



Guide to Creating a Comprehensive Outreach Plan

At the heart of any effective story bank are the voices of storytellers and personal experiences that can shed light on a particular issue. Personal stories are a powerful tool that can help raise awareness, educate the public, and affect policy and legislation. Putting a face on an issue can help make it real and drive your message home.

As someone who is working to create a story bank for your organization, you have a real opportunity to give a voice to the voiceless. But you must first determine what kinds of stories are best going to illustrate the issues that your organization works on.

Think through what types of stories will best highlight your organization's mission

One of the first things you will need to do when developing your story bank is to find people willing to share their stories with your organization. The trick is finding people who have the right kind of story to highlight your organization's mission and who are willing to speak publicly. To do this, you need to create an outreach plan to identify the kinds of stories you want to tell and determine where you will find them.

It takes a lot of careful, thoughtful work to build a story bank of people whose stories illustrate what you are trying to accomplish through your organization's mission, priorities or goals, and areas of work. You will need to be intentional and methodical in your approach.

In this piece, we will discuss the strategies that will help you develop a plan that closely aligns with your organization's work. We'll walk through the following six-step process to help you most effectively reach out to potential storytellers and evaluate your story bank's progress.

1. **Understand** your organization's mission, priorities, areas of work, and activities.
2. **Brainstorm** types of stories that best illustrate what your organization is trying to accomplish or has already accomplished.
3. **Identify** the best messengers for the kinds of stories you are hoping to tell, and common characteristics of the storytellers.
4. **Assess** opportunities to find the stories and storytellers your organization is hoping to highlight, starting with organizational activities that already reach potential storytellers, then, surveying partner organizations that can help you reach your target populations.
5. **Draft** and implement a plan for collecting stories.
6. **Evaluate** efforts over time.



Throughout this guide, we reference a mock organization called “Lower Costs Now!” We will also reference its story bank coordinator, Erica, and the organization’s efforts to build a story bank. This example will help illustrate what a comprehensive outreach plan might look like. You may need to adapt specific tactics depending on your organization’s structure.

Keep in mind that the cornerstone of any story bank program is an active effort to collect stories. To help make sure that your organization has a variety of storytellers and types of stories, it is important to have more than one method of collecting stories. By establishing a varied and diverse effort for collecting stories, you have a greater likelihood of building a story bank that meets your organization’s expectations. Collecting stories using several different methods may take more work than relying on one mechanism, but ultimately, it will leave you with more options.

Outreach Plan Six Steps

Understand



Brainstorm



Identify



Assess



Draft



Evaluate



Step 1: Understand Your Organization’s Mission, Priorities, Areas of Work, and Activities

Before you begin to plan a specific approach and tactics, take some time to learn a little bit more about your organization, its mission, priorities or goals, areas of work, and activities. Understanding your organization can help you think through the most valuable stories for your organization’s work and your ability to reach those storytellers.

Compiling this information into one comprehensive list or chart can serve as the framework for any later plans.

This exercise is particularly useful if you are building a story bank from scratch, though organizations that are looking to evaluate their existing story bank work may also find it helpful. Compile this information in one centralized place (see “Outreach Worksheet” in *Creating a Plan* as an example).

Understand your organization’s work

At this point, you are looking only for a broad, big-picture view of your organization’s work. You may find that your organization focuses on areas of work categorized as “health care,” “environmental justice,” “small business,” or “food security.” Maybe your organization has more specific priorities, for example, “health care” might be broken down into “securing access to health coverage for low-income people,” and “ensuring all children have

access to health care.” Whether you work on one priority issue or a dozen, it’s important to get an overall sense of each of those issues before identifying the kinds of stories you want to collect.

Take inventory of your organization’s activities and partners

Next, list all of your organization’s outward-facing activities and programs. Depending on your organization’s structure, this could include many kinds of work. List resources like:

- » digital tools, such as email newsletters, social media platforms, and websites
- » direct assistance activities, such as a helpline, clinic, or assistance program
- » advocacy and grassroots efforts, including door-to-door campaigns, conventions, and rallies
- » printed materials, including pamphlets

As you develop the list, note your target audience. Some of your activities may be consumer or partner-facing. As you develop a list of tactics in your outreach plan, you will use each of these kinds of activities in slightly different ways. For now, just work on building the broadest possible picture of all of the activities or events where you *could* collect stories. Later, we’ll talk about which tactics might work in practice.

