



Developing Stories

How to Interview Storytellers

Talking with storytellers and developing stories is the heart of a successful story banking program.

An interview serves two purposes:

1. It provides the opportunity to learn more about the individual’s life, challenges, and successes.
2. It provides storytellers the chance to learn more about your organization and the kinds of opportunities that they may be able to participate in. The process of collecting story leads, whether online or through in-person events, builds a foundation for engagement. But it is the interview that solidifies your relationship as partners in storytelling.

Note that the interview is just one step in the process of developing a story. To complete the process, the interviewer must create a set of notes about the storyteller, verify the information provided, and fact check. See “How to Develop Internal Comments” and “Sample Developed Stories” (both in *Developing Stories*) for more information.

Whether you will be the interviewer or you delegate this important task to someone else, this piece gives you key interviewing techniques to help make the most out of your interactions with storytellers.

Interviewing Basics

The interviewer’s responsibilities

The interviewer will need to balance multiple priorities while talking to the storyteller. The interviewer has five main duties:

1. **Set boundaries and provide direction for the interview.** This includes setting the tone and making sure the interview stays on topic.
2. **Draw out the details of the storyteller’s life and how he got to this point.** While the interviewer should drive the discussion forward through questions, she should let the storyteller speak as much as possible.
3. **Determine the validity of the story and how it will stand up to scrutiny.** As the interviewer listens to the storyteller, she should look for holes in the story and places that may lend themselves to speculation when the public hears the story. Unfortunately, public audiences sometimes make assumptions and judge storytellers. An interviewer should think critically during the interview about these places in someone’s story and clarify details to reduce the possibilities for judgment or confusion.
4. **Constantly gauge how the storyteller tells his story.** The interviewer should evaluate a person’s speaking style and presentation and think about what kinds of storytelling opportunities for which he might be a good fit.
5. **Serve as an ambassador of your organization.** This is especially important to remember if storytellers don’t already have a relationship with your organization, if they begin to discuss controversial or sensitive subjects, or ask for the interviewer’s opinion on a topic.



Develop background knowledge

One of the best ways to prepare to interview a large number of people is for the interviewer to familiarize herself with the subjects that may come up in conversation. Developing a knowledge base about relevant subjects will help the interviewer feel more comfortable and confident when talking to a storyteller. This will help the interviewer be flexible throughout the interview, place the story in a broader context, and understand whether the details that a storyteller provides add up.

The interviewer should develop a working knowledge of the relevant subjects and information that may affect her interviews. She can accomplish this by reading relevant news; monitoring materials that advocacy, policy, and research organizations produce; and talking to colleagues who have direct experience in that particular field. The interviewer should stay up-to-date on the latest developments related to the topic.

The interviewer should prepare for the interview and educate herself in the following areas:

- » **Subject matter:** The interviewer should educate herself on the details of the interview topic so that she is comfortable asking questions.
- » **Details that affect the storyteller:** With the help of your organization, the interviewer should research information about this person's background, such as how an illness he has is typically treated.
- » **Cultural competency:** Your organization should provide the interviewer with training or resources to learn about specific barriers and obstacles that certain demographic groups face.

For instance, let's say an organization wants to collect stories from people who have enrolled in health insurance. Staff should work with the interviewer to make sure she has researched the common health insurance programs that are available, like Medicaid or the Children's Health Insurance Program (CHIP). The staff should also work with the interviewer so that she is familiar with eligibility requirements and different ways people can enroll in health insurance.

Next, the organization and interviewer could look up what health insurance options were like before the Affordable Care Act was fully implemented. What were consumers' experiences applying for health insurance before this law was passed?

Lastly, the organization and the interviewer should learn about what barriers exist for communities of color that prevent them from getting the health care they need. If the interviewer is talking to people of color, this background information can help inform her questions.

Types of questions to ask

The way an interviewer asks a question can affect the type of response a storyteller provides. If an interviewer just asks yes/no questions, it will be impossible to extract detailed information about the storyteller's life. Therefore, it is important to learn a variety of ways to ask questions. Once interviewers learn about the kinds of questions they can ask, it will be easier to figure out which method to use to elicit the response that they are hoping to find.

Except in circumstances where conversation helps open dialogue or makes a storyteller more comfortable, questions should stay relevant to the story and the subject at hand. It can be tempting to go down the rabbit hole on any number of issues that are not related to the story, but if that happens, make a mental note and steer the conversation back to the intended subject.



An interviewer should always be aware of the intention of the question she is asking. She should always strive for clear, easy-to-understand questions. If the interviewer asks a garbled or unclear question, the storyteller may not know how to respond and probably won't offer an answer that the interviewer finds helpful.

The following are different types of questions to ask in an interview.

Open-ended

An open-ended question is a question that requires the individual to answer based on his own knowledge and/or feelings. Here, the interviewer is not looking for a specific answer. Open-ended questions often begin with words like, “Who,” “What,” “Where,” “When,” “Why,” and “How.” These are particularly helpful when trying to start a conversation or learn as much as you can in a short period of time. For example:

“Why did you choose to enroll in health insurance?”

“How did you discover that you have cancer?”

“What happened when you took your son to the doctor?”

Closed-ended

A closed-ended question is looking for a specific response. In these types of questions, the interviewer is looking for a limited, definite answer, such as a “yes” or “no,” or a short reply from a limited number of options. Interviewers can use these types of questions to elicit facts, details, or confirmation.

Closed-ended questions are especially helpful if the individual does not provide certain information during an open-ended question. Examples of closed-ended questions include:

“Do you currently have health insurance?”

