also, give each observation a **relative strength.** This will help your participants (and you) to decide how much time and attention to give to it.

Aim to write **at least ten strong observations.** Don't worry about setting perfect strength values right away; you can change them later.



Younger people more often said they felt satisfied or supported when they thought about their stories. Older people more often said they felt frustrated or disappointed.

WEAK Small numbers. Also note that this pattern has no statistical result because the “Feel about” answers were not mutually exclusive.



The questions “How well did this story end?” and “How predictable were the events in this story?” were correlated (stories with more predictable events ended worse) for support staff, but not for managers, engineers, or factory workers.

MEDIUM These numbers are small, but the difference is strong, so it may be worth exploring.

EXPLORING REMARKABLE PATTERNS IN MORE DETAIL



In this image, what similarities and differences do you see in the sets of bricks above and below the center line?

Once you have written some basic observations, if you have time, you can delve more deeply into some or all of them. To do this, **sit with the stories** in each pattern and see what they can tell you.

Choose 2-3 **subsets** of stories that differ based on answers to questions in the pattern. Then read the stories, looking for:

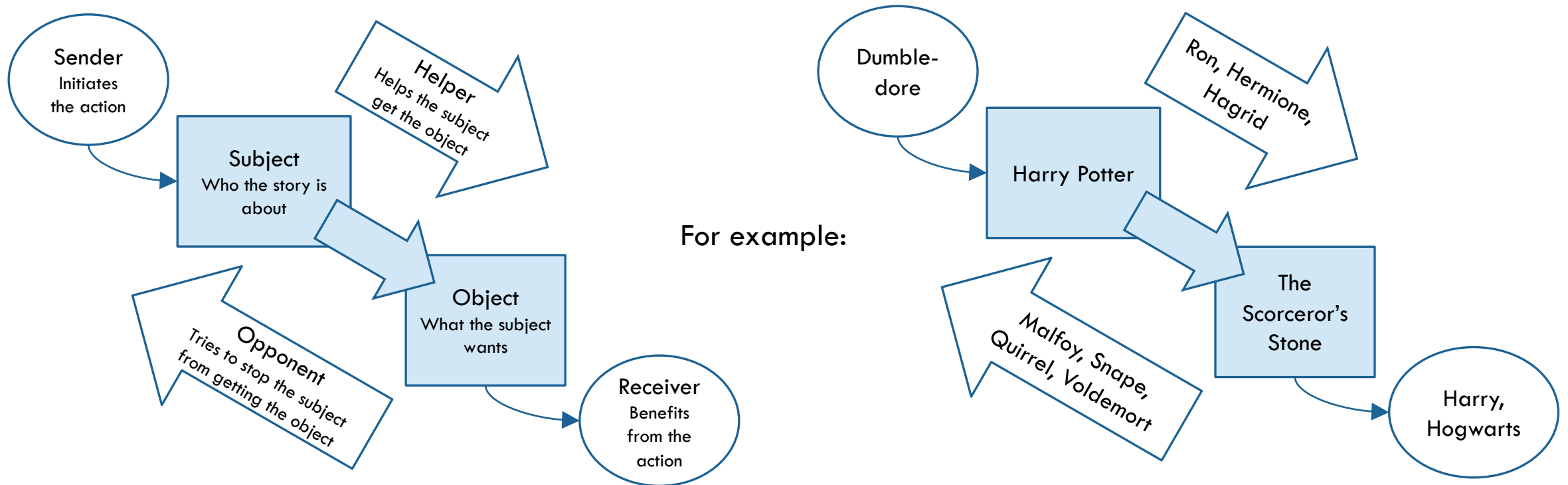
- Differences in **themes** (using themes you marked on all the stories at the start, or using a special set of themes you mark right now on just these stories)
- **Common** words or phrases, or **juxtapositions** (e.g., in one group of stories people keep saying “our town” while in the other they keep saying “the town”)
- Story **aspects** based on narratology frameworks (e.g., Greimas’ actantial model)
- Any other **similarities or differences** that “jump out” as you read the stories

Why do this? Because:

- You might find an **even more interesting pattern** by considering the texts of the stories in a pattern.
- If your patterns are weak, sitting with stories can help you find **stronger patterns**.
- If you have too many patterns to use, sitting with stories can help you **choose patterns** to work with.

WAIT, WHAT IS GREIMAS' ACTANTIAL MODEL?

Glad you asked. It is one of my favorite story-structure analysis systems.



There are lots of **frameworks for picking apart stories**. You might have your own favorites already. All of these tools are useful in catalysis *as long as you share them* with your participants. Explain what you are doing and why, and help your participants use the same tools in their sensemaking.

WRITING INTERPRETATIONS

Writing interpretations is **the hardest part of catalysis**. It requires a good imagination and the ability to step outside your own point of view. But with practice, anyone can learn to do it well. Here's how.



1. Read each observation to yourself, either silently or out loud. Then write down **what you think it means** in relation to the topic of the project. Not what it *is*: what it *means* – its causes and implications.
2. Now **disagree with what you wrote** in as many ways as you can. Argue with yourself. Cross your arms, scowl, and listen to the nay-saying part of you. Write down each alternative interpretation that comes to mind.
3. If you can't think of any alternative interpretations, or if you aren't sure that what you came up with will be useful:
 - Read some of the stories you collected, either those connected to the pattern or a random sample. **What would the people who told the stories say** about the observation?
 - If that doesn't help, think of a person with whom you have often disagreed. What would they say?
 - If that doesn't help, think of a fictional character who relates in some way to your topic. What would they say?
4. Now **find at least one verbatim quote from a story** that supports each interpretation. That's your test. If you can't represent an interpretation with a verbatim quote, leave it out.
5. Finally, **randomize the order** of your interpretations so that your own opinion is impossible to find.

INTERPRETATIONS AND YOUR BACKGROUND



If you are an **analytical** sort of person, you might need to work extra hard to come up with alternative interpretations.



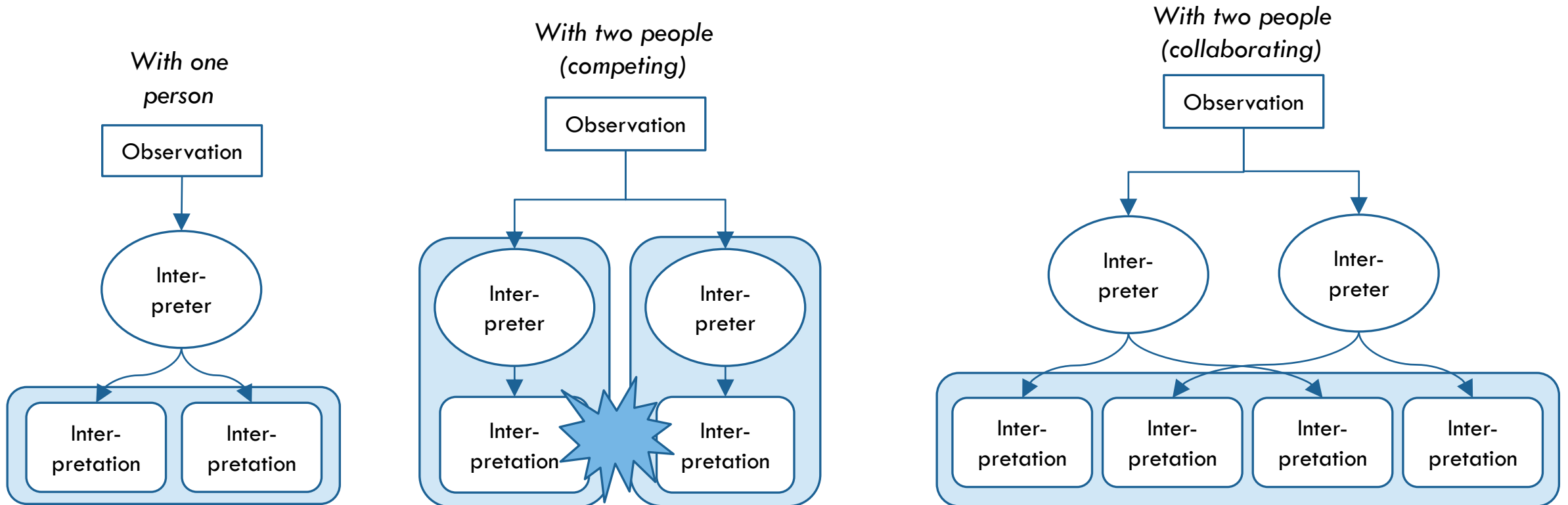
If you are a **creative** sort of person, you might need to work extra hard to avoid writing interpretations that are interesting and clever but not useful.

The verbatim-quote rule helps with either (or both) of these issues because:

- Quotes check for **bias**. If you can't find a quote to support an interpretation, it might be coming from you, not the project.
- Quotes check the **remarkability** of your patterns. If you can't find more than one interpretation for an observation, maybe the pattern is too obvious to be remarkable. If there is nothing to talk about, the pattern won't be useful in sensemaking.
- Quotes give your participants the **information** they need to explore the pattern for themselves. If all of your interpretations include quotes, people won't have to take your word for it; they can use what you found.

FACILITATING GROUP INTERPRETATION

When it comes to writing interpretations, two minds are better than one, and three minds are better than two. But be careful! **Each person must write at least two opposing interpretations** for each observation. Otherwise each of you will promote and defend your own interpretations, and a battle will result.

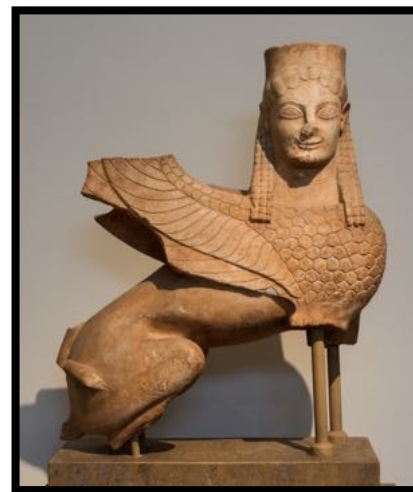


WRITING IDEAS AND OTHER EXTRAS

After you have finished writing your interpretations, you might want to add a few extras that will give your participants even **more food for thought** and discussion.



Ideas: things the community or organization could do to resolve the problem or take advantage of the opportunity described in the interpretation.



Questions: Open-ended yet provocative questions participants can use to discuss and explore the interpretation together.

Extras such as these are especially useful in projects that surface few or weak patterns.

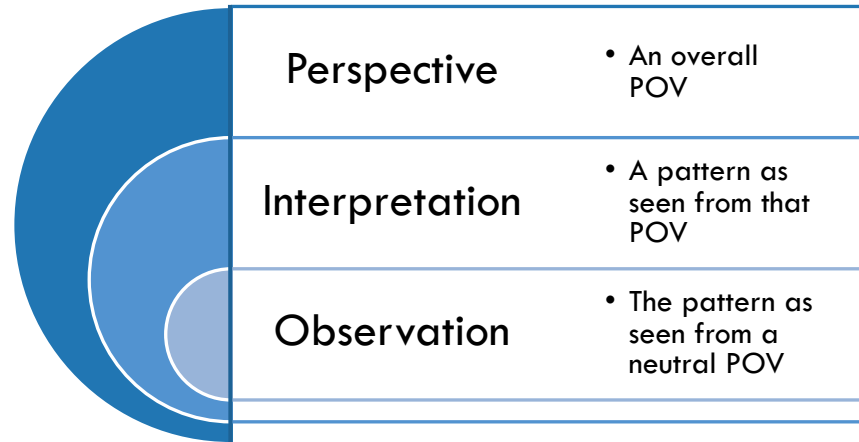
However! When there is a great distance between you and your participants, or when your participants are very sensitive or defensive about your topic, **extras can be less than helpful**. If you are in doubt, **use verbatim quotes** to test and support what you write. If you can't find a quote that connects in some way to each idea or question, drop it. And if this happens a lot, you may need to rethink your plan.

CLUSTERING CATALYTIC MATERIAL

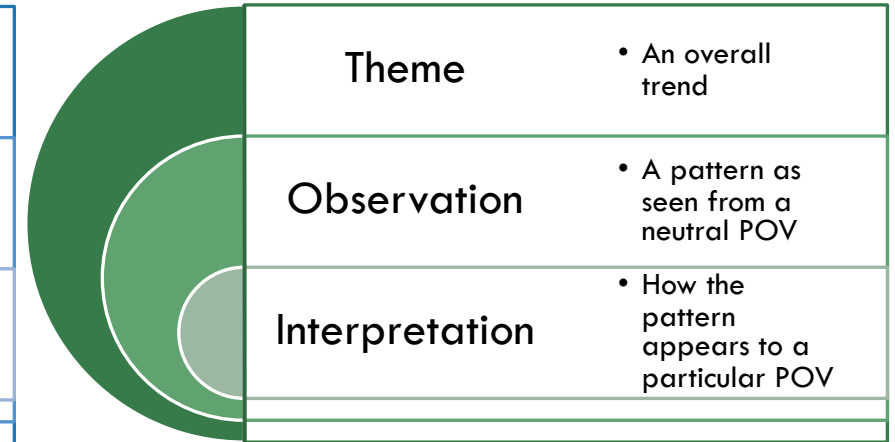
Clustering your observations or interpretations gives your participants a way to **zoom in and out** on your catalytic material. It makes the details of what you found available but not overwhelming.

Move your observations or interpretations around in space, either on a computer screen or on a physical surface (as sticky notes or printed pieces of paper). Place like with like. Keep clustering until you have 5-10 groups.

Give your clusters names that will have meaning and relevance to your participants. Use the cluster names to organize your catalytic materials.



Clustering **interpretations** is useful when people are **ready to break down assumptions and think differently** about your topic. Bringing multiple perspectives to the forefront can energize the discussion – but only if people are ready for it. This approach can also be useful when people are wary (or weary) of fact-based or analytical approaches to the topic.



Clustering **observations** is useful when people are **reluctant to explore multiple perspectives** and would prefer a fact-based discussion. With this approach, they will still encounter multiple interpretations, but they will see them *after* a fact-based description of each observation, making the interpretations easier (and safer) to explore in context.

GETTING READY FOR SENSEMAKING: FORMAT

Now that you have finished building your catalytic material, it's time to prepare it to help your participants make sense of your topic. How you should do that depends on your answers to several questions.

At this extreme, you must **translate your materials** into a format your participants will be able (and willing!) to use. For example, you could prepare:

- Spoken **presentations** in which you illustrate each pattern by retelling selected stories, then ask participants to discuss what they heard
- Poster-sized **infographics** you put up around the room and ask groups of people to visit and discuss
- Magazine-like **handouts** complete with clear instructions for use

At this extreme, time and attention will be limited, so you can't just dump *everything* you have on people. **Choose a selection to highlight** and make the rest of the materials available but not required.

Can your participants read? Can they read graphs? Statistics?

Or do you need to adapt your materials to suit your participants?

Is your topic ambitious and complex, with many layers to explore?

Or is it simple and straightforward?

Are your participants eager to explore your topic?

Or are they frightened, intimidated, defensive, or bored?

Are you experienced at helping people confront difficult issues?

Or have you never done this before?

At this extreme, you can use your materials **just as you created them**. They should be attractive and inviting, but they don't need to be translated or abridged.

GETTING READY FOR SENSEMAKING: TONE

However you present your catalytic material, your tone should be one of **respectful support**. Invite and inspire your participants to make sense of your topic together.

Before you use your materials in a workshop, **test them** to see if they work the way you want them to. Put them in front of a few people **without a word of explanation** and watch what they say and do.

As you use your materials in sensemaking, watch people use them, and work to refine them.

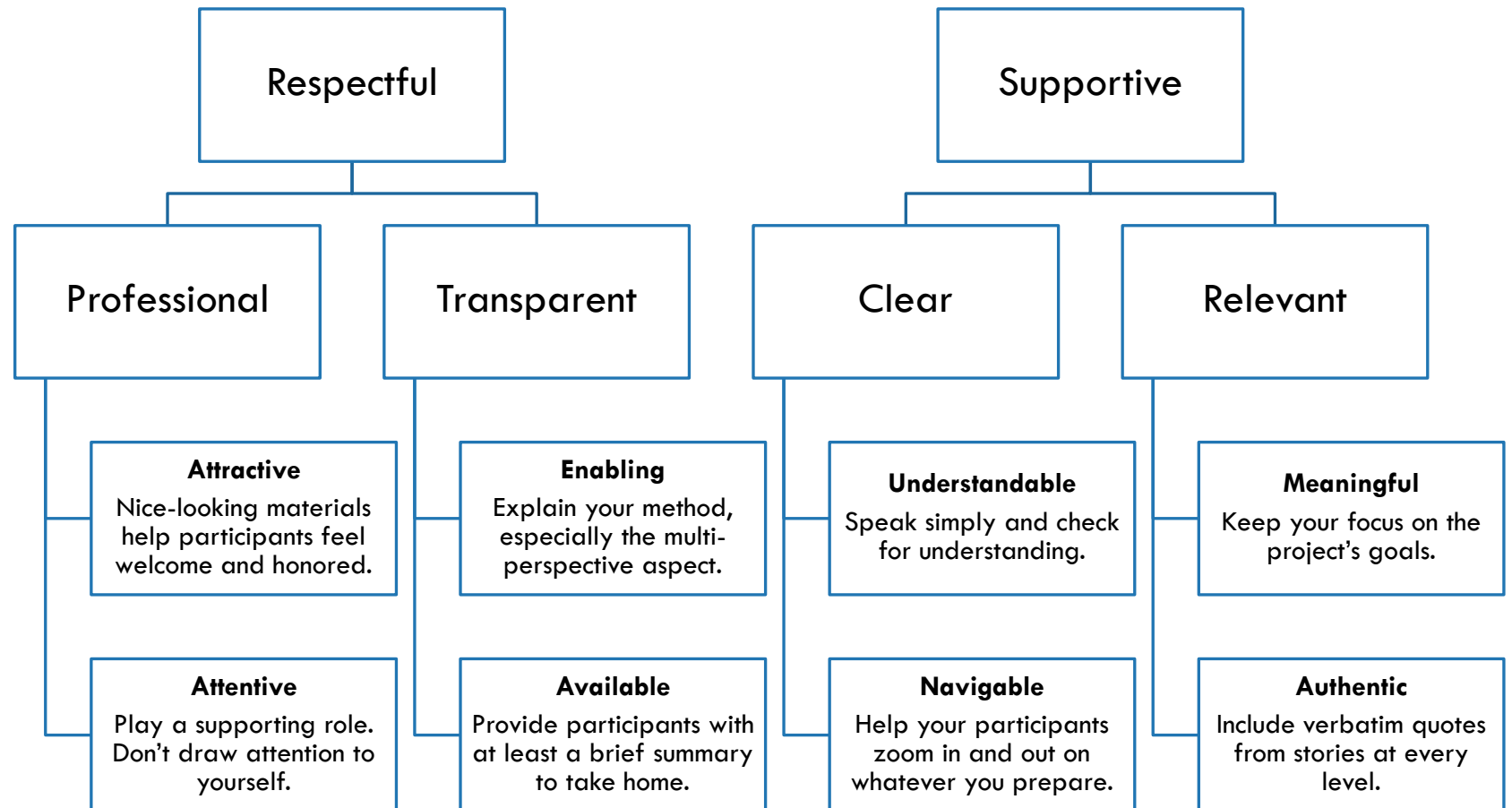


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Workshop [https://commons.wikimedia.org/wiki/File:Workshop_in_DE_Studio_in_Antwerp,_22_September_2016_\(2\).jpg](https://commons.wikimedia.org/wiki/File:Workshop_in_DE_Studio_in_Antwerp,_22_September_2016_(2).jpg)

Gingerbread man [https://en.wikipedia.org/wiki/File:What_happened_then_stories_\(1918\)_14750511904.jpg](https://en.wikipedia.org/wiki/File:What_happened_then_stories_(1918)_14750511904.jpg)

Plant with roots [https://commons.wikimedia.org/wiki/File:Luigi_Balugani_-_](https://commons.wikimedia.org/wiki/File:Luigi_Balugani_-_Commiphora_gileadensis_(L.)_C_Christian_Balm_of_Gilead,_Opobalsam,_finished_drawing_of_tree's_habit_(with_roots)_-B1977.14.8904_-_Yale_Center_for_British_Art.jpg)

[Commiphora gileadensis \(L.\) C Chr \(Balm of Gilead, Opobalsam\), finished drawing of tree's habit \(with roots\) - B1977.14.8904 - Yale Center for British Art.jpg](https://commons.wikimedia.org/wiki/File:Luigi_Balugani_-_Commiphora_gileadensis_(L.)_C_Christian_Balm_of_Gilead,_Opobalsam,_finished_drawing_of_tree's_habit_(with_roots)_-B1977.14.8904_-_Yale_Center_for_British_Art.jpg)

Ancient tablet https://commons.wikimedia.org/wiki/File:Funerary_Tablet_of_Horpaq,_priest_at_Hermopolis_and_son_of_Djehutyhor_MET_DP166857.jpg

Ancient game https://commons.wikimedia.org/wiki/File:Gaming_pieces_MET_DP160290.jpg

People collaborating <https://commons.wikimedia.org/wiki/File:Kahana-collaboration.png>

Houses on sand [https://commons.wikimedia.org/wiki/File:A_Changed_Coastline_in_Jersey_\(8150910119\).jpg](https://commons.wikimedia.org/wiki/File:A_Changed_Coastline_in_Jersey_(8150910119).jpg)

Brick wall https://commons.wikimedia.org/wiki/File:Brick_wall_texture_image.jpg

Mutual accusation <https://www.flickr.com/photos/nlmhmd/52227471638/>

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CHAPTER SEVEN: NARRATIVE SENSEMAKING

This chapter explains how to help people work with stories to make sense of issues they care about.