Make sure that your organization’s mission and goals remain at the forefront of building your story bank and interacting with story bank participants. Your mission and goals will help determine the types of stories you want to collect, how to engage with storytellers, and the way you frame your outreach efforts to other groups.



Additionally, list partners that may help in your effort to collect stories. In the beginning, it's helpful to look at groups that belong to the same coalitions or groups you may work with on a regular basis before you decide to expand to other partners.

Why use a mission-driven approach to collect stories?

When you first begin to discuss your vision for a story bank, it can be easy to get caught up in dreaming of all of the different kinds of stories you might tell.

Any outreach plan that you create should maximize the diversity of storyteller voices on an issue, welcoming storytellers from all walks of life and circumstances.

A broad, mission-driven approach will help your organization remain open to hearing experiences that you might not otherwise anticipate.

Collect as broadly as possible on any given issue. Some of the strongest storytellers challenge perceptions and shed light on issues for an organization and the public. Make sure any outreach effort includes these different kinds of perspectives—you don't want to exclude opportunities to hear from an unlikely ally.

Once you develop a list of your organization's mission, priorities, and goals, you won't have to amend this list until your organization's work changes. This can happen when your organization adds a priority program, develops a new tool, or forms a new partnership.

EXAMPLE

The organization Lower Costs Now! has a simple mission—to lower the cost of prescription drugs for people living in California. It has two main goals:

- 1. Lower the cost of treatment for high-cost diseases, like cancer and auto-immune conditions*
- 2. Guarantee that health insurance companies cover prescriptions*

Erica speaks with different members of the organization to understand each of their activities and potential partners. She looks at places where the organization interacts with potential storytellers, including in-person activities and digital platforms. Additionally, she brainstorms a list of close partner organizations that share common goals and who may be willing to help collect stories.

Erica sits down with her team to discuss its story bank plan for a campaign. A member of the

organization decides that its outreach plan should be tailored to collecting the stories of African American males ages 30 to 50 who have used one particular chemotherapy treatment.

While the particular story that this Lower Costs Now! staffer would like to find and highlight might advance an important issue, it would also lead to an effort to collect stories that misses many other types of stories that would help advance the organization's work.

Instead, Lower Costs Now! decides to create a program that stems from its organizational mission, goals, and broad issue areas. It first examines its mission, then its goals and issue areas. Afterward, it decides to address only one of its organizational priorities: lowering the cost of treatment for cancer.

The goal of its story bank effort becomes: Creating a story bank that includes a variety of people who have received or will receive treatment for cancer and can speak about affordability.



Step 2: Brainstorm Types of Stories That Best Illustrate What Your Organization Is Trying to Accomplish or Has Already Accomplished

Next, determine the types of stories that best illustrate your organization's priorities or goals. If you find that there are many areas that you would like your story bank to support, consider starting with just one area.

Types of stories

Examine the list of issues that your organization works on and brainstorm the kinds of stories that would best illustrate what your organization wants to accomplish on those topics.

As you develop this list, consult with subject matter experts in your organization. People who have intimate knowledge of certain issues often have helpful ideas about what kinds of stories would best illustrate those issues.

Beyond your own staff, explore other opportunities to learn about the kinds of stories you are hoping to highlight. This might include monitoring the news,

reading articles, or following other subject matter experts on social media. By doing this, you will ensure that you are thinking broadly about a topic. Widely monitoring a subject will also help inform your work as you create a list of questions to use during the process of developing stories (interviewing storytellers, fact-checking, and verifying information).

It can be incredibly valuable for your organization to have stories in its story bank that directly link to a policy or piece of legislation. While personal stories are phenomenal tools in showing the need for reform, they are equally strong in showing where programs, policies, and laws are working well for people. These kinds of stories will come in handy for public education efforts or if funding, policies, and legislation are ever at risk.

As you build your list, start with the broadest, most general story themes, then whittle those down to more specific themes.

EXAMPLE

Lower Costs Now! has decided to find stories that show the impact of the cost of prescription drugs, focusing on cancer treatments.

The organization can choose to tell this story in a variety of ways. It could examine the cost of treatment for people with specific kinds of health insurance, or it could focus on the expenses of particular treatments.

