Use of Consent Forms in Collecting Stories

Many organizations choose to integrate a consent form into their storytelling efforts, especially when an individual’s story will be highlighted in the media, with policymakers, or through public education.

The consent form serves two purposes:

1. It helps protect your organization against any claims against it.
2. It solidifies an individual’s involvement with your story bank efforts.

Some people may think that a consent form is unnecessary, but failing to provide people with the details of participation could have serious implications for your organization. It’s crucial that you carefully and explicitly lay out exactly what people are agreeing to and what they can expect after agreeing to share their story publicly. If you fail to communicate with your storytellers, they may feel confused, upset, or violated later in the process. Plus, you could leave your organization vulnerable.

Let’s look at a few examples of what can happen if you fail to provide your storyteller with a consent form:

Susan is very interested in showing the successes of an event that her organization is co-hosting. She takes photos of people who are lining up to receive blood pressure tests and posts them on the organization’s Twitter account with a quote. A woman named Nancy agrees to have her photo taken. Later, Nancy calls the organization upset that her name, photo, and quote appeared in promotional materials without her permission.

Joe shares his story and contact information on XYZ’s website. In his submission, he discloses details about a medical condition. A couple weeks later, organization QRS phones him. Joe has never heard of QRS and is confused as to why someone is calling him. Joe quickly learns that not only does QRS have his contact information, it also has details about his diagnosis and treatment. During the conversation, he becomes angry and expresses concern that he doesn’t know who has access to his medical information.

In both of these examples, the organization neglected to set an expectation of what would happen once the person’s photo was taken or information shared. In Susan’s case, she didn’t inform Nancy that she would be photographed or what Nancy’s photo would be used for.
For Joe, there was no mention that XYZ would share his story with a third party. If there had been, Joe would have expected the call. He may also have shared different information in his submission to XYZ. Joe’s situation is also very frightening. He has no idea what has been shared and with whom. For especially sensitive information, this could leave storytellers vulnerable. But it also places organizations in a dangerous place.

**Where does the consent form fit in the process of collecting stories?**

You should make it a general rule of thumb to ensure that storytellers sign your organization’s consent form before telling their story in a public venue. This holds true whether the individual shares his or her own story (in an interview or at a public speaking event) or you share it on the individual’s behalf (in a blog, social media post, or testimonial video).

You will need to collect consent forms before your organization can engage in storytelling opportunities, including the following:

» If your organization engages in activities to collect stories, pictures, or videos and intends to use those images on your website, on social media, or in promotional materials.

» If you are collecting someone’s story, and your organization plans to share it with another organization for them to develop the story.

» If your organization wants to release contact information to a third party (for instance, a member of the media, advocate, or policymaker) after development.

» If your organization decides to develop materials such as blogs, testimonial videos, or other projects.

There are a few natural points at which you can integrate a consent form into the process of collecting and developing stories. Some of these will occur online (through a “Terms and Conditions” acknowledgement), others on paper or electronically. In each of the above examples, you should introduce the consent form in a slightly different manner, depending on where and when you interact with the individual.

In some instances, you could introduce the consent form face to face when you are working with the individual. This is appropriate if your organization is engaging in collecting stories in person at an event, such as a health fair or convention.

Or, you could send the person a copy of the consent form to fill out. This might lend itself to someone who calls in to share her story or a submission from a partner organization.

Other times, it might make sense for you to integrate the form into a “Terms and Conditions” section of your web form. See “Website Language for Your Story Collection Form” (in: *Building an Infrastructure*) for more information.

**What should you include on the consent form?**

Any consent form that your organization uses should clearly outline what will happen if an individual decides to share his or her story with your organization and/or a third party. Depending on what your goal is for sharing the story, you can specify on your consent form what the individual is agreeing to when he or she signs the form. This could include releasing contact information or publishing and distributing materials related to the story.