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[The four stages of narrative sensemaking](#)

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WHAT IS NARRATIVE SENSEMAKING?

What does that even mean?

What *isn't* narrative sensemaking?

Where did this come from?

WHAT IS SENSEMAKING?



Pertinent: focused on making decisions about things that matter



Practical: grounded in the concrete reality of lived experience



Playful: experimental, improvisational, multi-perspective

WHAT MAKES UP NARRATIVE SENSEMAKING?



Narrative

goes beyond sensemaking. People also share stories to strengthen bonds, explain complex concepts, entertain, inspire, persuade, and enforce social norms.

Narrative sensemaking is what happens when people share stories in order to make **decisions** about things that matter to them, **ground** their thinking in experience, and **play** with possibility.



Sensemaking

goes beyond narrative. People also compare options, present and refute arguments, test hypotheses, and observe facts.

FACILITATING NARRATIVE SENSEMAKING

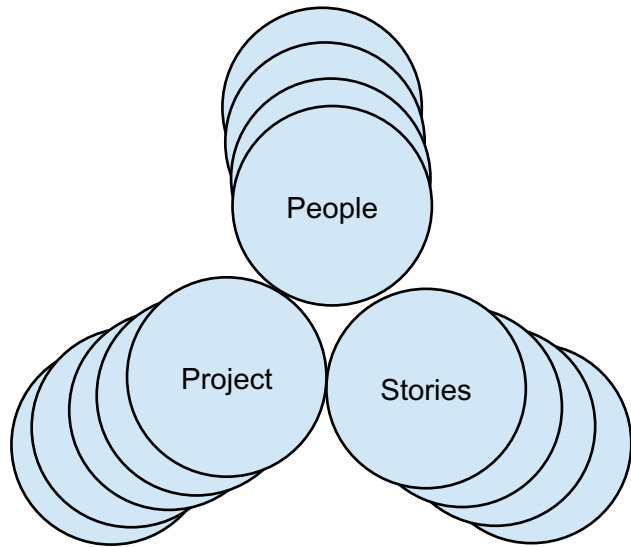
How do you make narrative sensemaking work for people?

What is involved?

What do you need to do?

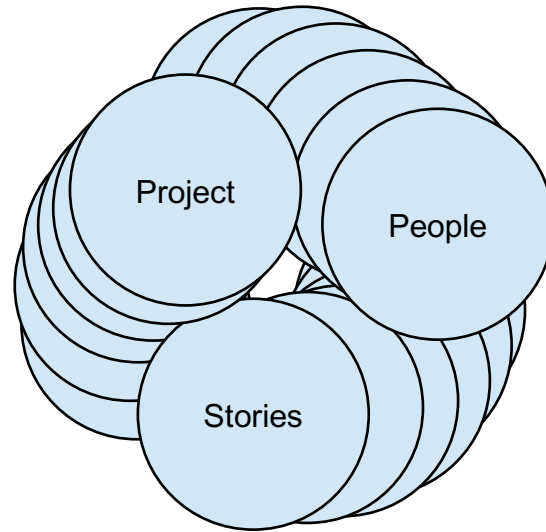
What do you need to avoid?

THE FOUR STAGES OF NARRATIVE SENSEMAKING



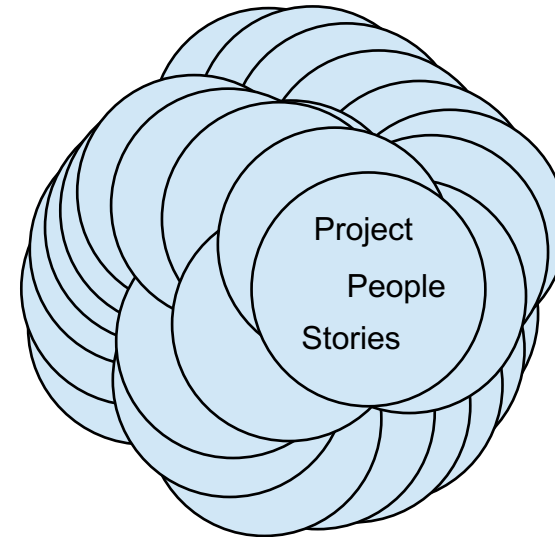
Contact

People are **introduced** to the project, the stories, and each other.



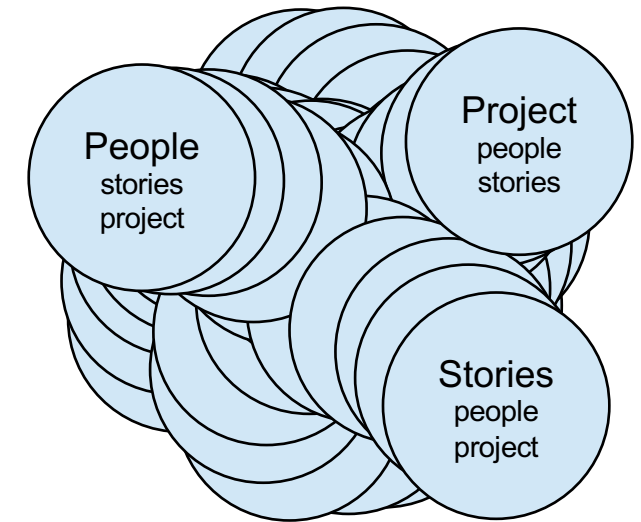
Churning

The essential elements of sensemaking – people, project, and stories – **shuffle** and reshuffle in varied ways.



Convergence

Stories, project, and people **come together** into new understandings and negotiated commonalities.

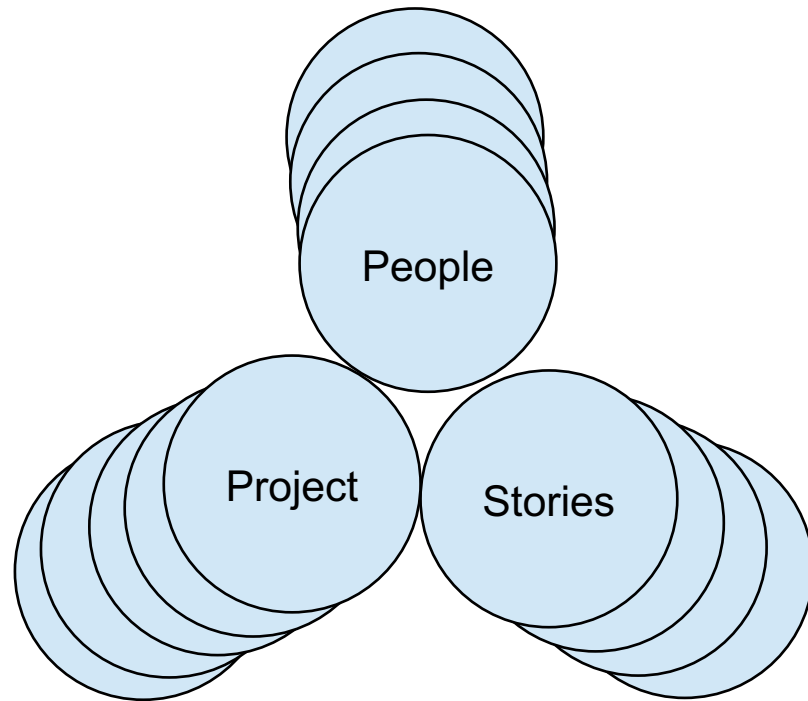


Change

Stories, people, and project change. People see things **differently** than they did; more stories are told; and the project evolves. ⁷

FACILITATING CONTACT

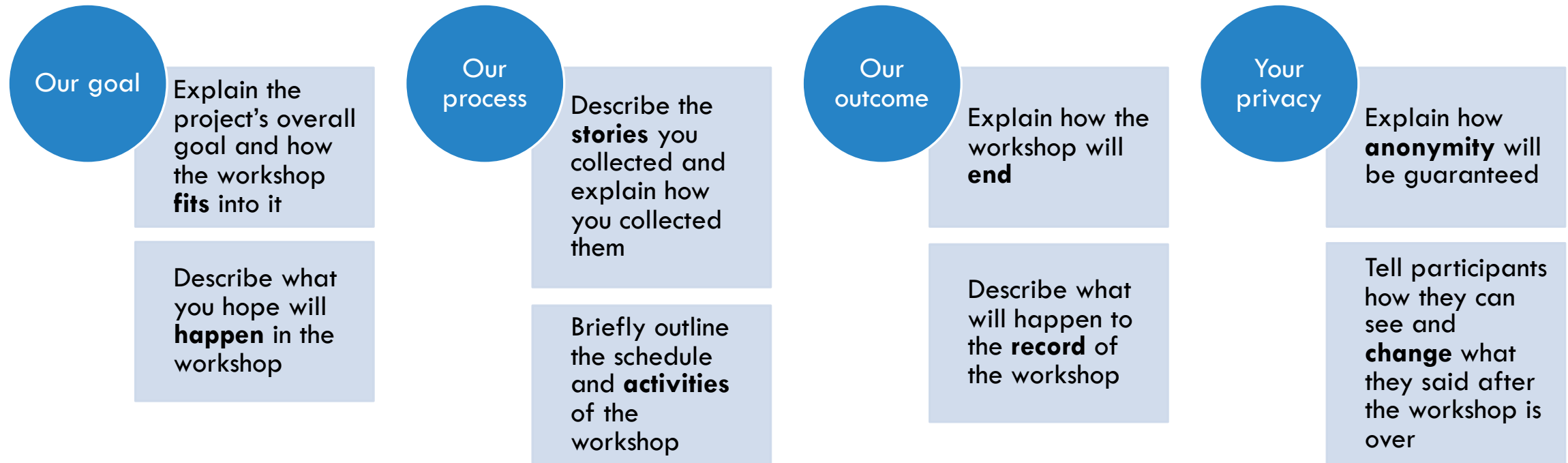
In the contact phase of sensemaking, people are introduced to the project, the stories, and each other. Because every other phase of sensemaking depends on this first part going well, **your facilitation** is more important in the contact phase than in any other phase.



Between people and stories	Participants encounter the body of collected stories – and through the stories, the people and perspectives they represent.
Among people	Participants come together in a place of mutual respect. They agree to listen to each other and to disagree in constructive ways.
Between people and project	Participants learn about the project and its goals. They agree to accept and support the project, but they also learn that they can adapt the project to meet their own needs.

FACILITATING CONTACT — INTRODUCING YOUR PROJECT

Orient participants in the project's past, present, and future. **Anticipate** and **alleviate** their concerns about the project so you can get started working with stories.



FACILITATING CONTACT – INTRODUCING STORY WORK

Every narrative sensemaking workshop comes with a predictable set of **misconceptions**. You can head these off at the start by explicitly addressing them.

Stories? Do you mean **fancy** stories like in movies and newspapers?

No. Today we will be working with **everyday** stories told by everyday people about everyday life.

Why? Why is that **useful**? Do everyday stories matter?

Yes. We can learn a lot by thinking about **what has happened** to people and how they feel about it.

Will this be hard? Is it only for smart or creative people? Am I **qualified** to do this?

You are. Working with stories is ancient, natural, and universal. **Everyone** is qualified.

I care about this issue. How can I make sure my side **wins** the argument?

You can't. We are not here today to debate, argue, prove, or win. Our goals are to **listen** and to **be heard**.

Most of all, working with stories relies on mutual **respect**. Today we will ask you to:

Respect the stories and the people who tell them as you would want them to respect the stories you have to tell.

Respect the process of working with stories together. It may seem strange to you, but it works.

FACILITATING CONTACT — INTRODUCING NARRATIVE SENSEMAKING

It is best not to *call* a narrative sensemaking workshop a narrative sensemaking workshop. Instead, decide on a **jargon-free description** that will work for you and your participants.

	Keep it collaborative	Keep it open	Keep it positive
Yes	You are invited to a get-together, talk, conversation, discussion	We will brainstorm, explore, discover, innovate	We will focus on issues, ideas, solutions, visions, concepts
No	Please attend a presentation, seminar, meeting, review, inquiry	We will investigate, analyze, assess, determine, identify	We will focus on problems, crises, blame, fault, guilt

FACILITATING CONTACT — INTRODUCING YOUR STORIES

Here are some ways **not** to introduce your collected stories to your sensemaking participants.

Here are the **precious** stories we carefully collected. These stories represent the true, authentic, respected voices of valued people in our community.

*Wow. I guess my stories won't **matter** as much as that. I'll keep quiet.*

Here are some stories you **might** want to look at.

*That sounds pretty **boring**. This is going to be a waste of my time.*

These are some **strange** stories we collected from strange people.

*What does this have to do with **me**?*

This is the narrative data we will be **analyzing** today.

*What? I'm supposed to **analyze** data? I don't know how to do that. I'd better leave.*

These stories will **touch** your heart.

*Sounds **suspicious**. What do they want from me? Are they trying to change my mind?*

Here are some stories to **spark** your imagination.

*This workshop must be for **creative** people. This isn't the right place for me.*

What **does** work? Something like this.

Today we will be looking at some stories about ____ told by members of our community. We will use the stories as **food for thought** in our discussion about ____.

*That sounds **interesting**. Count me in.*

FACILITATING CONTACT — GETTING PEOPLE WORKING WITH STORIES

Give people an **active task** to perform while they are experiencing your stories for the first time. It helps them develop a better understanding than passively reading or hearing the stories. You can use a sensemaking exercise as a contact task, but you can also give participants simpler instructions, like these.

Sort and count



Sort the stories into groups based on something you see in them or think about them. **Compare** the groups.

Rank and place



Place the stories in a **line** based on something you see in them or think about them. Which are **most** to **least** hopeful, impactful, risky? Talk about what you see.

Cluster and assemble



Move stories that seem **related** or connected close to each other. Talk about the **theme** or message of each cluster of stories. What do they say to you?

Choose and tell



Choose a story that resonates with you. **Retell** it in your own words. **Share** a story of your own that connects to it. (I also like to call this a “pairing” task.)

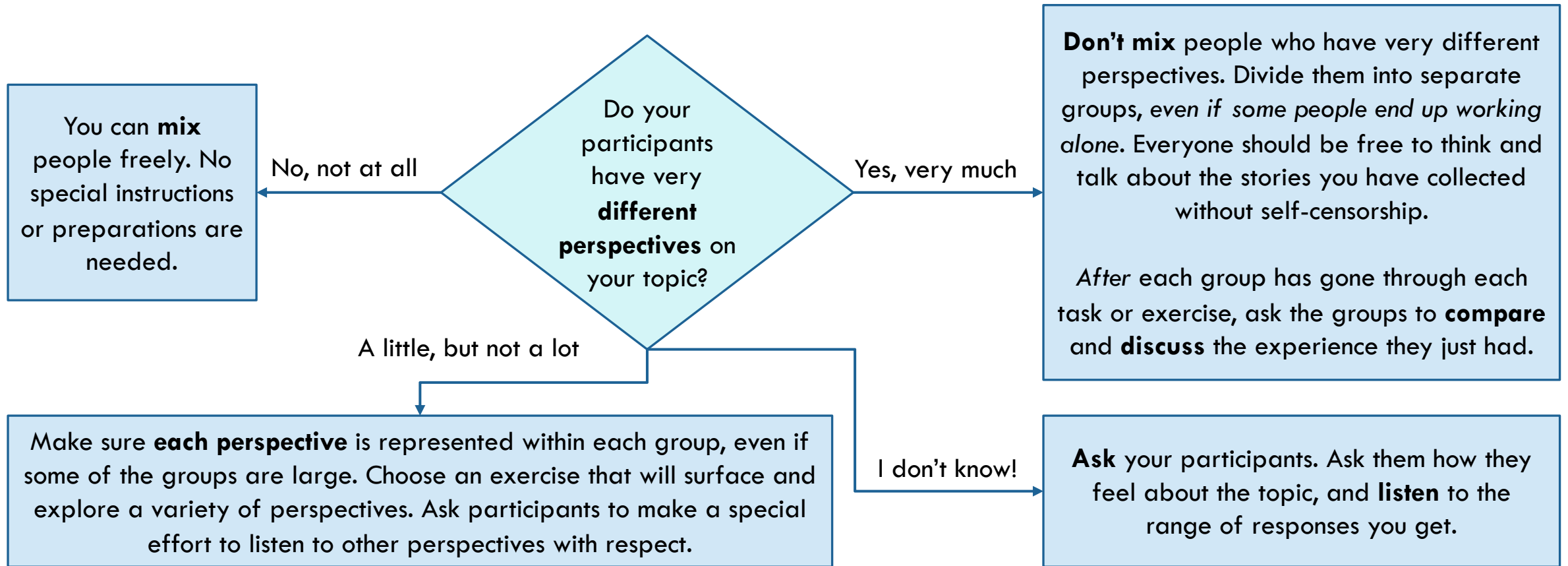
FACILITATING CONTACT — HELPING PEOPLE SAVE FACE

Saving face means doing things to avoid embarrassment. If you think the stories you collected will make the people in your sensemaking sessions feel a need to save face – if the stories will challenge their sense of self-respect or self-worth – design your contact activity to help them save face.

It's hard to save face when...	When we can't save face...	It's easier to save face when...
We are asked to evaluate or pass judgment on stories that connect to our essential identities (perhaps implicating ourselves as well).	We make surface-level evaluations like “This story is a pretty good one.” Or we make distancing statements like “I’m no good at this” or “I’m just here for the donuts.”	We are asked to notice resonances among stories and between stories and our own experiences, without anyone passing judgment on those connections.
We encounter stories under a spotlight , while being watched or expected to respond fully, immediately, and correctly.	We make nervous jokes like “That’s my story and I’m sticking to it.” Or we make fun of story work, saying things like “Okay children, gather round.” Or we virtue signal by campaigning for stories we think we ought to like.	We encounter stories in a quiet and private time and space. Our genuine responses are allowed to emerge without scrutiny, and we can share only the feelings we want to share.
We get no breaks from the stress of encountering challenging stories. Even though we care about the stories, our energy is depleted.	We start looking for exits . We ask questions like “What’s left to do?” and “Is this enough?” We nitpick irrelevant process details. We check our phones. We tune out and stop listening.	Well-placed breaks help us restore our energy and come back ready to explore and discover even more.

FACILITATING CONTACT — SETTING UP SMALL GROUPS

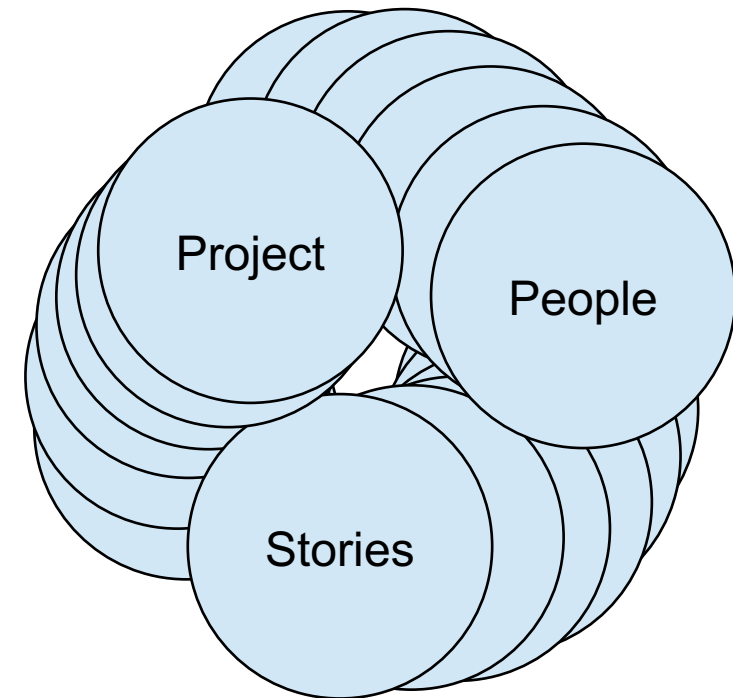
In sensemaking, small groups can range widely in size, from two (with no story sharing) to three (with story sharing) to as many as six participants. However, the **range of perspectives** within each small group is important.