Each time the organization refines its criteria, it narrows the opportunities for the organization to collect stories. For example, if Lower Costs Now! starts out looking for a storyteller who takes Cytomax (a drug used in cancer treatment that can cost more than \$100,000 per year), is covered through an insurance plan bought in the private market, and has a \$2,000 deductible, it may be like looking for a needle in a haystack.

It makes sense to begin with a broad list before narrowing to very specific criteria. This will ensure that Lower Costs Now! does not miss out on powerful stories that might not check every box in a refined set of criteria.

If, over time, Lower Costs Now!'s efforts to collect stories are successful, and it finds that a lot of people have an interest in telling their stories about affording Avastin specifically, it may make sense to then focus on people who take that drug.

Also note that this example does not limit the types of stories represented. The topic areas do not demand that Lower Costs Now! collect stories only from people who struggle to pay for their cancer drugs. Instead, it is looking for the experiences of anyone who takes a high-cost cancer drug. That allows for a greater variety of stories at the onset of their efforts to collect stories.



Step 3: Identify the Best Messengers for the Kinds of Stories You Are Hoping to Tell and Common Characteristics of the Storytellers

Each type of story that your organization wishes to tell may present itself slightly differently. You may want to ask people from different demographic groups to tell different types of stories. In these groups, there may be common elements of experiences or specific opportunities that lend themselves to a particular type of storyteller. It's helpful to create a profile and plan for each *type* of story you want to collect.

Types of storytellers

While it's crucial to think through the kinds of stories your organization will tell, it is equally important to determine *who* will be the best messengers. Every issue can be told from a variety of perspectives. Some of these will be more valuable than others. For example, with people who experience high drug costs, you might hear an entirely different perspective when interviewing a patient, doctor, advocate, social worker, or hospital administrator. It's important to understand how each unique voice contributes to a full picture.

Common characteristics of storytellers

Once you have determined the kinds of storytellers you are looking for, examine whether these people share any other characteristics. As you learn more about the types of people who can tell a particular kind of story, you may discover that the storytellers all fall within a specific age range or income bracket. They may have common experiences (for example, many were denied health insurance in the past), or maybe they participated in specific programs (for example, a clinic's services or Medicaid).

If that's the case, it's safe to assume that you will need to factor this into your efforts to collect stories. Depending on your criteria, you may need to take a more sophisticated, targeted approach to collecting stories than you otherwise might. It may not make sense to collect a lot of broad, general stories and hope that the right storyteller falls into your lap. Instead, you should plan to participate in certain activities where you know you will be more likely to reach your intended storytellers.

By developing a plan that engages specific experiences and populations, you can build a story bank that contains the types of stories that exemplify your organization's mission and goals. Sometimes, this can be challenging, but don't give up! Your efforts will pay off.



Here are some factors to consider if you want to create a plan to reach a more tailored group of people:

- » Specific age range
- » Income level
- » Involvement with your organization (for instance, why the individual volunteers with your organization, how your organization helped him or her, why he or she came to you for the first time)
- » Geographic location
- » Gender
- » Race or ethnicity
- » Language spoken
- » Employment status
- » Medical condition
- » Experience with a particular program (like Medicaid, SNAP/food stamps, Medicare, etc.)
- » Profession or involvement with the issue (consumer, patient, family member, health care provider, volunteer, etc.)

Once you have settled on a type of storyteller, talk to members of your organization who might work with the kinds of people you're trying to reach. Your colleagues may have ideas about how to approach these populations and insight into which methods work better than others.

EXAMPLE

Lower Costs Now! decides that the most powerful stories will come from patients and their immediate family members. They can speak directly to the impact of the cost of care.

As Erica discusses the best kinds of stories to illustrate the cost of living with cancer, her staff members offer a variety of suggestions. She compiles a list and decides that their efforts to collect stories should seek the following:

- *People who rely on charitable and public prescription assistance programs*
- *People who are currently in treatment for cancer*
- *Families with high medical debt*

The organization also determines that the while it would like to collect stories from around California, it especially needs stories in Alameda and Contra Costa counties for a project it hopes to undertake. Therefore, it decides to focus its efforts on those two counties.