If your organization anticipates that you will be sharing stories from minors, be sure to include a section for a guardian or parent to sign off.
Building an Infrastructure

Every organization’s consent form is going to be slightly different. As such, it’s important that even if an individual signs a consent form for one organization, he or she also signs one for yours. We have provided several examples of consent forms that other organizations use to demonstrate the range of forms. Before you start to circulate a consent form, you should take the time to review your proposed form with your organization’s legal counsel.

Where do you introduce the consent form in the storytelling process?

Here are three different ways to introduce a consent form, depending on where you are collecting the form and at what point in the story collection process.

1. If your consent form appears online in a “Terms and Conditions” section of a form, include a link to the details and ask people to acknowledge that they agree to the conditions before submitting their story. It could be a mandatory field for submission. Record that the individual has acknowledged receiving the “Terms and Conditions” in your database or tracking system.

2. If you collect the form in person at an event and intend to share any information collected with a third party, or to distribute anything gathered (like videos, short descriptions, or photos).

3. If you have a storytelling opportunity and you have not yet received consent through another method. This could happen if your organization received a story lead from a third party, or if the individual came by word of mouth or a referral.

Even though a consent form can be introduced to a storyteller in a variety of ways, it is important that the language used to introduce the form be clear and easy to understand. If you are introducing the form in person or on the phone, you have an opportunity to explain what providing consent entails. The person introducing the form can respond to any questions the storyteller might have. This is especially important if you are asking for consent prior to the individual sharing her story publicly.

Unfortunately, there is no way for a storyteller to ask questions about a consent form on a website. Chances are, if people have an issue with anything included in the form, they won’t submit their story. That is why it is important to make sure any “Terms and Conditions” section is easy to understand.

It may be a while between when a storyteller submits a story online (or signs a form) and when the storytelling opportunity occurs. Therefore, it’s a good idea for your organization to remind the storyteller about the consent form before an opportunity, even if you already have a form on file. An interviewer or person arranging the storytelling opportunity need only say something like, “We already have a consent form on file that authorizes us to release your name and phone number,” or “When you submitted your story online, you checked a ‘Terms and Conditions’ box that authorizes us to share your story and photo.”

Whether you collected the form when the person submitted her story or receive it immediately before a storytelling opportunity, be prepared to explain the level of visibility around sharing a story. Afterward, let the individual ask you questions. We go into more detail about how to talk about story sharing with people in “How to Pitch a Story Sharing Opportunity” (see: Disseminating Stories).
How can you collect consent forms?

You should make it a general rule of thumb to ensure that storytellers sign your organization’s consent form before any story sharing opportunity.

Introducing the consent form is not a replacement for having a conversation to explain an opportunity for someone to share his or her story. Instead, it builds upon the information shared about the request. Providing a written consent form can help people feel more comfortable than they would by only verbally discussing the upcoming opportunity.

Some people may want to take a bit of time to think about the decision to share their story, or talk it over with a spouse or someone in their family. If you are introducing the form through a conversation, you may say something like:

“Thanks for agreeing to share your story (photo, etc.). Before I can share your story with [individual or organization’s name], I need you to sign a consent form that allows us to share your contact information (photo, etc.).”

If you are collecting the form in person, you would ask the person to sign the form. If not, try to immediately email or send the form to the person and ask her to send it back before proceeding.

It may be difficult for people to send forms back to you before the request deadline. Not everyone has access to a printer, scanner, or other technologies that make receiving and sending a form convenient. If that’s the case, work with the storyteller to come up with a solution that will still allow him or her to participate. One way to do that is to have someone offer her verbal consent and then mail a copy of the written consent form to you.

However you proceed, try to make the process of signing the form as easy as possible for the storyteller. If the request is not time-sensitive, snail mail is another option.

Once you have collected one form from an individual, file it in a safe place. This could be a folder in your office, a place on a shared computer drive, or a document storage system in your database. If you have future requests for that particular storyteller, it may not be necessary for you to ask him or her to sign a consent form for each opportunity.

While using a consent form may slow down or limit your organization’s ability to respond to a request, that’s a chance you may have to take in order to protect both parties.