FACILITATING CHURNING

In the churning phase of sensemaking, what happened during contact *keeps* happening – in complex, varied, and surprising ways. The people, project, and stories circle each other in a **dance** of juxtaposition and connection.

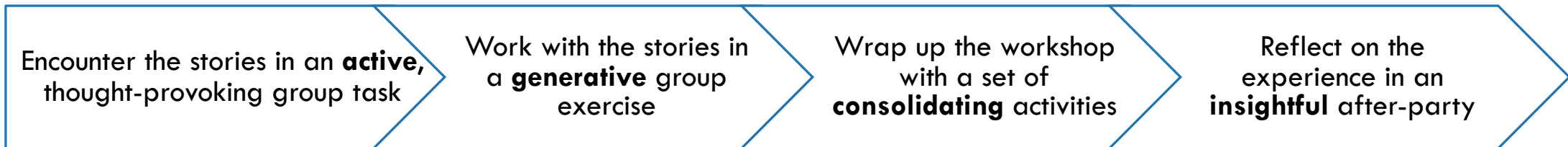
Between people and stories	As participants compare and contrast the collected stories with their own experiences, interesting and useful patterns come to light.
Among people	As participants explore meaning together, they are surprised by what they see. Their assumptions are challenged; their views are expanded.
Between people and project	As participants speak, listen, and learn, the project and its goals and plans bounce around into new configurations.



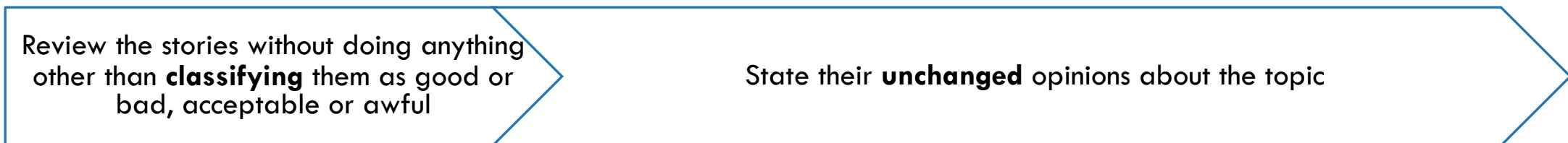
FACILITATING CHURNING — KEEPING THINGS MOVING

Sensemaking requires a high level of **energy**, movement, and action. Participants should **work actively** with the stories, using them, reacting to them, learning from them, being surprised by them. It is your job to help your participants understand why and how to apply their energy to this task. Expect some foot-dragging, and be ready to counter it.

You want your participants to:



Some of your participants will want to:

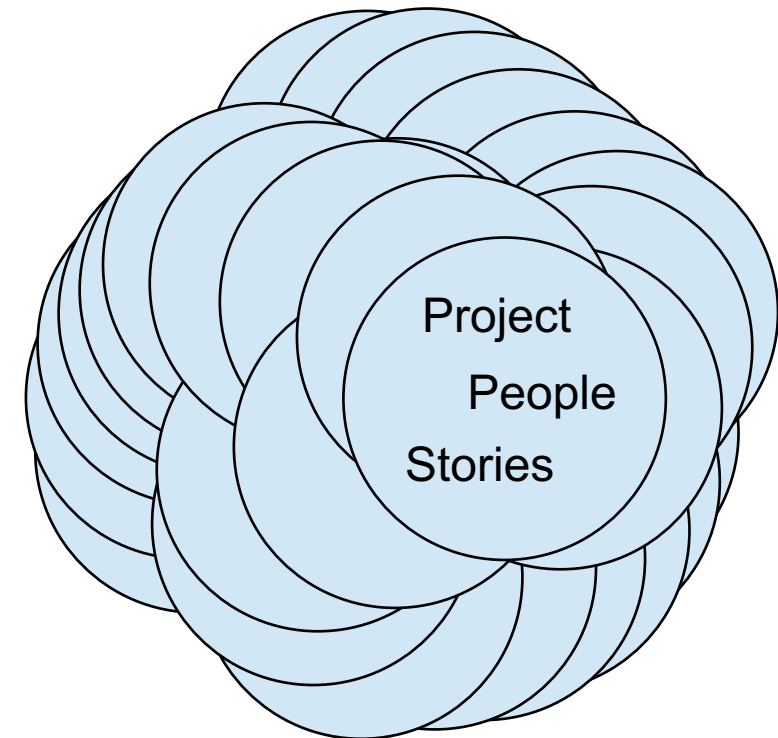


Help your participants see the **value** of sensemaking, and help them summon the energy to make it happen.

FACILITATING CONVERGENCE

In the convergence phase of sensemaking, things begin to **come together**. Shared understandings emerge and common ground is negotiated.

Between people and stories	The stories participants hear and tell in the workshop take their places inside the larger stories participants tell about themselves, the project, and the community.
Among people	Participants in the workshop come to know each other better. Gaps in understanding shrink, even when consensus is impossible.
Between people and project	The varied goals and plans in the minds of the workshop participants negotiate with each other, seeking common ground.



FACILITATING CONVERGENCE – SETTING UP CONDITIONS

To help the workshop move into a convergent phase, set up **conditions** for convergence by emphasizing collaboration, exploration, and communication.

	Imply that people should	Don't imply that people should
Manage expectations	<ul style="list-style-type: none"> Work together Find synergy React to stories Feel emotions Discover emergent patterns Make meaning together 	<ul style="list-style-type: none"> Work alone Compete Analyze stories Evaluate stories Find the right answer Be tested
Present tasks	<ul style="list-style-type: none"> Build things Constructively disagree Speak out with respect Build a coherent, internally complex composite that includes all perspectives 	<ul style="list-style-type: none"> Vote Prove points Stifle dissent Tell only happy stories Come to a single grand conclusion

FACILITATING CONVERGENCE — HELPING GROUPS COME TOGETHER

Watch for signs of convergence, and be prepared to **intervene** if convergence is not happening.

	As you watch each group, ask...	And if not...
Collaboration	Are group members working as a group , or individually, side-by-side? Are they using the word “we”?	Remind non-collaborating groups that their task is a collective one, and that their goal is to produce a single composite result.
Negotiation	Are people developing insights that matter to the whole group? Is everyone engaged and included? Or have some people checked out?	Challenge non-negotiating or checked-out groups to add complexity and difficulty to the exercise by ensuring that every perspective has been taken into account.
A shared journey	Is the group charting its own path ? Or is it doing only what is required?	Drop a hint to directionless groups that a certain degree of collaborative creative license is both acceptable and encouraged.

FACILITATING CONVERGENCE — HELPING STORIES COME TOGETHER

When sensemaking is in a convergent phase, certain **story types** tend to become noticeable. You and your participants can watch to see where these stories are coming to the surface.



Pivot stories

keep appearing again and again because they are found at important **intersections** of meaning in the workshop, the project, and the community or organization.



Discovery stories

are “aha” stories. They help people discover **remarkably surprising** insights about the experiences of others that they had not seen or understood before.



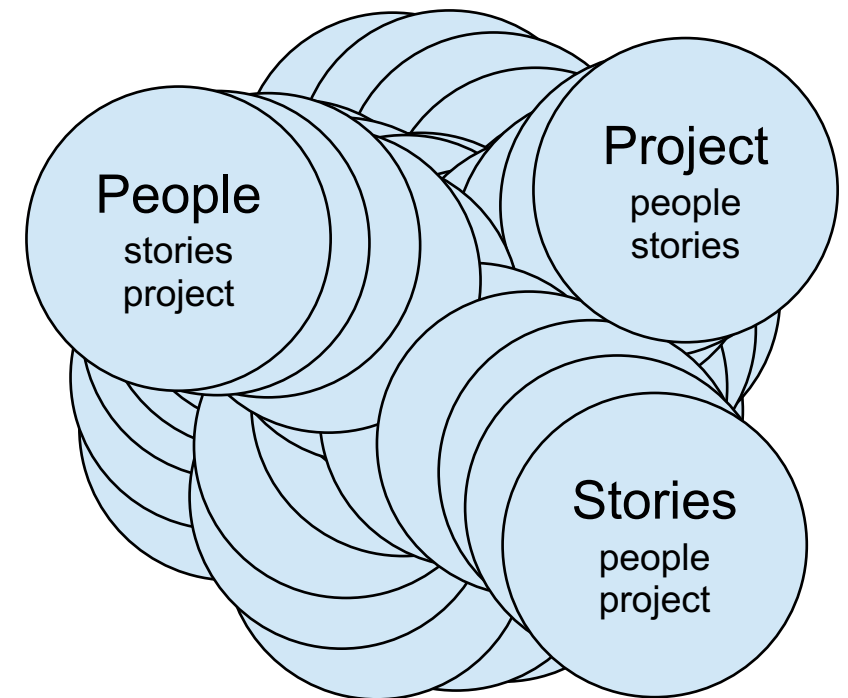
Voice stories

cry out to be passed on. They bring little-heard perspectives into wider awareness, breaking down longstanding barriers in the form of assumptions, fears, and stereotypes.

FACILITATING CHANGE

Sensemaking workshops don't always create immediately obvious change. The impact of participation might surface days or weeks later, as people reflect on their experiences. But **change is the goal**.

Between people and stories	Participants are changed by the stories they heard and told in the workshop, and the stories they tell and interpret during the workshop change the project and the community.
Among people	Participants leave the workshop with new perspectives on the people and topics involved in the project. After the workshop, they tell stories about it and about the project to other people, and the change spreads.
Between people and project	The workshop (and the stories people tell about it) transforms the goals and plans of the project and its participants.



FACILITATING CHANGE — SETTING THE STAGE

Even though change tends to happen at the end of a sensemaking workshop, you can't start facilitating change at the end. You have to facilitate it **throughout** the workshop.



Set an expectation of change

As you speak to participants, make it clear that you expect change to happen in the workshop. But keep your definition of change **broad** and **flexible**. Communicate a sense of **respectful curiosity** about what will emerge as the group works together.

Don't oversell consensus

Few sensemaking workshops end in perfect agreement. That's fine, because **agreement is not the point** of sensemaking. It's not the point of stories, either. People have always used **nested** stories to represent and explore internally complex situations from many perspectives. So if the story that emerges from your workshop includes conflicting views, **you've done it right**.

Communicate this expectation to your participants.



FACILITATING CHANGE — WRAPPING UP

The easiest way to wrap up a sensemaking workshop is by filling up **lists**. This final convergence helps people create a **take-home message** they can look back on later. Here are a few types of lists you might want to use.

Aspects of the experience

Discoveries (eye-openers)
Mysteries (puzzles)
Dilemmas (quandaries)

Opportunities (possibilities)
Issues (obstacles)

Ideas (thoughts)
Recommendations (suggestions)
Perspectives (viewpoints)

You can also ask people to choose a story to **illustrate** each aspect they list.

Convergent stories

Pivot stories (that just kept coming up)

Discovery stories (that created “aha” moments)

Voice stories (that cried out to be passed on)

Other stand-out stories

Stories that show us the way forward
Stories that capture the present moment
Stories that explain the past

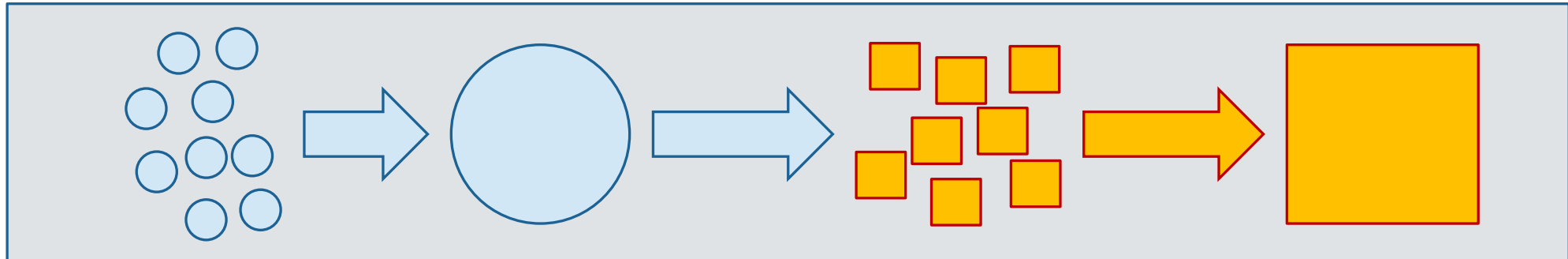
Stories we can be proud of
Stories we need to understand
Stories we need to fix

Stories ___ need to hear
Stories ___ need to tell

People can fill these lists as one large group, or you can ask each small group to write their own list, then share it with the larger group.

FACILITATING CHANGE — INCORPORATING OTHER METHODS

Another way to wrap up sensemaking is to incorporate a **second method** of decision support. Narrative sensemaking works well as a **complement** to other planning, evaluation, and decision-support methods. Many checklists, scorecards, models, and other structured planning methods can input the output of a narrative sensemaking exercise.



For example:

In **SWOT** analysis, participants list Strengths, Weaknesses, Opportunities, and Threats. These list elements can be drawn out of the stories, patterns, and themes discussed in sensemaking.

In **Causal Layered Analysis**, participants consider issues at four levels: Official explanations; systemic causes; worldviews and discourses; metaphors and myths. Stories, patterns, and themes drawn from sensemaking can inform each CLA layer.

Scenario planning is another activity that starts with list-making. You can improve the process by listing stakeholders, trends, driving forces, and uncertainties you discovered during narrative sensemaking.

FACILITATING CHANGE — THE AFTER-PARTY

Sometimes the best part of a sensemaking workshop happens **after it ends**. People sit around and chat about the experience, and they say things they weren't ready to say before. So if you're recording the session, keep recording, and if you're taking notes, keep writing. This is a good time to...



Open up to unfiltered reactions

Ask if there is **anything else** people would like to say that they didn't feel comfortable saying in the workshop itself. Is there a final **message** they would like to convey to you, the group, the community, or those in charge?



Invite reflections on the experience

Ask **meta-level** questions about the workshop experience. What was it like for them? What was familiar or strange? What did they learn? How did it **feel**? Was it exciting, annoying, uncomfortable, hopeful?



Gather feedback on the workshop

Ask participants to **evaluate** PNI and your facilitation. Do they think the workshop was worth their time? What aspects of it did they like and dislike? How would they **change** it if they could?

PRACTICAL MATTERS

How do you set this all up?

What are the nuts and bolts of facilitating real narrative sensemaking with real people?

What are some tips and tricks for making this work?

PRACTICAL MATTERS — TIME FOR SENSEMAKING

Each activity in a sensemaking session must build upon the activity that preceded it. For this reason, sensemaking **takes longer** than story sharing and is **harder to compress**.



You can facilitate a productive story-sharing session in an hour, even if it is your first time doing it. In contrast, a productive 2-hour sensemaking session is hard for even an experienced facilitator to pull off. If this is your first time facilitating narrative sensemaking, allocate **at least 3 hours** to each of your first few sessions.

Sensemaking also requires **more mental energy** than story sharing. Schedule your sensemaking sessions in the morning or afternoon, when people are more alert and ready to think clearly and deeply.



Also, plan ways to **renew flagging energy** during the workshop. At least a few minutes of **break time** per hour are critical. If you're meeting physically, some **food and drinks** can help as well.

PRACTICAL MATTERS — SPACE FOR SENSEMAKING

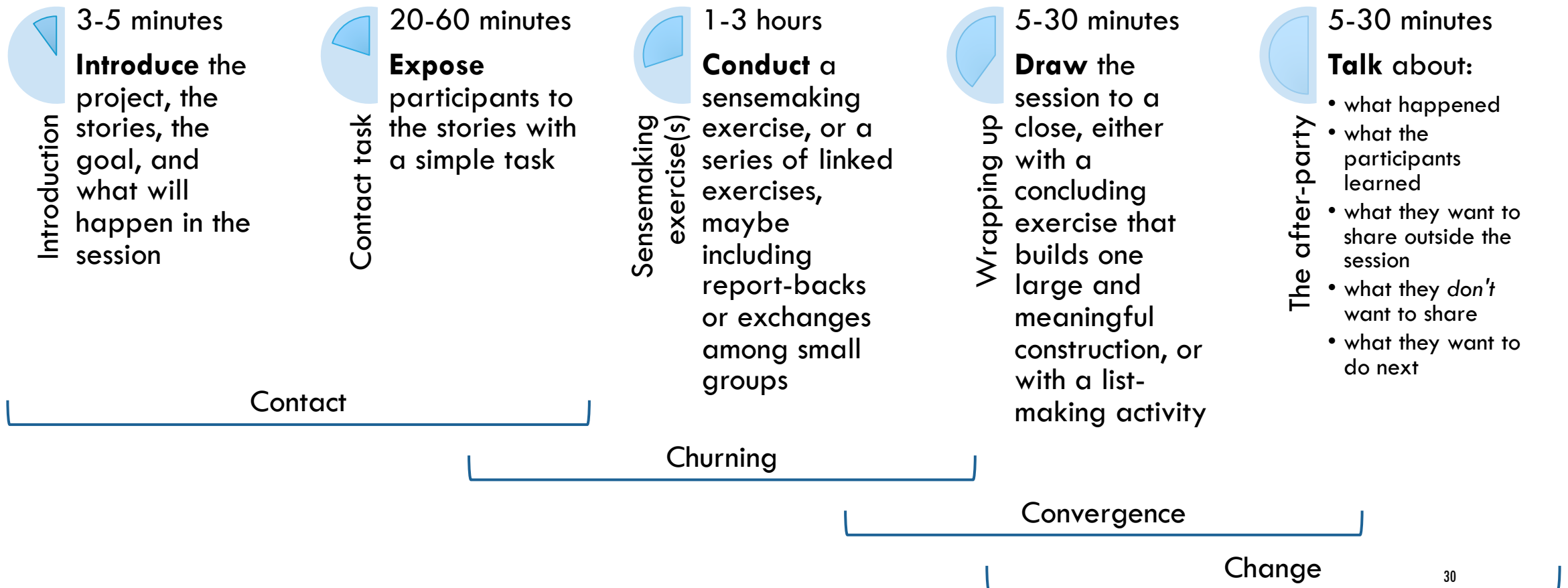
Sensemaking requires **lots of space**, but for a different reason than story sharing does.

- People in story sharing sessions need space to record conversations without cross-talk.
- People in sensemaking workshops need **surfaces** to build patterns on.
 - In a **physical** workshop, surfaces are usually walls and tables, though clean floors can work too. **Giant sticky notes** (easel pads) make great sensemaking surfaces. You can stick them anywhere, people can write all over them, and you can roll them up and take them home when the workshop is over.
 - In an **online** workshop, surfaces are whiteboards and shared documents. Look for an application that gives you **multiple pages** to edit at once. Make sure participants can move between the pages as easily as if they were walking between the walls in a room.



PRACTICAL MATTERS — YOUR SESSION AGENDA

Generally speaking, most sensemaking sessions have a structure like this.



PRACTICAL MATTERS — YOUR SESSION RECORD

Reasons to make a record:

Assets

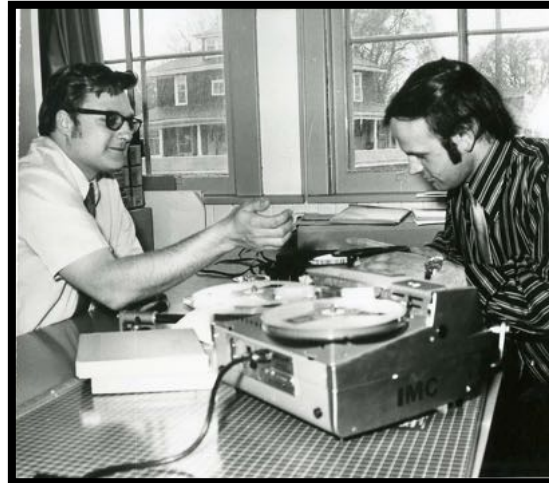
- To **capture** knowledge that would otherwise be lost
- To **respect** the people who took the time to show up
- To have something to **give** to participants
- To gather materials for an **intervention** campaign
- To use the insights in **future** projects

Proof

- To **show** your work to funders
- To get **funding** for more work
- To **evaluate** the project or PNI
- To **convince** people to use PNI

Learning

- To **develop** your PNI practice
- To document your **experiments**
- To **communicate** what you have learned to others



Reasons **not** to make a record:

Sensitivity

- Your participants don't **want** to be recorded
- Your participants don't **trust** you
- Your topic is **sensitive** or private

Resources and needs

- You don't have the **time** or **resources**
- Your project is very **small**
- You just don't feel you **need** a record



PRACTICAL MATTERS — RECORD ELEMENTS

These are some **elements** you might want to include in your session record, with my observations about how easy and useful they are. Always ask your participants for their **permission and help** in getting the session record ready to be shared with the rest of the community or organization.