Step 4: Assess Opportunities to Find the Stories and Storytellers Your Organization Is Hoping to Highlight

Once you've identified the types of stories you are looking for, determine the best places to find people with those stories. Begin with any internal activities that involve the demographics you are trying to reach, and then move on to surveying additional partners and external opportunities.

As you develop your plan, make every effort to build strategies that will help you reach your target populations. In short, go where the storytellers are.

Look for activities or events your organization already hosts as a way to integrate collecting stories

The most efficient way to collect stories is to take advantage of your organization's existing activities and programs. Examine all aspects of your work that may reach your target demographic or population to see what lends itself to collecting stories, from your digital presence to community outreach to physical offices. For this exercise, use the list of activities generated in Step 1 of this guide on page 3.

Depending on the type of organization you work for, you may already have a path to potential storytellers. For example, if you have a large membership, provide direct services, or are a grassroots group, look for natural places to incorporate collecting stories with populations you serve, reach, and represent. Maybe you run a helpline, host a free clinic, sponsor information sessions, or organize rallies. All of these could provide excellent opportunities to collect stories. Work with other departments to identify whether your organization interacts with potential storytellers.

In each of the places you identify, ask yourself, "Can we somehow fit collecting stories into this activity?" You may have to get creative in thinking about how you collect stories in certain settings. Before you settle on specific

activities, also think through what you are hoping to collect. If you're looking for photos, examine how you can integrate taking or submitting photos into an event or activity. Matching activities and collection opportunities will help make sure you're investing your time and resources wisely.

If your organization determines it *is* worth it to collect stories but you don't have access to the right kind of storyteller, you should consider how other kinds of opportunities can help you meet your goal.

As you examine other activities that are more partner-facing, examine whether there are opportunities to publicize your efforts to collect stories. You may want to consider promotional tactics such as writing a blog or a newsletter article about your story bank. These efforts can inform other organizations about your work, and it may provide opportunities to solicit partners, should the need arise.

Survey external opportunities and partnerships to help collect stories

Sometimes, an organization may discover that it needs to expand the scope of its efforts beyond its own doors. In that case, the best course of action is to determine opportunities to collect stories outside the organization. You can accomplish this in two ways: First, you may examine partner organizations to see if they have resources that can help you reach your target demographic group. Second, survey new opportunities to collect stories. This includes events and potential new partners.

If you decide you need to partner with other organizations to collect stories, make sure that you select them based on whether they can help you reach out to your desired demographic group.

Maybe these other groups host events where you could collect stories, or maybe they would be willing to refer the people they work with to your organization. You can



also expand your range of partners. Call the organization that you are interested in partnering with, clearly explain what you're trying to accomplish, and see if there's a way to work together in future efforts. Don't be afraid to ask for help—often times, organizations are seeking to accomplish the same goal.

Before you begin your partnership, agree on a protocol that will help protect both of your organizations and your storytellers. Discuss how you contact storytellers and when, how you highlight stories, and how you will protect storytellers' privacy. Arriving at a common understanding will help ensure that the partnership proceeds smoothly.

EXAMPLE

Lower Costs Now! has three main areas where it interacts with people who have the types of stories it wants to collect. 1) It has a robust digital presence 2) runs a help line 3) cosponsors a health clinic twice a year. Erica decides to first examine how to integrate stories using the help line.

The help line offers assistance to people struggling to pay their prescriptions. If Lower Costs Now! chooses to build its story bank from people who have used its services, then possible story bank candidates include every person it has assisted or may assist in the future. Because of this, it can quickly identify storytellers.

The challenge this tactic presents is incorporating opportunities to collect stories into the call center's work. After a bit of brainstorming, Erica makes a list of ideas. She could record a message on the call center's on-hold audio recording asking for stories, send an email to all people who have shared their phone number after using the call center, and ask call center representatives to request the people they are helping share their story. After meeting with the call center director, Erica decides the organization will train representatives to ask callers whether they would be interested in sharing their experiences.

As Erica examines other components of Lower Costs Now's activities, she settles on the following plan to collect stories:

- *A robust digital campaign to collect stories, including posts to social media and special emails to the listserv*
- *Work with the call center director to implement a way to gather stories when people call the help line*
- *A table at the two clinics for story submissions or staff collecting stories*

Lower Costs Now! has an upcoming campaign in Alameda and Contra Costa Counties. There's a proposed cut in funding to a prescription assistance program that helps its clients. It has some stories that will help, but it needs additional stories for a more robust campaign.