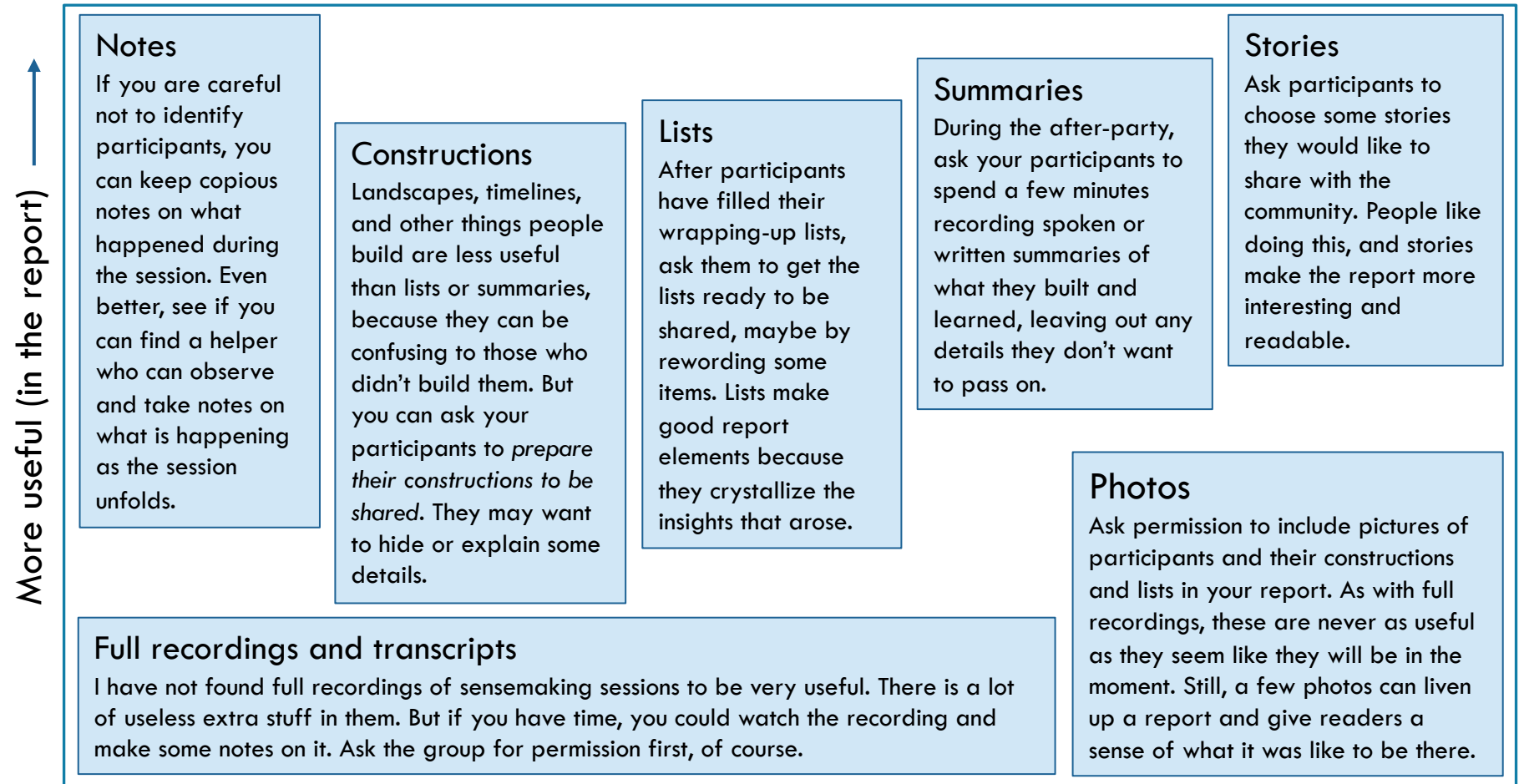


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Boy smiling <https://www.flickr.com/photos/137007730@N03/48706200796/>

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Clothes on line https://upload.wikimedia.org/wikipedia/commons/thumb/3/30/4724Clothes_lines_in_the_Philippines.jpg/2048px-4724Clothes_lines_in_the_Philippines.jpg

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Fox sleeping – Peter Trimming, 2012, CC-BY, https://commons.wikimedia.org/wiki/File:Sleepy_fox_01.jpg

People taking picture of whiteboard – Steve Juvetson, 2015, CC-BY,

[https://commons.wikimedia.org/wiki/File:Reflections_on_the_new_Machine_Age_%E2%80%94_inequality_and_the_economy_\(16620787618\).jpg](https://commons.wikimedia.org/wiki/File:Reflections_on_the_new_Machine_Age_%E2%80%94_inequality_and_the_economy_(16620787618).jpg)

Guys with recording stuff <https://www.flickr.com/photos/cabhc/40288181801/>

Weird sculpture of writing person <https://www.flickr.com/photos/28469941@N02/14194286714/>

SENSEMAKING EXERCISES

Contact tasks

Easiest to facilitate and participate

Low-to-medium difficulty

Medium-to-high difficulty

Hardest to facilitate and participate

Sorting

2+ people, 20+ minutes

Twice-told stories

4+ people, 45+ minutes
No other requirements

Story elements

2+ people, 2.5+ hours
Participants must be able and willing to explore abstract concepts

Ground truthing

4+ people, 90+ minutes
Requires a shared document about the same topic as is covered by the stories

Timeline with alternatives

2+ people, 2.5+ hours

Ranking

2+ people, 20+ minutes

Timeline

2+ people, 2+ hours
Requires stories with common history or process

Landscape

2+ people, 90+ minutes
Participants must be able and willing to explore abstract concepts and nuanced mixes

Local folk tales

2+ people, 90+ minutes
Requires stories that explore emotions (and participants who are willing to do so)

Composite stories

9+ people, 3+ hours
Participants must be willing to use their imaginations

Clustering

2+ people, 20+ minutes

Pairing

3+ people, 30+ minutes

CONTACT TASKS — SORTING

2+ people, 30+ minutes. Use this contact task to introduce your collected stories to your participants before you start a sensemaking exercise.

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each.
1	Facilitator	Hand each group a full deck of story cards. Explain where they came from.
10+	Small groups	Read the stories , separately or together, silently or aloud. Absorb the stories as a group.
10+	Small groups	Talk about the variation you see in the stories. Think of a set of categories you could use to sort the stories, categories that mean something to you. Maybe some of the stories are forward-looking, some consider the present, and some look back into the past. Maybe you want to identify some themes in the stories, like challenge or hope or planning or crisis. Think of some way to separate the stories into groups that seems like it will be interesting. Then sort the stories and count the groups.
5+	Everyone together	Each group, explain how you sorted the stories, what you found out, and what that meant to you.

Online: Use breakout rooms for small groups.

CONTACT TASKS — RANKING

2+ people, 30+ minutes. Use this contact task to introduce your collected stories to your participants before you start a sensemaking exercise.

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each.
1	Facilitator	Hand each group a full deck of story cards. Explain where they came from.
10+	Small groups	Read the stories , separately or together, silently or aloud. Absorb the stories as a group.
10+	Small groups	Talk about the variation you see in the stories. Think of a dimension along which the stories seem to vary. Maybe some stories are more optimistic than others. Maybe some have more conflict, or cooperation, or innovation. Think of a way to rank the stories that seems like it would be interesting. Then line up the stories along that dimension. You can do this with the story cards you were given, or you can copy their names onto sticky notes and line them up on a wall or table.
5+	Everyone together	Each group, explain how you ranked the stories, what you found out, and what that meant to you.

Online: Use breakout rooms for small groups.

CONTACT TASKS — CLUSTERING

2+ people, 30+ minutes. Use this contact task to introduce your collected stories to your participants before you start a sensemaking exercise.

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each.
1	Facilitator	Hand each group a full deck of story cards. Explain where they came from.
10+	Small groups	Read the stories , separately or together, silently or aloud. Absorb the stories as a group.
10+	Small groups	Lay all of the stories out on the table in front of you, or copy their names onto sticky notes and stick them to a table or wall. Then move the stories around so that similar stories are close together and different stories are far apart. Don't worry about <i>why</i> stories are similar or different. Just keep moving stories around until it feels like you have represented the similarities and differences in the stories by how close they are together. Then stand back and look at the clusters of stories you have created. What do they mean? Can you give the clusters names ?
5+	Everyone together	Each group, explain how you clustered the stories, what you found out, and what that meant to you.

Online: Use breakout rooms for small groups.

CONTACT TASKS — PAIRING

3+ people, 30+ minutes. Use this contact task to introduce your collected stories to your participants – and optionally, to collect some more stories – before you start a sensemaking exercise.

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 3-4 people each. (Note the minimum of 3.)
1	Facilitator	Hand each group a full deck of story cards. Explain where they came from.
1	Facilitator	If the stories are being recorded, start a separate recording device for each small group.
5	Everyone separately	Read the stories silently, passing them around so each person gets to read each story. As you read, choose one story that resonates with you. Then think of an experience you have had that the story reminds you of.
20+	Small groups	Going around the circle, each person, read or retell the story you chose, then tell the story it reminded you of. Give each new story a name and write it on a sticky note.
5	Everyone separately	If the stories are being recorded, answer questions about each new story you told, and about yourself.

Online: Use (and possibly record) breakout rooms for small groups.

TWICE-TOLD STORIES FOR SENSEMAKING

4+ people, 45+ minutes. No preparation required.

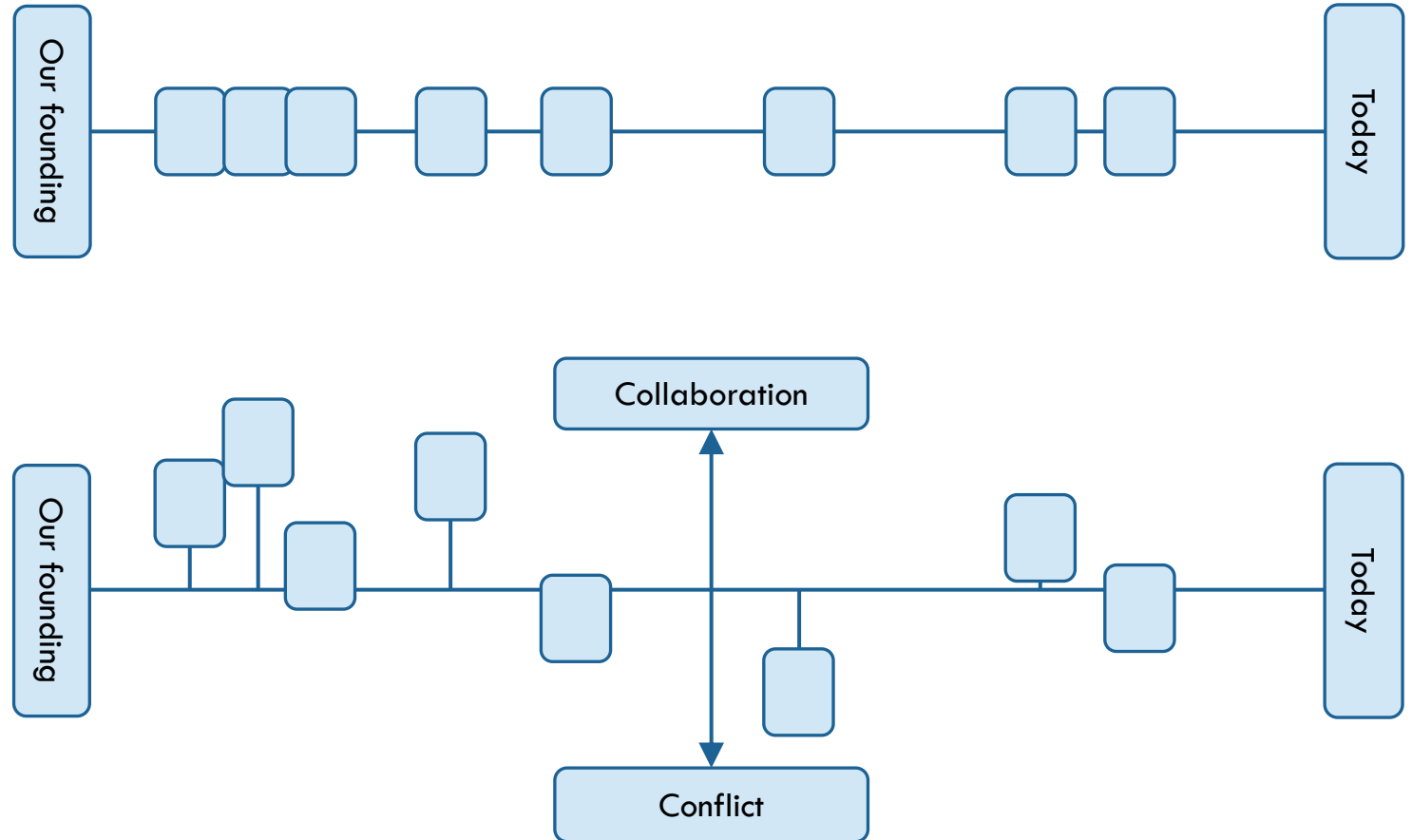
2 minutes	Facilitator	Briefly introduce the project, the topic, the stories, and the exercise.
2	Facilitator	Set up at least 2 groups of 2-4 people each. Aim for diversity within groups.
1	Facilitator	Hand each group a full deck of story cards.
20+	Small groups	Read through the stories, separately or together, silently or aloud. Absorb the stories as a group. Then, working together, choose one story that stands out for some reason. Talk about why that particular story stands out to you. What do you think it means ? (If you can't agree on one story, agree on two.)
15+	Everyone together	Someone (anyone) from each group, retell the story you chose. Explain why you chose it and what you think it means.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use breakout rooms for small groups.

TIMELINE FOR SENSEMAKING PREPARATION

2+ people, 2+ hours. Before the exercise, read through your stories and choose start and end dates for a timeline on which the stories could be placed. This could either be the **history** of a place or group important to the stories, or it could be stages in a **process** the stories are about, like a visit to the doctor. Make sure most of the stories will fit onto the timeline you choose. *Alternatively, you can ask people to choose their own start and end dates.*

Next, choose a **dimension** that is present in the stories – something that varies from one story to another, something that you think will be meaningful to the people who are doing the exercise. *Alternatively, you can ask people to choose a second dimension themselves.*



TIMELINE FOR SENSEMAKING — PART 1

5 minutes	Facilitator	Introduce the project, the topic, the stories, and the exercise.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Hand each group a full deck of story cards.
5	Small groups	Mark a horizontal line on a wall, table, or giant piece of paper. Place the start and end labels (those given to you by the facilitator or those you came up with yourselves) on either end of the line.
25+	Small groups	Read the stories , separately or together, silently or aloud. As you read each story, write its name on a sticky note and place the note on the timeline where it belongs.
20+	Small groups	When you have finished placing all of your stories onto your timeline, look at the patterns they form. Where do you see clusters? Gaps? Turning points? Links between stories? Do any stories seem out of place?
5	Facilitator	Now would be a good time for a short break .

See the next page for the rest of the exercise...

TIMELINE FOR SENSEMAKING – PART 2

2 or 5	Facilitator or small groups	Facilitator: Explain the second dimension . Or small groups: Choose a second dimension you see in the stories, something that varies and is meaningful to you. In either case, place top and bottom labels describing the second dimension on your timeline.
30+	Small groups	Move each story up or down to where it belongs on the second dimension. If a story belongs in two places, copy the note and put it in two places, writing on each note <i>why</i> you put it there.
20+	Small groups	When you have finished placing all of your stories onto your timeline, look at the patterns they form. Where do you see clusters of stories? Are there gaps ? What does that mean? Do you see turning points along the timeline where the stories change? What does <i>that</i> mean? Are there any surprising links between stories? Do any stories seem out of place ? Why is that?
20+	Everyone together	If you have more than one group, each group, explain the patterns on your timeline. You were working with the same stories, but you might have arranged them differently. Talk about that.
10	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use breakout rooms for small groups.

STORY ELEMENTS

PREPARATION

2+ people, 2.5+ hours. Before the workshop, choose a **question and type of story element** to use in the exercise. Story elements are **packages of meaning** derived from groups of stories. Which will work best depends on your project, your participants, and your stories. You can also show people multiple questions and let them choose their own. *Participants will need twice as much wall or table space for this exercise as for the landscape or timeline exercises.*

Question	Element type	Examples
What is going on in this story?	Situations	on the ropes, safe haven, between a rock and a hard place, when it rains it pours
Who is doing things in this story?	Characters	unscrupulous opportunist, worker bee, winner, devil, showboat, hero, figurehead
What matters to the characters in this story? What do they like and dislike ?	Values	freedom, innovation, happiness, time, money, perfection
How are characters related to each other in this story?	Relationships	cat and mouse, servant and master, opposites attract, planet and moon
Why do the characters in this story do what they do?	Motivations	climbing the ladder, making a name for myself, I did what was asked of me
What do people believe in this story?	Beliefs	only the strong will survive, compassion is peril, keep your eyes open, freedom isn't free
Who or what stands in opposition in this story?	Conflicts	arms race, simmering discontent, chest-beating, emotional blackmail, chicken-and-egg problem, vicious circle, lesser of two evils, rock and hard place, endless loop
What changes are important in this story?	Transitions	the busy streets are so quiet, enemies were once friends, remember the good old days

STORY ELEMENTS — PART 1

5 minutes	Facilitator	Introduce the topic and the exercise.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Hand each group a full deck of story cards.
2 or 5	Facilitator or small groups	Facilitator: Show participants the story element question you chose. Or, small groups: Choose a story element question from those the facilitator shows you.
30+	Small groups	Read each story as a group, silently or aloud. As you read it, consider the question you were given (or chose). Write 2-4 brief answers to the question on sticky notes. For example, if the question is “What is going on in this story?” you might write notes that say “Argument,” “Sharing,” and “Breakthrough.” Keep doing this until you have worked your way through all of the stories. Just pile the sticky notes up in one pile. It won’t matter which story they came from.
20+	Small groups	Place all of your sticky-note answers onto a table or wall (or screen). Then move the answers around so similar answers are close together and different answers are far apart. Eventually you will arrive at several clusters of answers. Give your clusters names , and write the names on sticky notes.
5	Facilitator	Now would be a good time for a short break .

See the next page for the rest of the exercise...

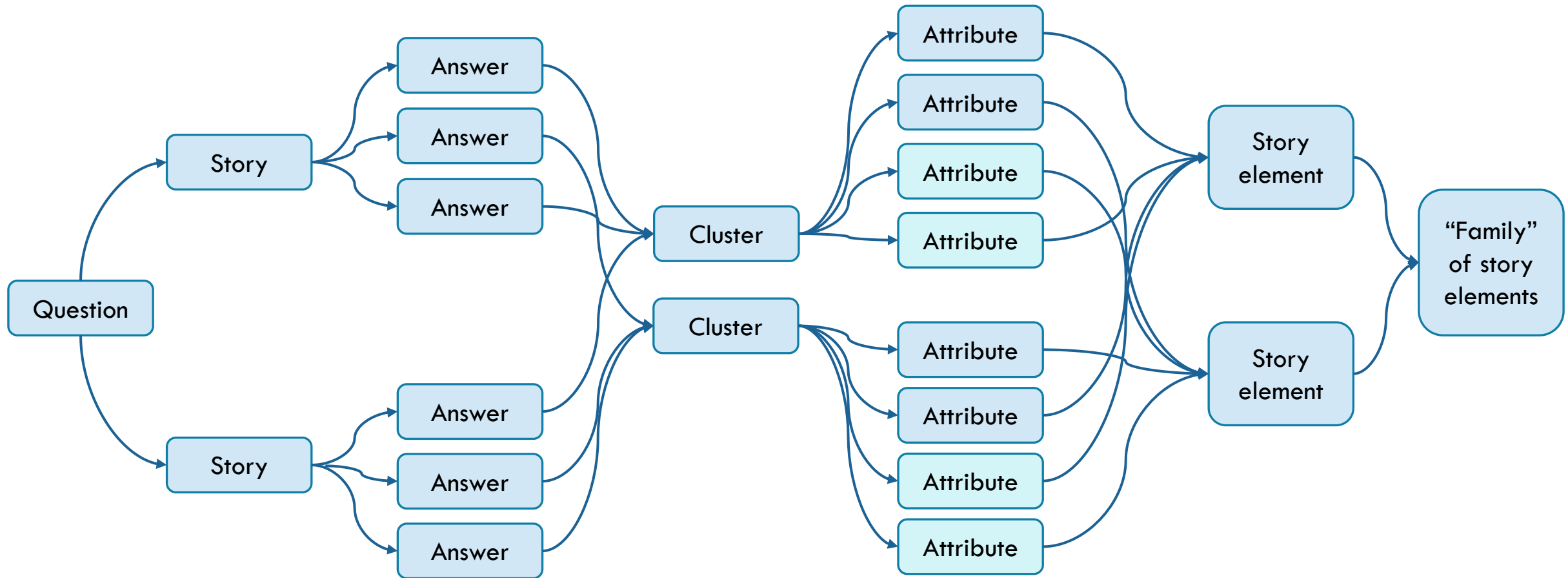
STORY ELEMENTS — PART 2

20+	Small groups	Look at each cluster of answers you have. List 2-4 positive and 2-4 negative attributes of each cluster. For example, say you have a cluster where all of the answers have to do with communication. That's what you called the cluster: Communication. So, what's a good thing about communication? It brings people together. That's a positive attribute. Write that down. Communication also helps people get help. That's another positive attribute. But communication can also be deceptive. That's a negative attribute. Write 2-4 positive and negative attributes (on sticky notes) for each cluster.
10+	Small groups	Pick up your new attributes and carry them, all together, to a new, empty space. Ignoring where they came from, cluster your attributes together, placing like with like, as you did before with your answers. When you have finished, you will have a new and different set of clusters. Give your new clusters names. Those names are your story elements : situations, characters, values, and so on.
20+	Small groups	Look over the story elements you have created. Talk about what they mean about your topic and community. How do they interact with each other? If they were a family , how would they get along? If they were a team , how would they work together? If they were adversaries , how would they fight? Mix and match your story elements. Make up some fictional stories about them. Talk about things that could, could not, should, and should not happen as they interact.
30+	Everyone together	If you have multiple groups, show each other your story elements. Talk about similarities and differences. Maybe talk about what would happen if elements from different groups interacted.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use breakout rooms for small groups.

STORY ELEMENTS – DIAGRAM

This diagram might help to make the steps of the story-elements exercise more clear.



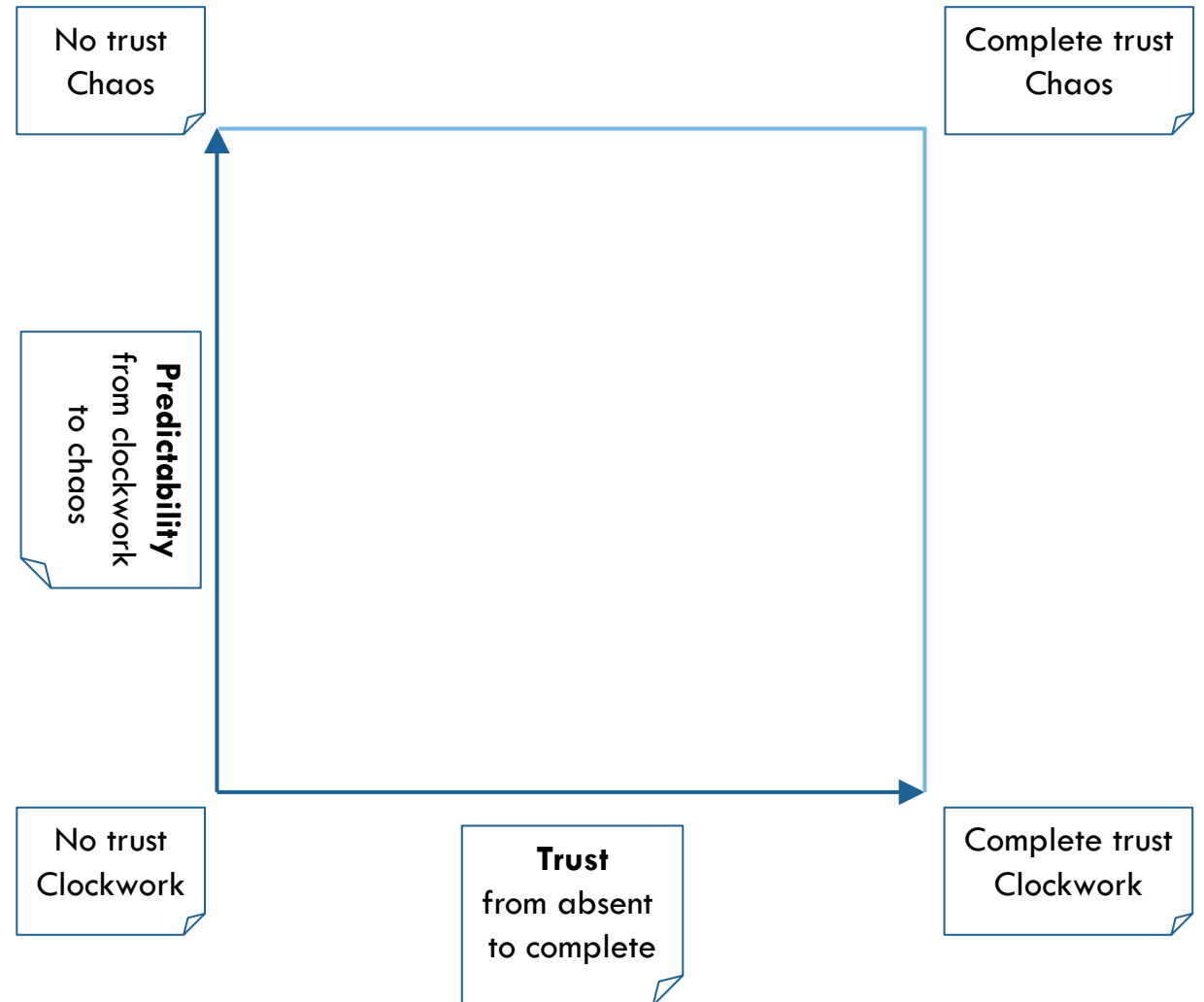
LANDSCAPE FOR SENSEMAKING PREPARATION

2+ people, 90+ minutes. Before the workshop, read through your stories and choose two **dimensions** that are:

- **in the stories** (test the dimensions by placing some stories on them yourself)
- **meaningful** (they matter to your topic)
- **independent** (not correlated)

Each dimension should go **from** something **to** something, like “Trust: from absent to complete” or “Predictability: from clockwork to chaos.”

Optionally, you can prepare 2-8 dimension pairs and ask each small group to **choose a different pair** of dimensions to work with. This option takes longer, but provides more variety in construction.



LANDSCAPE FOR SENSEMAKING

5 minutes	Facilitator	Introduce the topic, the exercise, and the pair(s) of dimensions.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Hand each group a full deck of story cards.
5+	Small groups	If the facilitator has shown you multiple pairs of dimensions, choose one to work with. In either case, write your dimension names on sticky notes. Also write names for each corner of the space (e.g., “High trust, low predictability”). Use your sticky notes to mark out a space about one meter square.
30+	Small groups	Read the stories , separately or together, silently or aloud. As you read each story, write its name on a sticky note, then place the note into the space where it belongs. If you can’t decide or agree on where a story belongs, write its name down twice, and put it in two places, writing on each note why you are putting it there. Keep doing this until you have gone through all of the stories.
30+	Small groups	Stand back and look at the patterns you have created. Do you see clusters of stories? Do they have common themes ? Are there gaps where there are no stories? What does that mean? Are there boundaries between different groups of stories? Are stories far apart in the space linked in some other way? Annotate your space to record what you see.
20+	Everyone together	If you have multiple groups, show each other your spaces. Talk about similarities and differences in how you placed the stories and what you think the placements mean.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

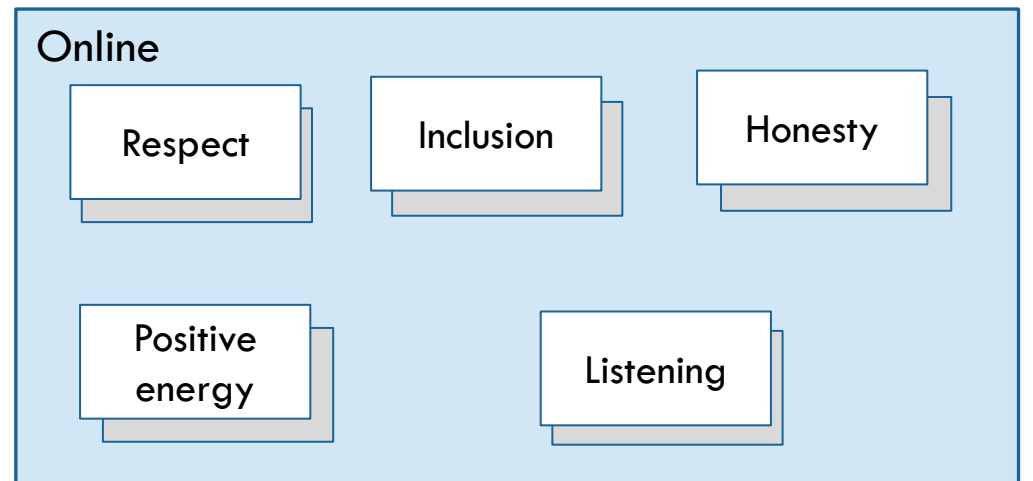
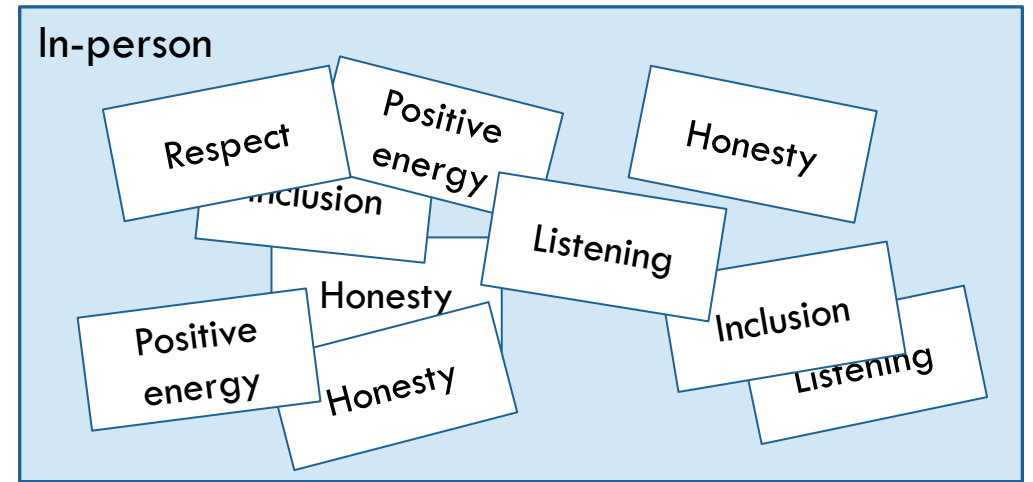
Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use breakout rooms for small groups.

GROUND TRUTHING FOR SENSEMAKING PREPARATION

4+ people, 90+ minutes. Before the session, break up an official **document** (such as a mission or values statement) into **portions**, each of which covers one concept or statement.

- In person: Print each text portion on a sheet of **paper**. Fold each paper in half, tape it shut, and write a **descriptive name** (in large print) on the outside. Prepare a few identical copies of each portion. Just before the session starts, **scatter the papers** on a table in plain sight. Let people see the names on the sheets, but don't let them open them up.
- Online: At the start of the session, show or send people a document in which only the descriptive names of the text portions are shown. Later, give people a way to reveal the whole texts (e.g., with an HTML link, a hidden "spoiler" text, or a second "sticky note" that was originally hidden under the name).

Also, **choose two relevant aspects of experience** you would like people to explore as they share stories. The default set for this exercise is **beliefs** and **values**, but you can use any set of two aspects people are likely to find in most stories: emotions, conflicts, perspectives, problems, solutions, dilemmas, discoveries, helping hands, and so on. Choose aspects that you think will matter to the topic and to your participants.



GROUND TRUTHING FOR SENSEMAKING

5 minutes	Facilitator	Introduce the topic, the document, the exercise, and the sheets of paper on the table.
3	Everyone separately	Look over the papers on the table. Choose one you find interesting. Take it back to your seat. Do not open it.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. Maximize diversity within each small group.
1	Facilitator	Hand each group a full deck of story cards.
15+	Everyone separately	Read the stories silently, passing them around so each person gets to read each story. As you read, choose one story that best connects to the words printed on the piece of paper you picked up.
50+	Small groups	One person at a time: Read or retell the story you connected to the words on the paper. One listener: Jot down any beliefs [or other aspect of experience the facilitator has asked you to listen for] you hear in the story. The other listener: Jot down any values [or other aspect] you hear in the story. Afterward, both listeners, report back on what you heard. Finally, together, open the sheet of paper and read what it says inside. Discuss any connections or gaps you see between the story, the beliefs and values [or other aspects] expressed in it, and what it says on the paper. Repeat this process until each person has selected and read or retold one story. If you have extra time, pick up more papers and go through the process again.
15+	Everyone together	Talk about the patterns you saw.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

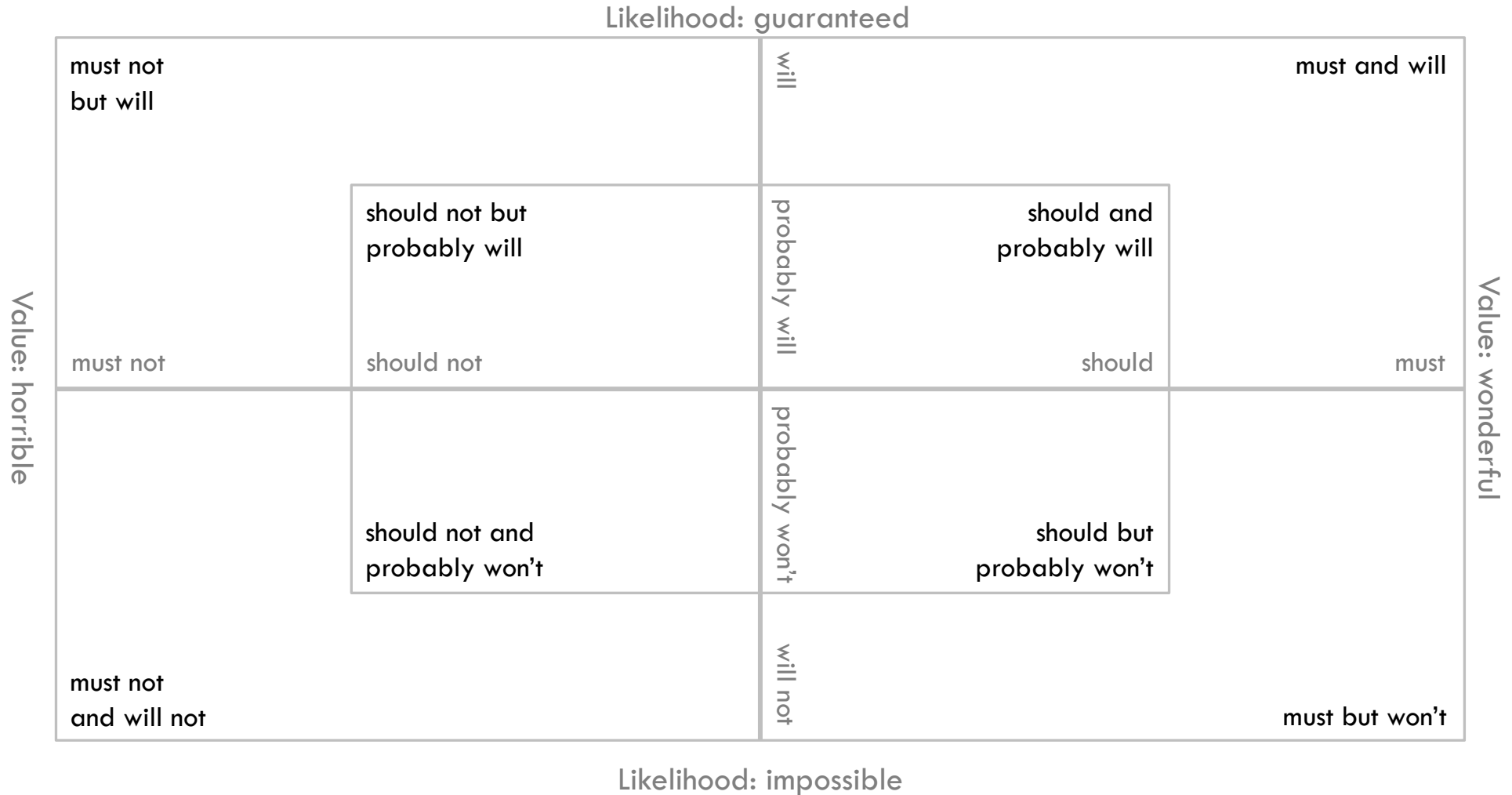
Online: Use (and record) breakout rooms for small groups.

LOCAL FOLK TALES FOR SENSEMAKING PREPARATION

2+ people, 90+ minutes.

In person: Write or print this diagram on sheets of paper, letter-sized or poster-sized. Make enough so that each small group can have their own copy.

Online: Prepare one shared whiteboard surface with this diagram on it for each small group. Make sure it's big enough to fit lots of "sticky notes" on it.



LOCAL FOLK TALES FOR SENSEMAKING

5 minutes	Facilitator	Introduce the topic and the exercise.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each.
1	Facilitator	Hand each group a full deck of story cards.
30+	Small groups	Read the stories , separately or together, silently or aloud. As you read each story, write its name on a sticky note, then place the note into the space where it belongs. If you can't decide or agree on where a story belongs, write its name down twice, and put it in two places, writing on each note why you are putting it there. Keep doing this until you have gone through all of the stories.
30+	Small groups	Stand back and look at the patterns you have created. Do you see clusters of stories? Do they have common themes ? Are there gaps where there are no stories? What does that mean? Are there boundaries between different groups of stories? Are stories far apart in the space linked in some other way? Annotate your space to record what you see.
20+	Everyone together	If you have multiple groups, show each other your spaces. Talk about similarities and differences in how you placed the stories and what you think the placements mean.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Online: Use (and record) breakout rooms for small groups.

TIMELINE WITH ALTERNATIVES FOR SENSEMAKING – PART 1

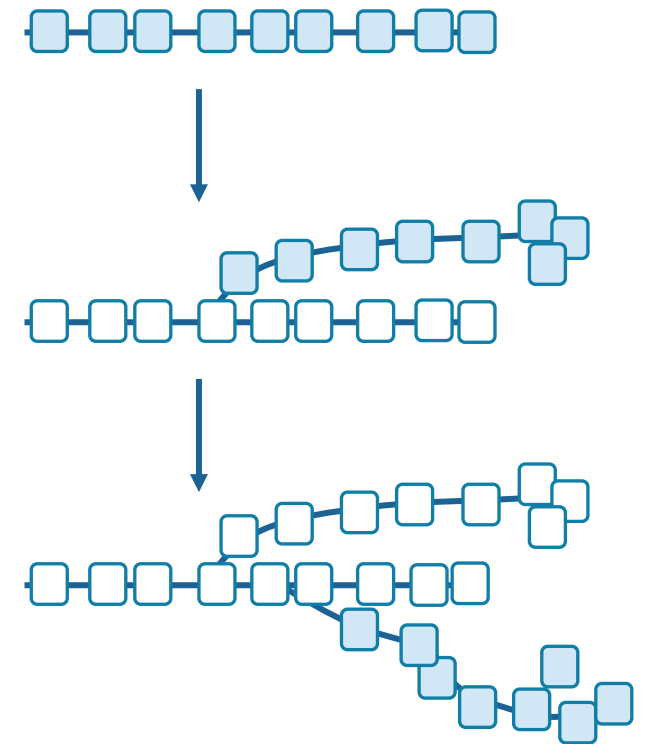
2+ people, 2.5+ hours.

5 minutes	Facilitator	Introduce the project, the topic, the stories, and the exercise.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Hand each group a full deck of story cards.
5	Small groups	Mark a horizontal line on a wall, table, or giant piece of paper. Place the start and end labels (those given to you by the facilitator or those you came up with yourselves) on either end of the line.
25+	Small groups	Read the stories , separately or together, silently or aloud. As you read each story, write its name on a sticky note and place the note on the timeline where it belongs.
20+	Small groups	When you have finished placing all of your stories onto your timeline, look at the patterns they form. Where do you see clusters? Gaps? Turning points? Links between stories? Do any stories seem out of place ?
5	Facilitator	Now would be a good time for a short break .

See the next page for the rest of the exercise...

TIMELINE WITH ALTERNATIVES FOR SENSEMAKING — PART 2

20+	Small groups	Describe a future state of affairs (in relation to your topic) that is ideal , perfect, utopian. Place some sticky notes above and to the right of your previous timeline to represent that perfect future state. Then, working backwards, create a fictional timeline that meets up with reality somewhere in the past. Describe each intermediate situation with a sticky note, as if it was a real story. (If you want to, you can connect to multiple points on the real timeline.)
20+	Small groups	Now do the same thing again, only this time, start in the lower right with an impossibly dystopian , horrible future. Again work backward, and again connect your fictional timeline to some point in your real timeline.
20+	Small groups	When all three timelines are complete, talk about what they mean. What have you learned from the three larger stories you told?
20+	Everyone together	If you have more than one group, each group, explain the patterns on your timeline. You were working with the same stories, but you might have arranged them differently. Talk about that.
10	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.