It might start by using the methods above to ask people who call the help line. Then, it expands its methods beyond its doors to other people in the community. Here, it might consider reaching out at community events or partnering with other organizations that work with the same demographic. As Erica examines partner organizations in those counties, she comes up with the following plan:

- *Reach out to a charity prescription program that serves people in Contra Costa County*
- *Reach out to a cancer survivor organization in the San Francisco Bay Area*
- *Attend a health care rally in Oakland and set up a booth to collect stories*



Step 5: Draft and Implement a Plan for Collecting Stories

Once you have determined the necessary information about the types of stories and storytellers you hope to find and the resources available, you are ready to start crafting a plan to collect stories. As you develop your plan, consider using an approach that incorporates digital and in-person methods of collection.

A work plan will help you organize your team's activities over time. It will ensure that you remain focused and on track to accomplish the task. Build your plan as far in advance as possible. It may take several months to identify a need, mobilize an effort to collect stories, and develop stories that will fit your purpose. (See "Example Work Plan" in *Creating a Plan* for an example.)

Your work plan should align with your organization's mission while maximizing the resources available. For each campaign, define your goals, activities, and strategies as precisely as possible. Work with whomever

is developing stories to ensure that you are meeting your organization's expectations. Adjust your campaign as you meet your goals and as they shift.

Set realistic expectations for your outreach efforts

As you create your plan to collect stories, set attainable, realistic goals for your organization. This is especially important when it comes to the number of stories you hope to collect.

You should expect some "loss" between the people you ask to share their story and the stories you are able to eventually share publicly (see the example below). There are many factors that can affect an individual's ability or decision to participate in an opportunity to share his or her story.

As your organization builds its story bank, you will learn which methods of collecting stories yield the best results for particular requests. You will also develop standards for a successful effort to collect stories. For some organizations, that could be sheer volume, while for others, it could be quality.

EXAMPLE

Now that Lower Costs Now! has a broad sense of how it wants to proceed, it can create a plan for its story bank. Using the goals for the story bank and the proposed activities, Erica creates a work plan to demonstrate how the story bank will come together. She lists separate activities, assigns responsibility to a staff member, and sets a timeline.

Lower Costs Now! has the following experience with a request for stories:

- *Erica emails 5,000 people requesting that they share their experiences with prescription coverage.*

- *Of those, 300 respond. There are a wide variety of responses, including opinions and past experiences.*
- *Only 100 stories fit the target criteria.*
- *After reaching out to those individuals to further develop their stories, only 30 people are willing to be interviewed.*
- *Of those, 12 have the type of experience with prescriptions that is needed for this project.*



Step 6: Evaluate Efforts over Time

Once you get into a routine, these three components should become ingrained in the way you work.

1. Develop a plan
2. Implement the plan
3. Evaluate your efforts, and adapt to make sure you are collecting the right kinds of stories to meet your goals

Your organization should periodically evaluate efforts to make sure that your work aligns with your mission. You may choose to re-evaluate at the end of collection campaigns,

as you begin to collect a new kind of story, or as a need arises. Always ask yourself, “How effective are our efforts to collect and develop stories and find storytellers? Are we finding the storytellers that best complement our organizational activities?”

Organizations change their focus over time in response to new projects, developments, trends, and the general landscape in their field. Periodically evaluating your approach to collect stories will ensure that your story bank is always relevant to your organization’s work.

EXAMPLE

After six months, Erica examines the organization’s story bank efforts. She weighs the number and quality of stories her staff has collected and developed against the needs of the organization to see if the tactics are still working or if she needs to tweak them or change them altogether. At the same time, she checks the

organization’s goals, activities, and priorities to see if anything has changed.

If the organization has developed new goals, activities, or priorities since her team launched the story bank, Erica adapts the work plan to incorporate the new information. If not, she proceeds as usual.

For the full Story Bank Toolkit, visit:
www.familiesusa.org/story-bank-toolkit

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1201 New York Avenue NW, Suite 1100
Washington, DC 20005
202-628-3030
info@familiesusa.org
www.FamiliesUSA.org
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