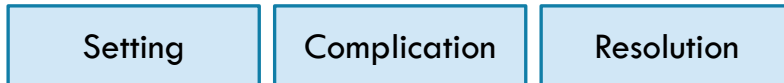
Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use breakout rooms for small groups.

COMPOSITE STORIES

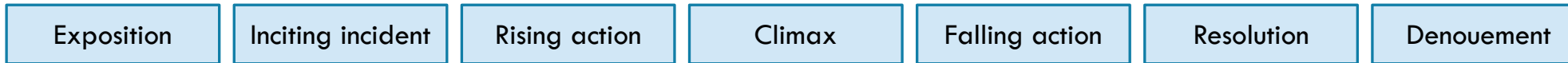
PREPARATION

9+ people, 3+ hours. Before the workshop, choose one or more story templates. (For details see Appendix A of *Working with Stories*.)

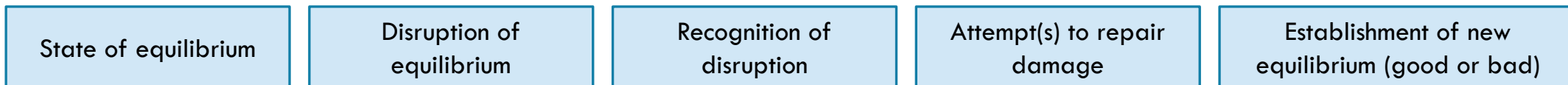
Aristotle's plot points



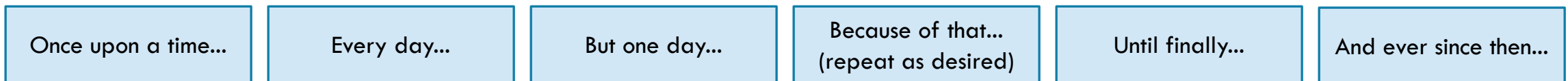
Freytag's pyramid



Todorov's narrative theory



Adams' story spine



Budrys' seven point plot structure



COMPOSITE STORIES — PART 1

5 minutes	Facilitator	Introduce the topic and the exercise.
2	Facilitator	Divide participants into at least 3 groups with 3-5 people each . Give each group a wall, table, or giant piece of paper to put sticky notes on.
1	Facilitator	Hand each group a full deck of story cards.
5	Small groups	Agree on a message you want your composite story to deliver. It should be related to the topic and goals of the project.
1 or 5	Facilitator or small groups	Facilitator: Explain the template. Or, small groups: Choose a template. In either case, write a sticky note label for each template slot . Place the labels, spaced out, on a wall or table.
15+	Small groups	Looking through the deck of story cards, choose 2-3 stories that fit into each slot of the template. What does it mean for a story to “fit into” a slot? It means the characteristics of the slot (what it is about, what it is like) are dominant or memorable in the story. Place your chosen stories on the table or wall near the label for each slot.
25+	Small groups	Now merge your chosen stories into one coherent fictional story that delivers the message you chose at the start. If you need to change which stories are in each slot, go ahead and do that. Choose one person to be the storyteller for the group. They will tell the story to the other groups. Practice telling the story at least once within the group. Keep the story short: it should take no more than 7 or 8 minutes to tell.
5	Facilitator	Now would be a good time for a short break .

See the next page for part 2...

COMPOSITE STORIES — PART 2

15+	Everyone together	<p>Storytellers, visit another group. Tell them your composite story. Everyone else, listen to the story and don't interrupt. Afterward, answer these questions:</p> <ol style="list-style-type: none"> 1. What did you take away from this story? 2. What does it mean to you? 3. How do you feel about it? <p>Storytellers, listen to the answers. Take notes if you want to.</p>
15+	Small groups	<p>Storytellers, come back to your group and tell them what the other group said. As a group, talk about what happened. How well did your story deliver your message? See if you can improve it. If you want to, replace one of the nested stories with another story that works better. Practice telling the story again.</p>
15+	Everyone together	<p>Storytellers, visit the other group, the one you didn't visit before. Tell your improved story. Everyone else, listen, then answer the same questions again.</p>
10+	Small groups	<p>Storytellers, report back on what the other group said. Talk about it. See if you want to make any more tweaks to the story. What could you do to deliver your message even more clearly?</p>
5	Facilitator	<p>Now would be a good time for a second short break.</p>

See the next page for part 3...

COMPOSITE STORIES — PART 3

10+	Small groups	Talk about what happened . How did your composite story change from the beginning of the exercise to the end? What did you learn in the process: about the collected stories, your topic, and yourselves?
20+	Everyone together	Talk about all the stories . Talk about patterns that appeared across stories. Were any of the stories similar? Did the stories present different perspectives on the topic? What did you learn from the exercise?
10+	Small groups	Meet one more time to discuss how the story should change to be told outside the workshop, to the whole community or organization.
20+	Everyone together	If participants are willing, ask each storyteller to tell their story one more time for the workshop record.

Online: Use an online whiteboard to put “sticky notes” on a “wall.” Use breakout rooms for small groups.

USING CATALYTIC MATERIAL IN SENSEMAKING

How do you use catalytic material in a sensemaking session?

Are people supposed to just read this stuff?

What if they don't understand it?

What if it's boring? What if they ignore it?

How can I make the best use of what I have created?

MANAGING INTERACTIONS WITH CATALYTIC MATERIAL

When you ask people to engage with catalytic material, **how you present the material** will affect how they use it.



Introduce stories **before** patterns.

- Contact with stories should always precede contact with patterns. Otherwise, your participants will not understand that the patterns they are looking at came from **real stories told by real people**.



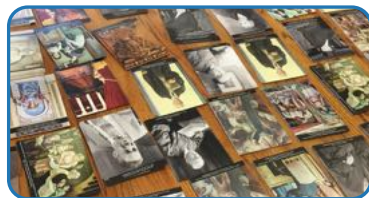
Encourage **activity**.

- Never ask your participants to just sit and read your catalysis materials. Always **give them something to do** with the materials.



Focus on the **concrete**.

- Never ask people to use catalytic materials on their own, without stories. If you do, they will stay at the abstract level of opinions and arguments. Instead, **keep moving the focus** of the activity back to the level of concrete experience.



Make story subsets **easy** to find.

- Present your catalytic materials alongside story cards with answers people can use to quickly pull out subsets. Test your story card design to **minimize the time** it takes to find stories with particular sets of answers.

MANAGING INTERACTIONS AMONG PEOPLE USING CATALYTIC MATERIAL

When you ask people to engage with catalytic material, **how you ask them to interact with each other** during that time will affect how they use the material.



Provide **group time and alone time**.

People need **groups** to bounce ideas off each other, but they also need **alone time** to save face as they make sense of the stories and catalytic materials. Plan these times into your session agenda. If you think people will be wary or intimidated, plan extra alone time. If you think people will be bored or distracted, plan less alone time.



Suggest **complementary roles**.

Encourage group members to take on roles that **suit their unique interests and abilities**. For example, one person might pore over graphs, another might pull out story subsets, and a third might read stories. Don't force people into specific roles; that tends to backfire. But do mention that complementary roles can help groups accomplish tasks (and then let each group work out the details themselves).



Provide an **audience**.

Have each group **present** what they find to the whole room. This motivates groups to find insights and to draw their insights together into a coherent presentation. You can also give groups the opportunity to **record** their presentations (in written, audio, or video format) to be communicated to people outside the session.

SENSEMAKING WITH CATALYTIC MATERIAL

A SIMPLE CONTACT TASK

2+ people, 90+ minutes. Use this simple task to help your participants make sense of your catalysis materials. **Must be preceded by a story contact task.**

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. (Minimum of 3 if sharing stories.)
1	Facilitator	Give each group a full set of catalysis materials and story cards. Explain where the materials came from.
5+	Everyone separately	Look over the catalysis materials. Choose one cluster of observations or interpretations that seems interesting to you. Within that cluster, choose one observation or interpretation you would like to think about.
10+	Small groups	Tell each other which cluster and which observation or interpretation you chose. Say why you think it is interesting. Together agree on one observation or interpretation to explore more fully.
20+	Small groups	Use your story cards to pull out 2-3 subsets of story cards (adding up to at least 20 stories in total) related to the chosen observation or interpretation.
20+	Small groups	Review and discuss the selected stories. What do you notice about them? What do they say to you about the observation or interpretation?
20+	Small groups	Optionally, share stories from your own experiences related to the observation or interpretation you are exploring. Or choose a second observation or interpretation and explore it in the same way as the first.
5	Small groups	Decide together what you want to tell everyone else about what you explored.
15+	Everyone together	Someone (anyone) from each group, explain what you discussed and discovered.
10+	Everyone together	Talk about what just happened: what surprised you, what you learned, what you are curious about.

SENSEMAKING WITH CATALYTIC MATERIAL

INTERMINGLING — PART 1

2+ people, 3+ hours. Use this exercise to help your participants dive deep into your catalysis materials. **Must be preceded by a story contact task.**

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 2-4 people each. (Minimum of 3 if sharing stories.)
1	Facilitator	Give each group a full set of catalysis materials and story cards. Explain where the materials came from.
10	Everyone separately	Look over the catalysis materials. Choose one cluster of observations or interpretations that seems interesting to you. Within that cluster, choose one observation or interpretation you would like to think about.
10	Small groups	Tell each other which cluster and which observation or interpretation you chose. Say why you think it is interesting. Together agree on one observation or interpretation to explore more fully.
20+	Small groups	Pull out 2-4 subsets of story cards (with at least 20 stories in each) related to the chosen observation or interpretation. Copy the names of the selected stories onto sticky notes, using a different color for each subset . If the chosen subsets are too small, choose another pattern to explore, or use the next (optional) step to add more stories.
20+	Small groups	Optionally, each person, choose one of the selected stories that resonates with you. Pair it with a story from your own experience. Give each new story a name. Answer the question(s) connected to the observation or interpretation you are exploring for the new story. If your answer(s) would place the story into any of the subsets you have pulled out, write its name on the same color of sticky note as you are using for that subset. Then circle or underline the name to indicate that it is a new story.
5	Facilitator	Now would be a good time for a short break.

See the next page for the rest...

SENSEMAKING WITH CATALYTIC MATERIAL

INTERMINGLING — PART 2

Continuing...

5+	Facilitator	Introduce a sensemaking exercise in which story subsets can be intermingled (e.g., landscape, timeline, local folk tales). If the exercise has named dimensions, ask groups to come up with their own dimensions, and help them check that the dimensions are (a) relevant to the project, (b) relevant to the stories, and (c) independent of each other.
90+	Small groups	Go through the exercise using your sticky notes (including any related new stories). Use the color dimension to explore patterns among the subsets. Discuss what you discovered.
20+	Small groups	Use what you discovered in the story-based exercise to annotate or rewrite the observation or interpretation in a way that more fully captures the meaning in the stories and in your discussion.
10+	Everyone together	Someone (anyone) from each group, explain what you discovered, discussed, and wrote.
5+	Everyone together	Talk about what just happened: what surprised you, what you learned, what you are curious about.

SENSEMAKING WITH CATALYTIC MATERIAL

JUXAPOSITION — PART 1

4+ people, 3+ hours. Use this exercise to help your participants dive deep into your catalysis materials. **Must be preceded by a story contact task.**

2 minutes	Facilitator	Explain briefly what people are about to do.
2	Facilitator	If there are more than 5 people, set up small groups of 2-5 people each. (Minimum of 3 if sharing stories.)
1	Facilitator	Give each group a full set of catalysis materials and story cards. Explain where the materials came from.
10	Everyone separately	Look over the catalysis materials. Choose one cluster of observations or interpretations that seems interesting to you. Within that cluster, choose one observation or interpretation you would like to think about.
10	Small groups	Tell each other which cluster and which observation or interpretation you chose. Say why you think it is interesting. Together agree on one observation or interpretation to explore more fully.
20+	Small groups	Pull out two subsets of story cards (with at least 30 stories in each) related to the chosen observation or interpretation. Copy the names of the selected stories onto sticky notes. Keep the two sets of notes separate. If the chosen subsets are too small, choose another pattern to explore, or use the next (optional) step to add more stories.
20+	Small groups	Optionally, each person, choose one of the selected stories that resonates with you. Pair it with a story from your own experience. Give each new story a name. Answer the question(s) connected to the observation or interpretation you are exploring for the new story. If your answer(s) would place the story into either of the subsets you have pulled out, place it with the stories in that subset. Circle or underline the name to indicate that it is a new story.
5	Facilitator	Now would be a good time for a short break.

See the next page for the rest...

SENSEMAKING WITH CATALYTIC MATERIAL

JUXAPOSITION — PART 2

Continuing...

2 minutes	Facilitator	Ask each group of four to split into two groups of two .
5+	Facilitator	Introduce a sensemaking exercise . Ask each group to choose one subset of stories to work with. If the exercise has named dimensions, ask groups to come up with their own dimensions, and help them check that the dimensions are (a) relevant to the project, (b) relevant to the stories, and (c) independent of each other.
60+	Very small groups	Go through the exercise using your one subset of sticky notes (including any related new stories). If you want to add any stories that come to mind as you consider only this subset of stories (and there is time for it), go ahead and do that.
2	Facilitator	Ask each group of four to come back together .
20+	Small groups	Show each other what you discovered. Compare your two outcomes. Talk about what it means.
15+	Small groups	Use what you discovered in the story-based exercise to annotate or rewrite the observation or interpretation in a way that more fully captures the meaning in the stories and in your discussion.
10+	Everyone together	Someone (anyone) from each group, explain what you discovered, discussed, and wrote.
5+	Everyone together	Talk about what just happened: what surprised you, what you learned, what you are curious about.

IMAGE CREDITS

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Team [https://commons.wikimedia.org/wiki/File:Children_working_together_at_school_\(4843331570\).jpg](https://commons.wikimedia.org/wiki/File:Children_working_together_at_school_(4843331570).jpg)

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CHAPTER EIGHT: INTERVENTION AND RETURN

This chapter explains the processes of intervention and return in the PNI cycle.

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NARRATIVE INTERVENTION

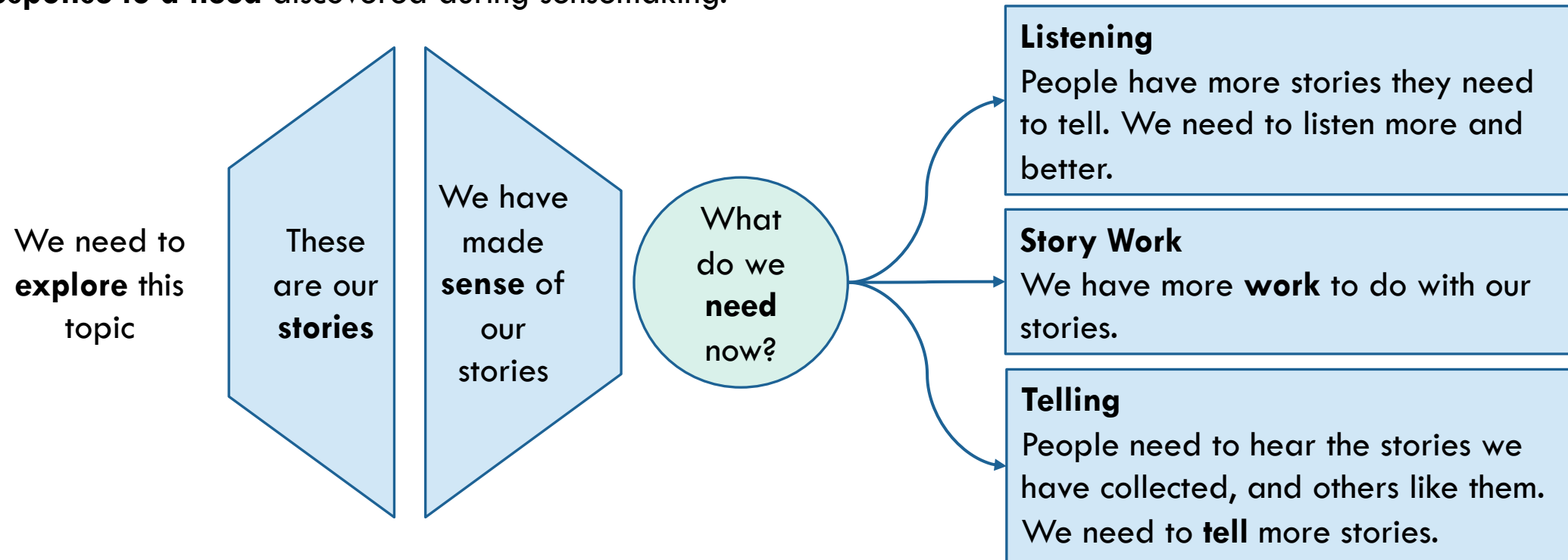
What is a narrative intervention?

Why should I do this?

How do I go about doing it?

WHAT IS NARRATIVE INTERVENTION?

A narrative intervention is an action whose purpose is to **change the flow of stories** in a family, group, community, organization, or society. In a PNI project, a narrative intervention is typically carried out in **response to a need** discovered during sensemaking.



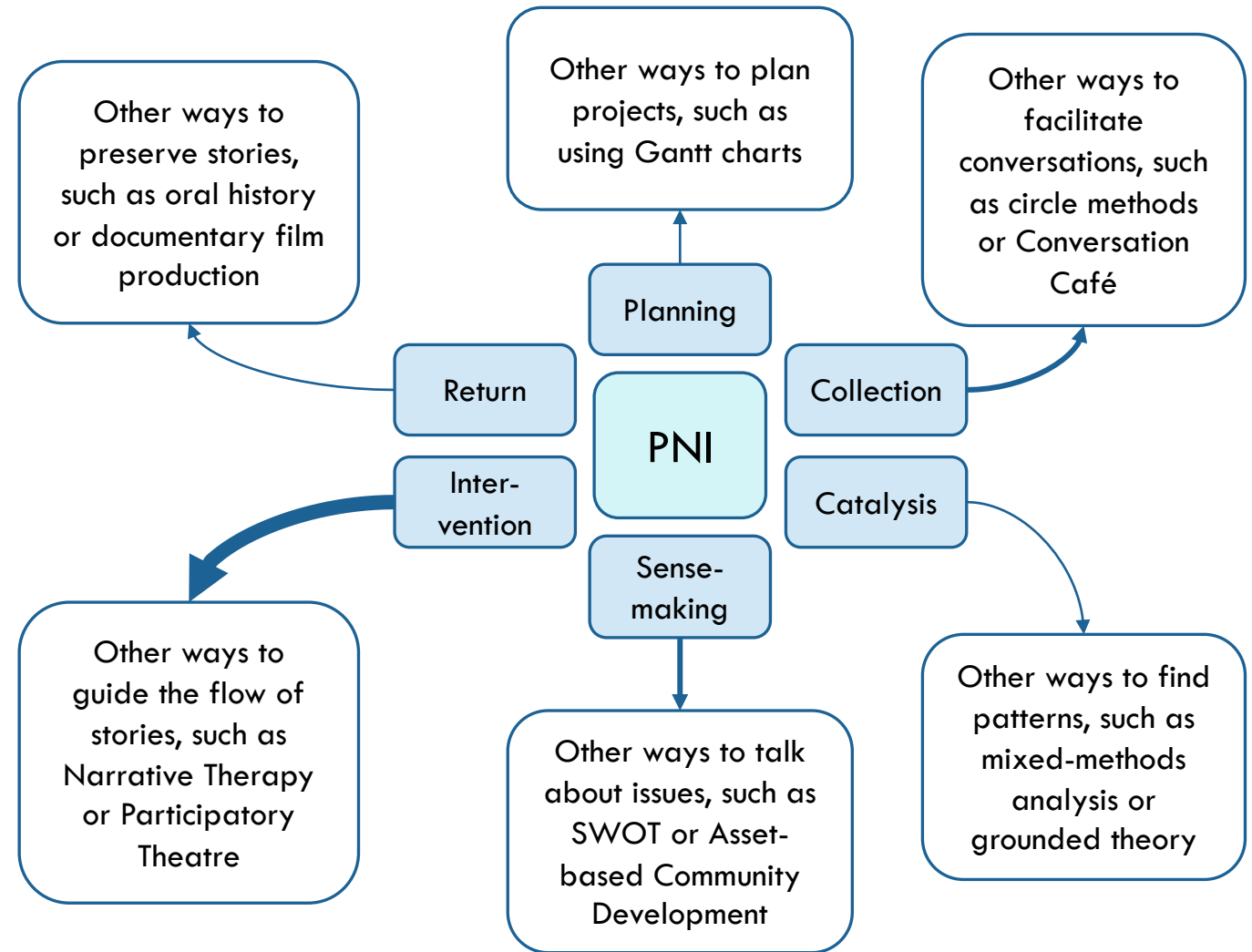
I will describe some examples of these three intervention types, but first...

INTERVENTION IS WIDE OPEN

Intervention is the most flexible and variable phase of PNI. You can **plug in** many activities, programs, and projects during this time – or not! Intervention is an **optional** part of PNI. It does not happen in every project.

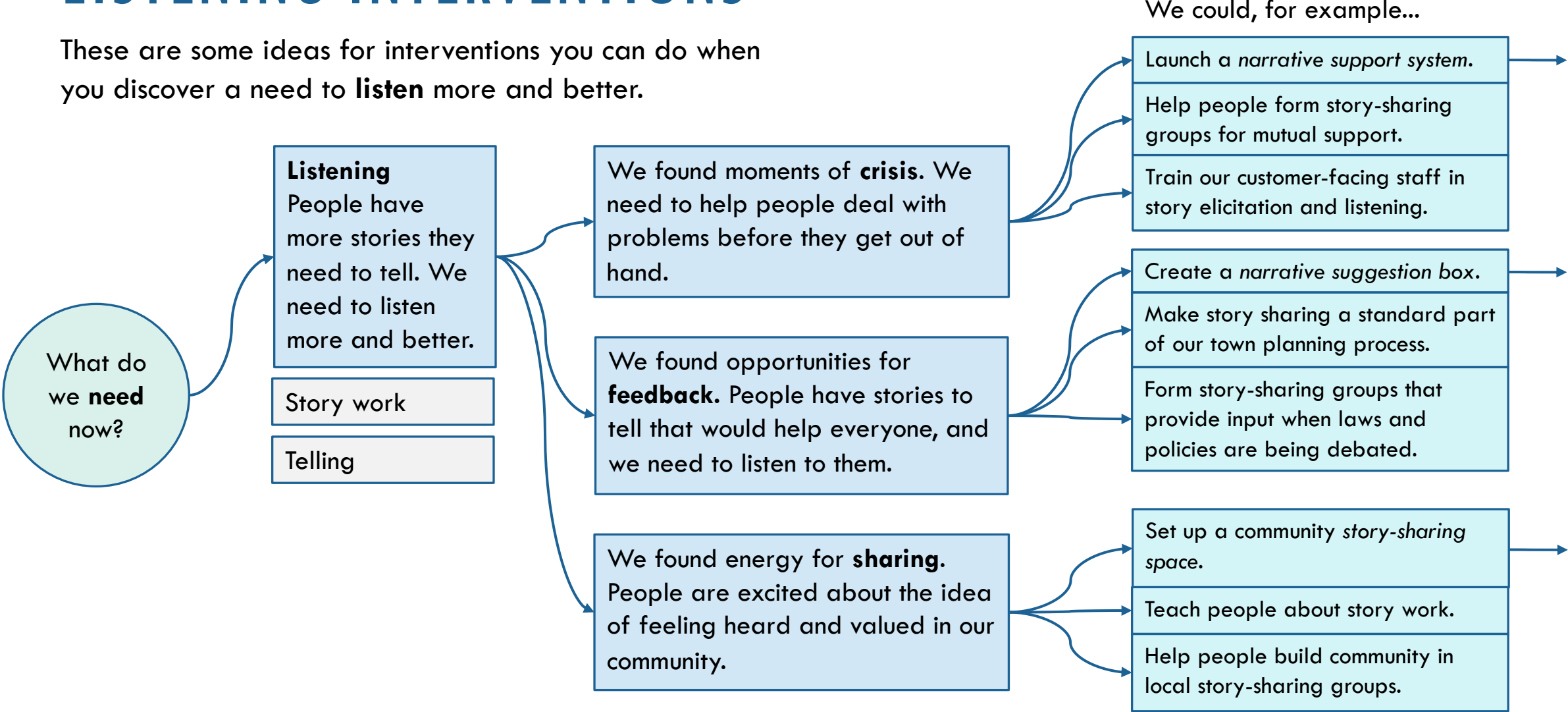
Some of the things you can plug in during the Intervention phase are **other story-based methods**. To be clear, you can connect PNI with other methods in every phase; but the Intervention phase is the most connected to other methods that also work with stories.

In this presentation I will give you a scattering of ideas and connections you can use, but there are many more to explore.



LISTENING INTERVENTIONS

These are some ideas for interventions you can do when you discover a need to **listen** more and better.

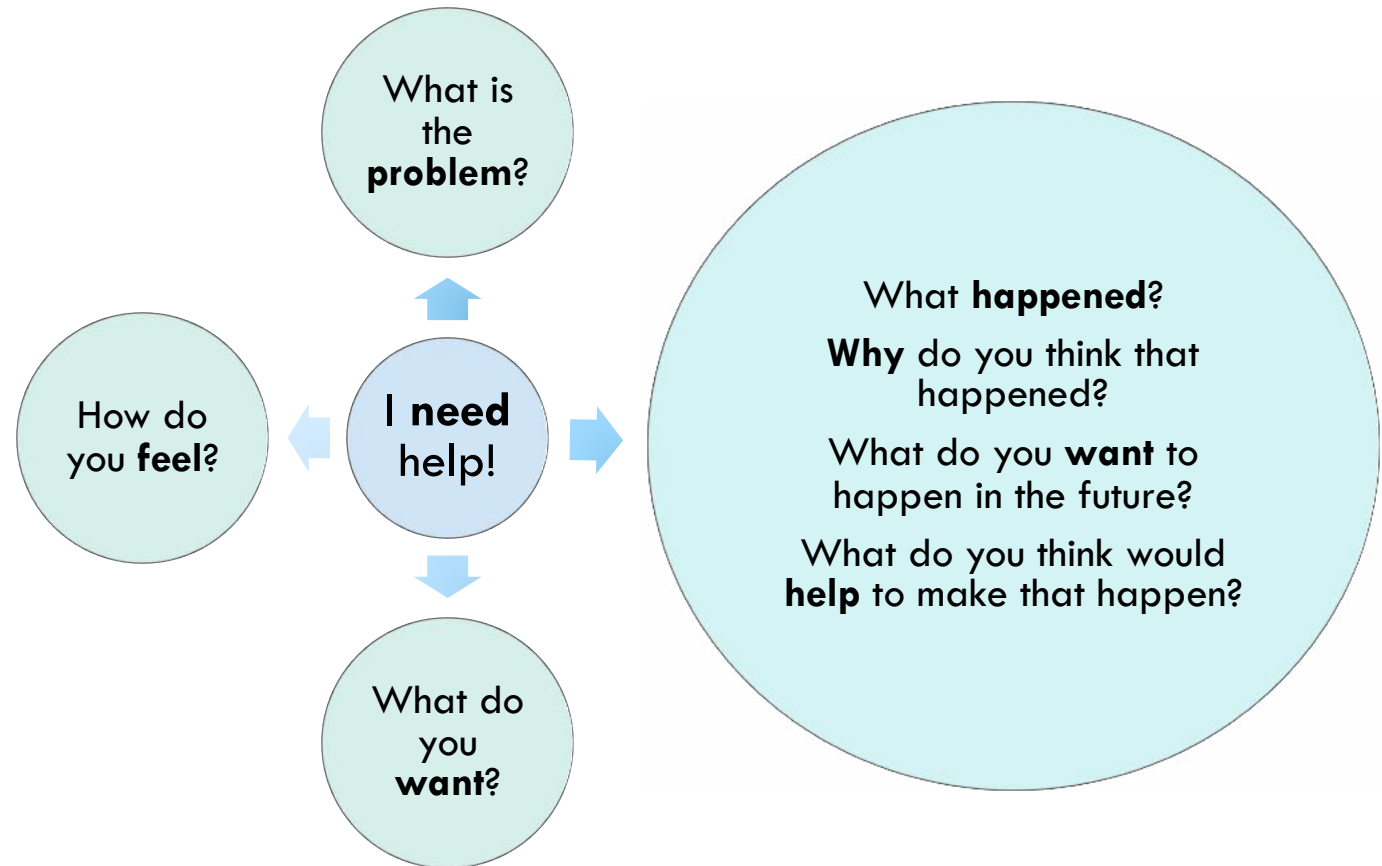


A NARRATIVE SUPPORT SYSTEM

Creating a narrative support system is a useful intervention when sensemaking reveals **unmet needs**.

When someone needs help, you are probably already asking for facts, feelings, and opinions. You can also **ask for stories**, both real and imagined. Sharing stories helps people feel **both helped and heard**.

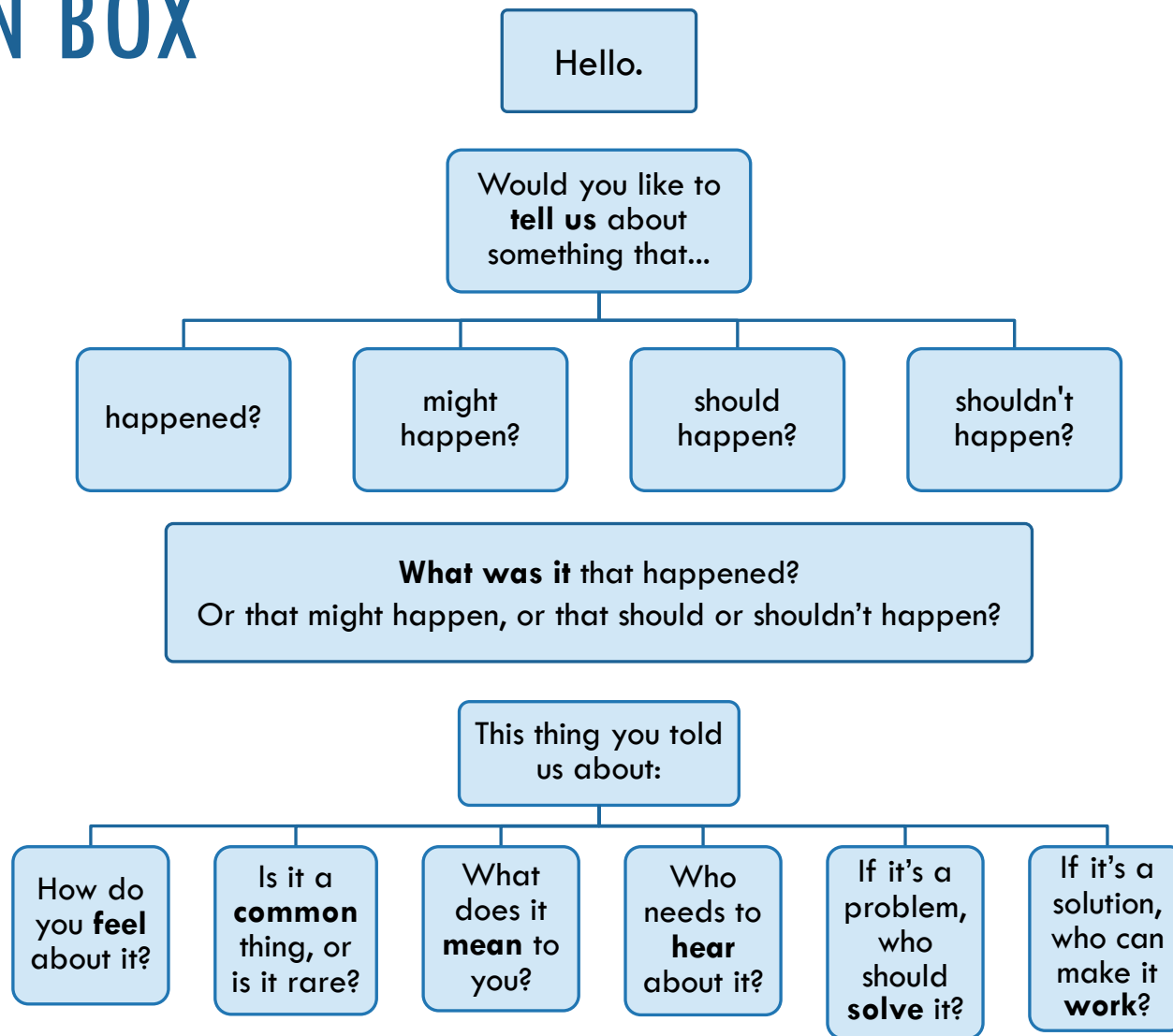
Then, with permission, you can **share the stories with others** who need help.



A NARRATIVE SUGGESTION BOX

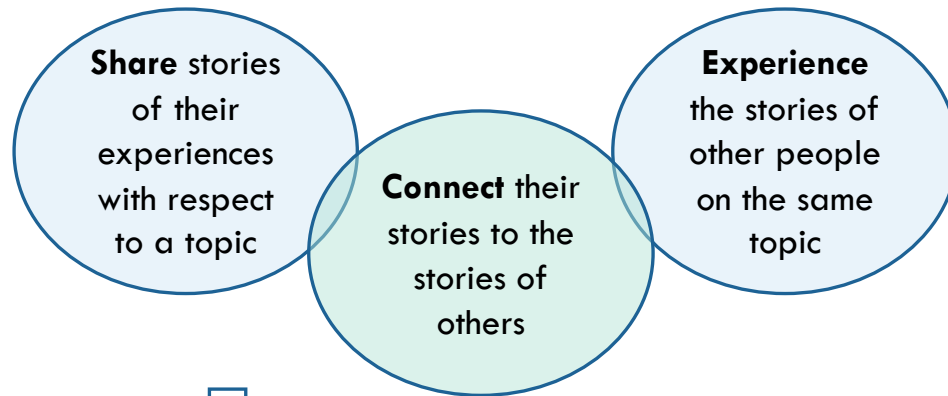
Narrative suggestion boxes are useful interventions when sensemaking reveals hints of **tensions and solutions that flow beneath the surface** of a community or organization.

If you already have a way for people to make suggestions, perhaps by soliciting opinions or requesting proposals, you can **listen more deeply** by eliciting stories during the process. Simply asking “what happened” – or “what would you like to have happen” – can be an effective intervention in the flow of stories.

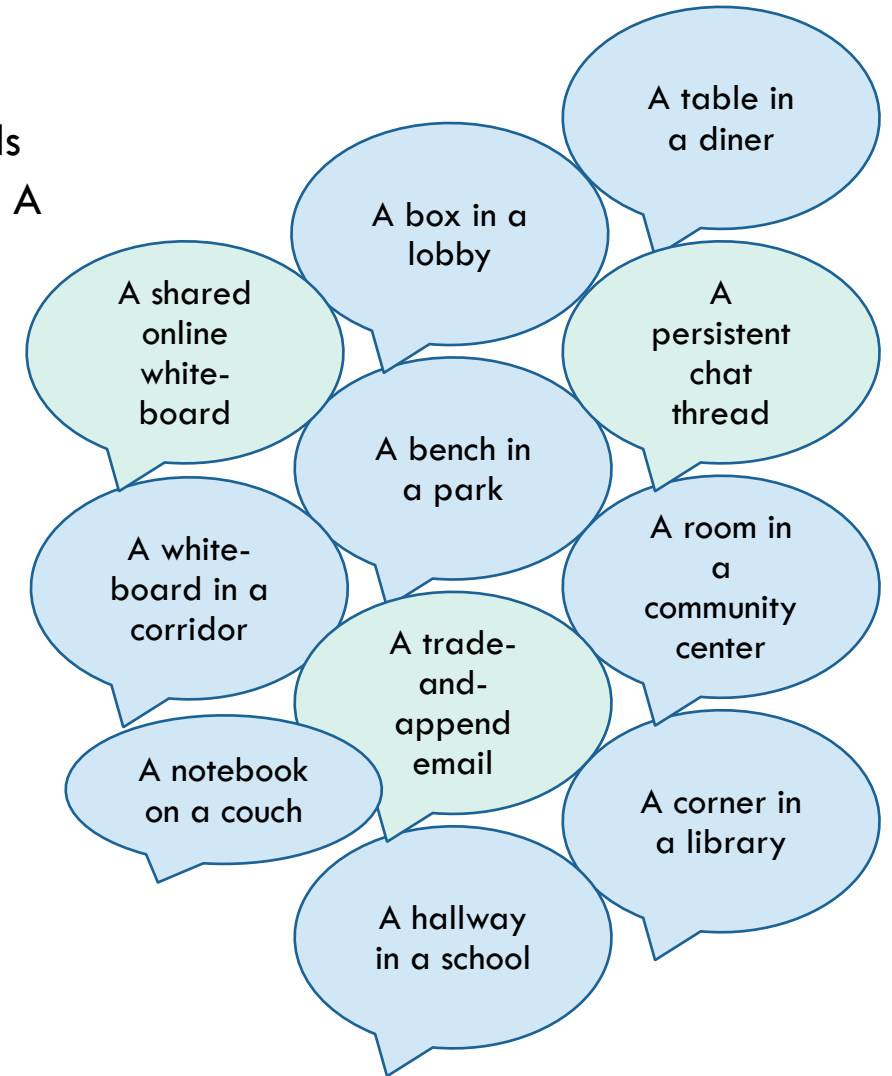


A STORY-SHARING SPACE

A story-sharing space is a useful intervention when sensemaking reveals **a need to connect** with other people in the community or organization. A story-sharing space, whether it's physical or online, gives people **permission and tools** to:

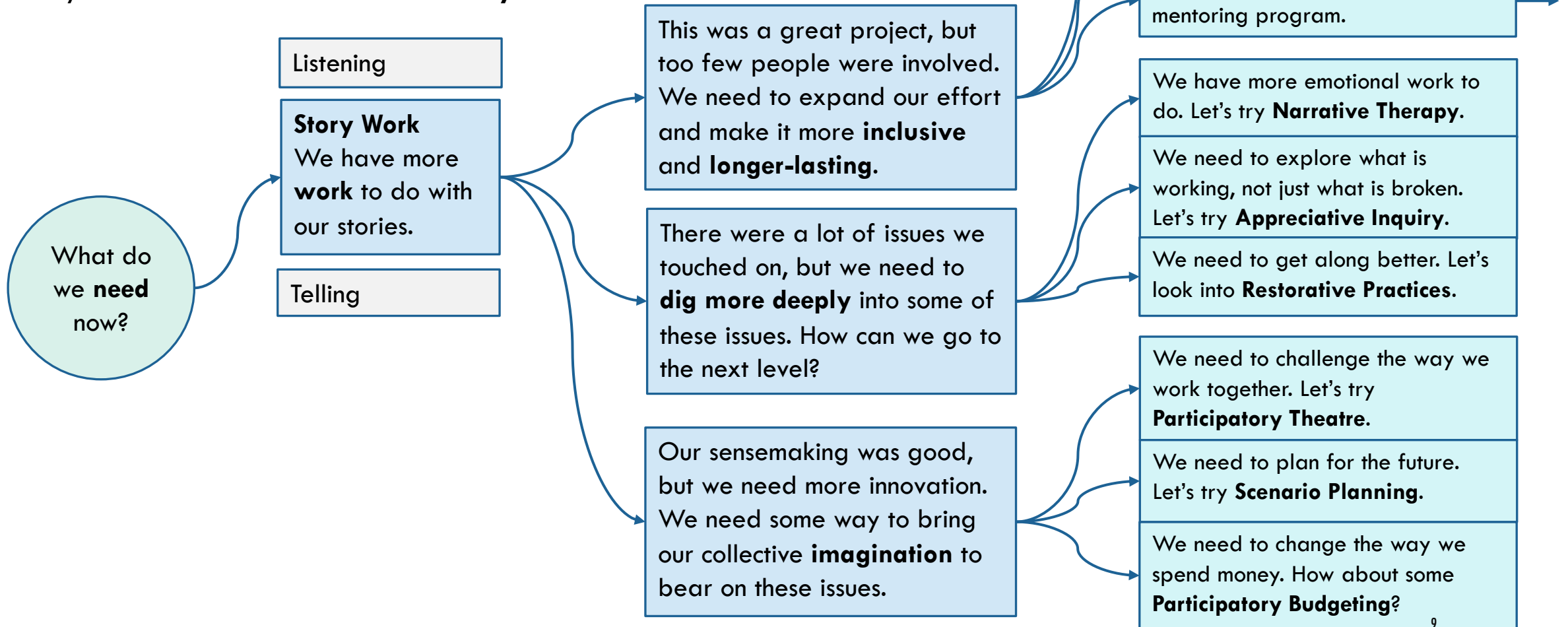


+	With	Without
	<ul style="list-style-type: none">• Responsibility• Appreciation• Curiosity	<ul style="list-style-type: none">• Judgment• Competition• Interrogation



STORY WORK INTERVENTIONS

These are some ideas for interventions you can do when you discover a need for **more story work**.

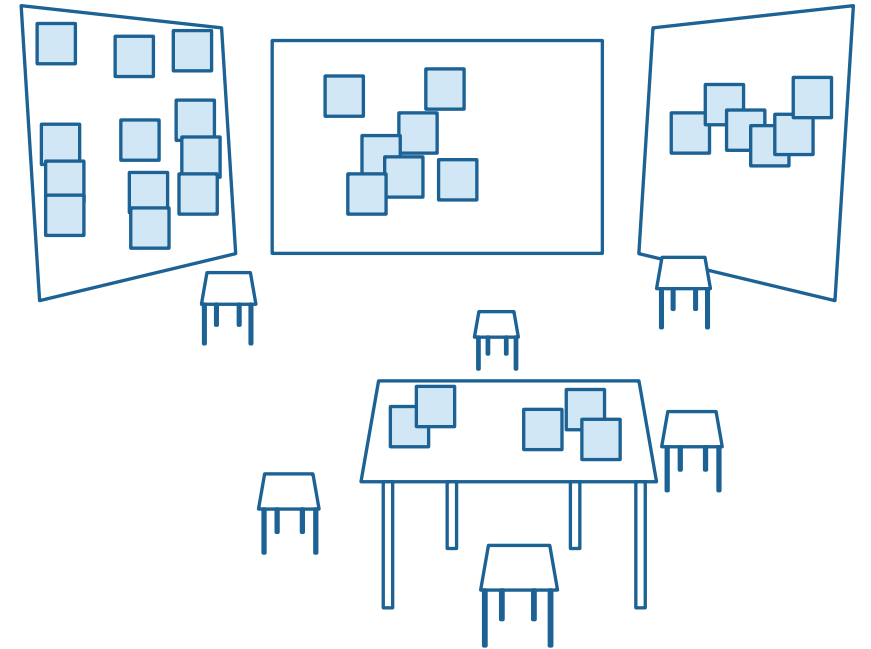


A SPACE FOR SENSEMAKING

If you have a physical place you can set aside (and watch over), you can invite people in your community or organization (individuals and small groups) to share and make sense of stories on an **ongoing** basis.

You can help people:

- **Read** or listen to the stories you have collected
- **Add** more stories to the collection, individually or in groups, by:
 - responding to questions or to stories
 - using surveys, interview scripts, or exercise instructions
- Make **sense** of the stories, individually or in groups, by:
 - looking for patterns
 - doing simple tasks – pairing, sorting, ranking, clustering
 - doing sensemaking exercises, with instructions
 - annotating and commenting
- Seek **help** as they work with stories, go through exercises, and add to the collection



Why build a sensemaking space?

- To keep the conversation going
- To involve more people
- To deal with new issues
- To orient newcomers
- To teach people about story work

A NARRATIVE MENTORING PROGRAM

Narrative mentoring is like regular mentoring – **pairing people** with much and little experience in an area – but with extra instruction and support for sharing and working with stories. Some ideas:

Encourage

Represent and celebrate story sharing as a vital part of the mentor-mentee relationship

Include attention to story sharing when evaluating mentorships

Teach

Provide simple interview **scripts** and exercise **instructions** to help mentors and mentees share stories more productively

Provide **answers** to frequently-asked questions about how and why to incorporate story sharing into a mentorship

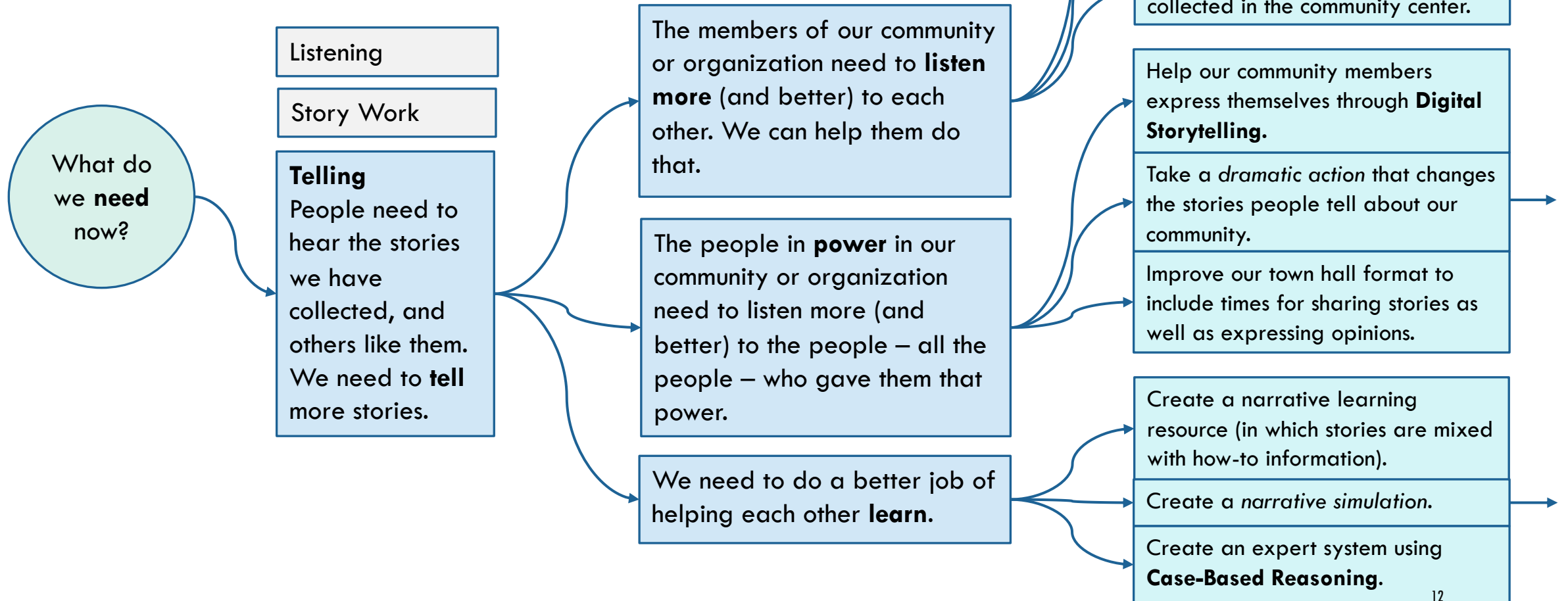
Support

Offer **facilitation** to mentors and mentees who want some help getting started sharing stories

Offer **help** to mentors and mentees who want to share stories and are having trouble getting buy-in from their partners

TELLING INTERVENTIONS

These are some ideas for interventions you can do when you discover a need to **tell** more stories.

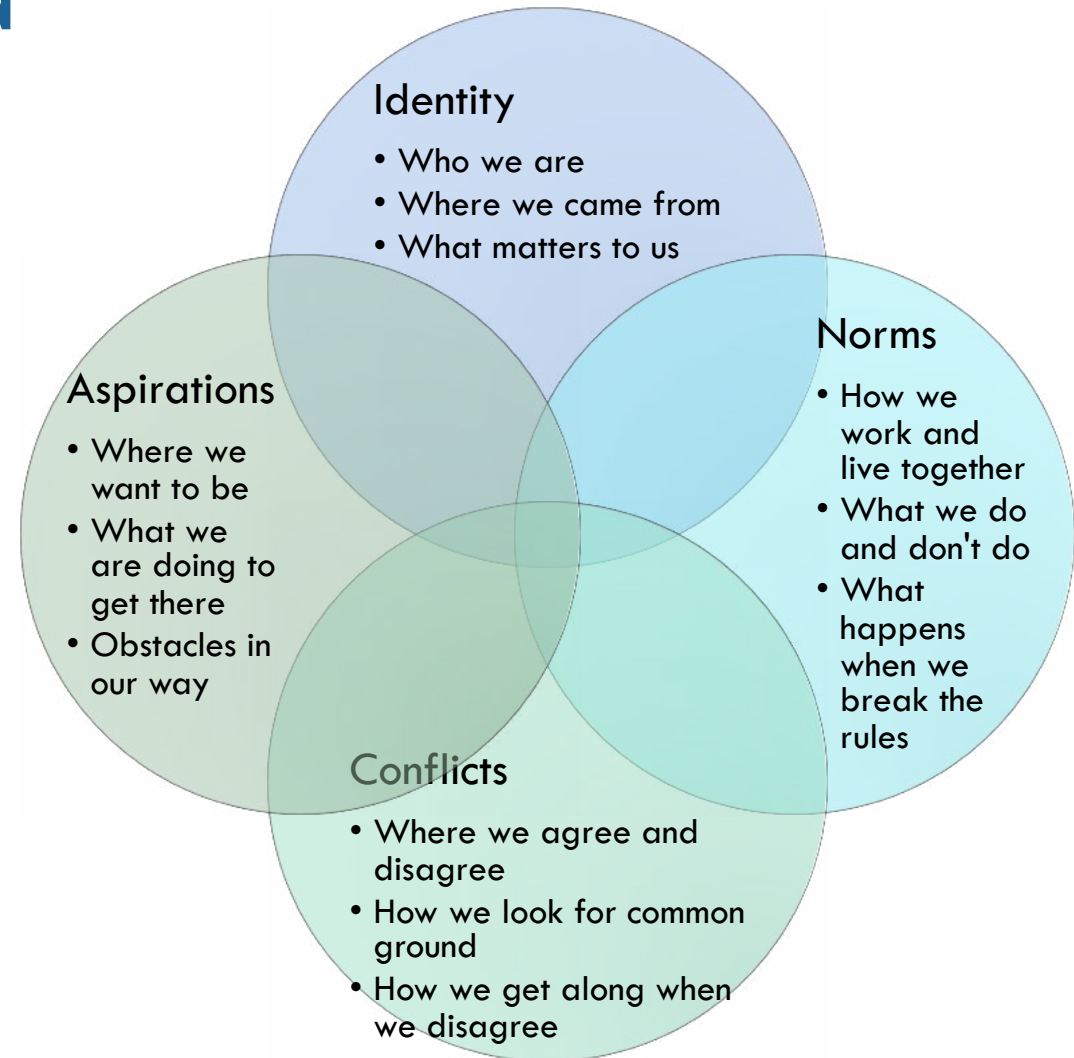


A NARRATIVE ORIENTATION

Working with the stories you have collected, you can create a story-based experience that will **welcome newcomers** and help them learn how to fit in and contribute.

Look for stories that connect well to four essential aspects of community: identity, norms, conflicts, and aspirations.

You can ask participants in your sensemaking workshops to help you find and pass on these stories to new members.

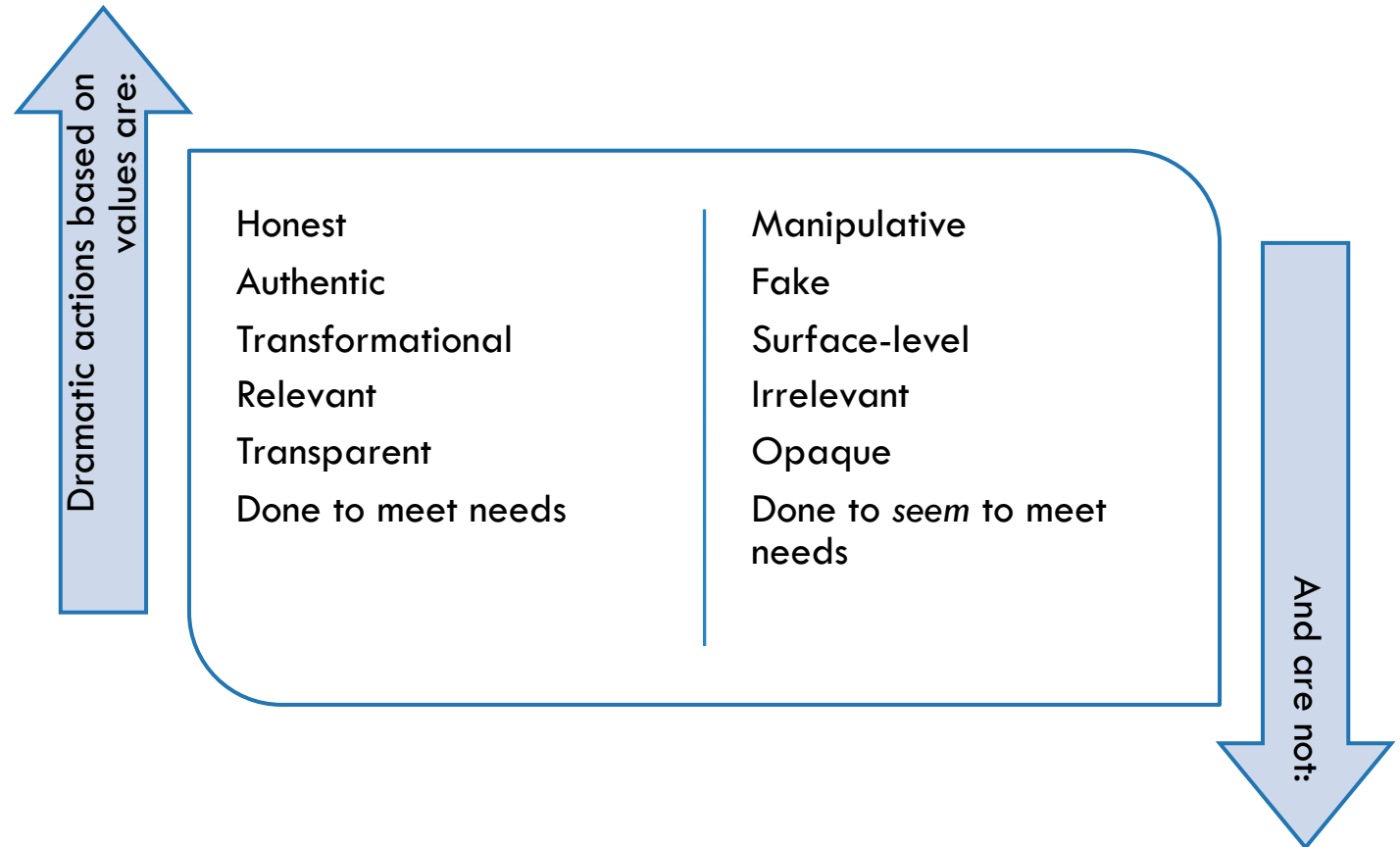


A DRAMATIC ACTION

Sometimes PNI projects uncover needs that are too deep to be addressed by any amount of talking. Only **action** will do.

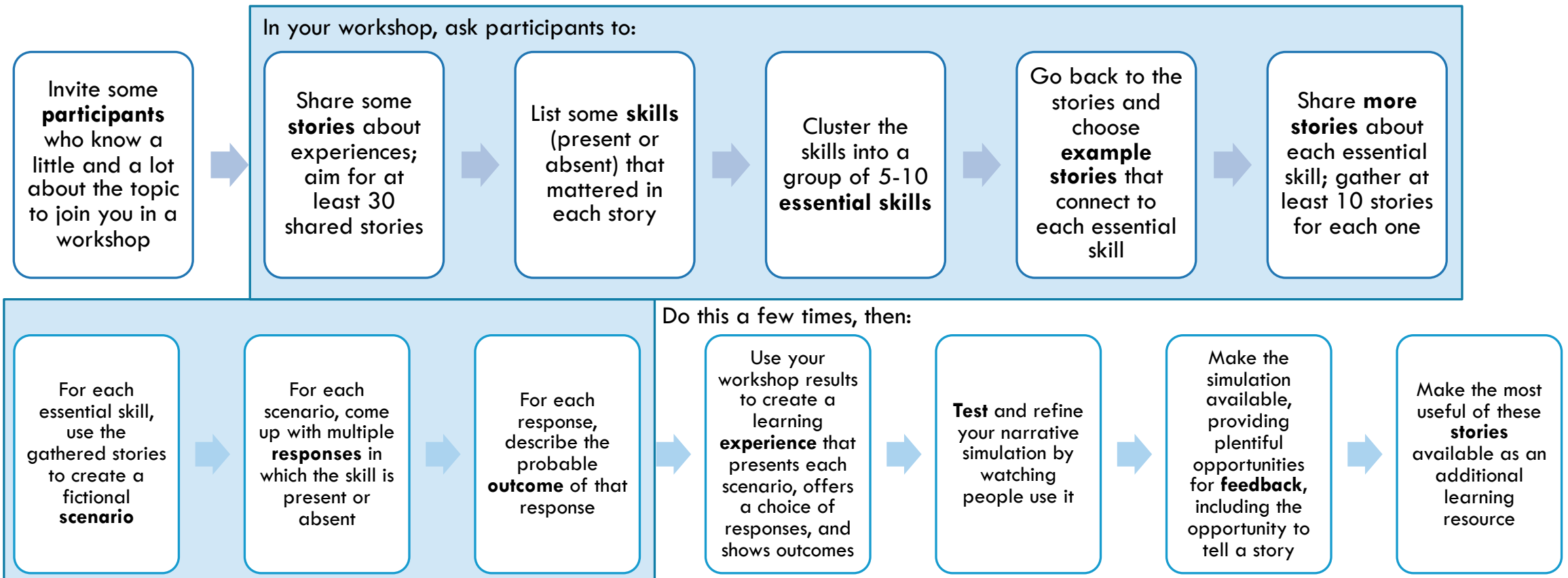
So, one way to change the stories people tell in your community or organization is by carrying out a **dramatic action** that is **based on values** important to the community or organization.

Because people are always looking for stories to share, good and bad, stories naturally gather around such actions. If the actions are based on values important to the community or organization, stories will be told about them. And if they are not, stories will be told about that.



A NARRATIVE SIMULATION

Building a narrative simulation is a useful intervention when your sensemaking has uncovered a **dangerous excess of confidence** around certain skills. When people *think* they know how to do something but don't, in a way that creates danger for themselves and others, a narrative simulation can help. Here's how to build one.



NARRATIVE RETURN

What is narrative return?

Does it matter?

How do you do it?

WHAT IS NARRATIVE RETURN?

The return phase of PNI is a lot like **follow-through** in tennis. Even though your racket is no longer touching the ball, so to speak, you need to keep your eye on what is happening as the project comes to a close.



Why?

For your community or organization:

- ✓ To keep the **promises** you made at the start of the project
- ✓ To bring **closure** to the group experience
- ✓ To make sure everyone has been **heard**
- ✓ To **leverage** the insights and ideas that arose
- ✓ To mitigate the **risk** of anyone not getting what they wanted (especially whoever helped you make the project happen)

For yourself:

- ✓ To **learn** from what happened
- ✓ To create a **record** you can come back to later
- ✓ To develop your PNI **practice**

SUPPORTING RETURN FOR YOUR COMMUNITY

During your project, you asked people to do things: tell stories, read stories, talk about stories. In the return phase, people will ask you to do things. Prepare to **respond to requests**, either as they come up or in anticipation.

I want to stay **informed** about this project. Is there a final report or something I can look at?

Yes. Here is our project **summary**. It has links to more detailed information if you want it.

I liked reading the **stories**. Are there any more?

Here are all of the **stories** we collected.

I am very interested in this topic. I would like to **explore** the stories and other information you collected. All of it, if possible.

That's great! Here's an **archive** of the whole project. I'd be glad to answer any questions you have about it.

I'm not happy with how this project went. Where can I **complain**?

I am eager to **hear** anything you have to say about the project. When can you talk?

This was great! I want to keep the conversation **going**. How can I help that happen?

Here are some **ideas** for supporting story sharing in our community. I'd be happy to talk about them with you.

I want to do projects like this **myself**. How do you do this?

Here are some **pointers** to information that will get you started. And I'd be glad to **answer** your questions.

SUPPORTING RETURN FOR YOUR SPONSORS

PNI projects often have **sponsors** of some kind, either people who provided financial support or people who got to say whether the project could happen. In the return phase, you must prepare to **prove the value of the project** to its sponsors. Even if that's *you*, it is still a good idea to convince yourself that the project had value.

So what did you actually **do** in this project?

This is the detailed **story** of the project as it played out.

What kinds of **stories** did you get?

Here are some of the **stories** that had the biggest impact on the project.

What **conclusions** did you draw? What are your **findings**?

This is **what happened** in our sensemaking sessions. These are the things people **talked** about and **built**.

What was the **outcome**?
What are your recommendations?

In our sensemaking workshops, we asked people to list their **discoveries, surprises, and ideas**. Here is what they said.

Did the project **succeed**?
Was it worth doing?

Here is some of the **feedback** we collected on the project.

I have **questions** for you.

I'm ready to **answer** them.

Can I see **everything**?

Here is an **archive** of the entire project.

SUPPORTING RETURN FOR YOU

Supporting return **for yourself** is the easiest part of PNI to ignore – and the most dangerous. To succeed with PNI, you need to make sense of what happened in each project so you can do an even better job the next time.

We **did** it! It was hard, and we made plenty of mistakes. But we did it.

Let's **celebrate**! Sure, things might not have gone exactly the way we wanted them to, but we did pretty well.

What **really happened** in the project? What was it like for everyone else? Are there perspectives on the project we have not heard?

Let's **ask** our participants about the project. Let's ask what surprised them, what mattered to them, and what they wish had happened. And let's ask people who weren't involved. What would *they* say about it?

What did we **learn** about our community or organization? What about our own strengths and weaknesses?

Let's have an **after-party** for the whole project. We'll sit around and talk about the moments we remember and what they mean to us.

What did we learn about stories, facilitation, and PNI? How do we want to **improve** our PNI practice?

Let's **pretend-plan** our next project. What will we want to keep the same? What will we want to do differently?

(Years **later**) What did we do in this project?

Here is an **archive** of the entire project.

IMAGE CREDITS

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Tennis player https://www.flickr.com/photos/bcb_nj/29610098103/