“How many people live in your household?”

“How much do you pay out of pocket for prescription drugs?”

“What kind of insurance do you have?”

Cause and effect

It is important to ask about the effects of changing circumstances, decisions, and policies throughout the interview. One way to do this is to ask questions that prompt the storyteller to explain what caused something to happen and its effect on his life. For example:

“What caused you to be uninsured?”

“What effect has that had on your family?”

This can be especially useful when trying to determine the impact something had on health, family, finances, and emotions.

Factual versus opinion

As an interviewer works with a storyteller to learn more about his story, distinguish between questions that require fact-based answers versus opinion-based answers. Factual questions demand answers that are verifiable and specific, whereas opinion questions do not. It's important to have a balance of the two types of questions and answers throughout the conversation.

Difficult questions

Sometimes, it is necessary for the interviewer to ask difficult questions during the course of the interview. Some storytellers will be completely open about their lives and no subject will be off the table. But others will hesitate



about sharing certain details. These sensitive areas will vary from person to person. Someone may be more nervous when it comes to sharing details of his income, while another person may not be willing to talk about an emotional subject.

Often, the most challenging subjects for storytellers to share are those where they feel judged or shamed. These include, but are not limited to, receiving public assistance, experiencing financial troubles, experiencing mental illness, and involvement in the legal system. Other difficult, emotional subjects include major illness or the death of a family member.

Save difficult questions for the end of the interview, after the interviewer establishes rapport with the storyteller. While these questions are not always comfortable for the storyteller or the interviewer, they can be necessary for fact-checking and safeguarding the storyteller from controversy. It's easier to ask these questions at this stage than have something come up in a public way during or after a storytelling opportunity.

Depending on the situation, it may help for the interviewer to preface the question by saying something like, "I know this is a hard subject to talk about, but I need to ask you..." Acknowledging the difficulty of a question can go a long way in helping continue to build rapport.

Preparing for the Interview

Before an interviewer sits down to interview a storyteller, she should take some time to prepare. At a bare minimum, this should include reviewing the story lead, determining basic themes that she may want to explore in the conversation, and doing a bit of background research on any topics that might come up that she's not familiar with. Careful preparation can make or break an interview with someone, so it is a good idea for the interviewer to dedicate however much time she'll need to review information before picking up the phone.

An interviewer should sit down prior to an interview and carefully review the story lead. She should ask herself, "What is the basic theme of the story? What are the areas that require exploration?" By determining these themes and building background information, the interviewer can determine what questions to ask in the conversation. This can help tailor conversations to each individual storyteller, allowing the interviewer to remain flexible.

Let's look at an example to see how this would work in practice:

Andrew recently got his master's degree and is doing freelance writing while he looks for full-time employment. He recently aged off his parents' health insurance policy, so he was happy to speak with a navigator and find out he could get affordable coverage. He has type 1 diabetes.

The person who collected this lead was careful to lay out five distinct areas of Andrew's story that need to be explored in the interview.

1. He enrolled in health insurance, so any question that the interviewer asks should relate back to enrollment in some way.
2. He's in between jobs, though his employment status may have changed, depending on when the person collected the story lead.
3. He aged off his parents' insurance policy. The coverage he bought through the marketplace may be the first insurance he has bought on his own.
4. He has type 1 diabetes, so doctor visits and coverage for prescriptions are likely important to him.
5. He enrolled with the help of a navigator.



Some of these areas are explicitly offered in the story lead (Andrew used a navigator and aged off his parents' plan). Others (knowing that diabetes requires potentially expensive medication) come from background knowledge about how a chronic condition is treated. The themes are a combination of information offered and outside knowledge about enrollment and treatment that the interviewer learned in her preparation.

The interviewer has an advantage by knowing these five pieces of information: By knowing that information, the interviewer can then focus on asking Andrew about his employment status, the transition between his parents' policy and his own, whether his policy allows him to treat his illness, and his experience with in-person assistance.

By preparing for the interview and reading Andrew's story lead, the interviewer learns about relevant subject areas that will help establish the kinds of questions that she needs to ask to get more information. See "Sample Story Summaries" (in *Developing Stories*) to read Andrew's story summary.

Sometimes, however, an interviewer won't have enough information to research the person's background or prepare before a call. These are the most difficult interviews to prepare for, and they typically come up when the person who collected the story provided little to no information.

In these interviews, having a lot of background knowledge can help determine the questions to ask throughout the conversation. This is why it is important to emphasize the importance of including details with the people collecting story leads. See "Tips and Tricks for Interviewing Storytellers" (in *Developing Stories*) for more information about how to interview a storyteller with little information, and "How to Train People to Collect Stories" (in *Collecting Stories*) for more details on how to help people collecting stories capture the right information.

Structuring an Interview

The interviewer can break down the interview into three separate parts:

1. The introduction
2. The interview
3. The conclusion

The introduction and the conclusion should frame the conversation, setting expectations for what the storyteller can expect from participating in your organization's story bank. The interview should focus on the person's story.

1. Introduction

Whether an interviewer is talking to a first-timer or a seasoned storyteller, it is necessary to set clear expectations at the beginning of the call. Interviewees should know what will happen to their information if they talk to your organization, which may mean clearing up any misconceptions or misunderstandings. This includes providing a broad overview of your organization's story bank, reviewing the subjects to discuss on the call, and making sure the storyteller has answers to his or her questions before continuing. Providing this information will help an interviewer gain the storyteller's trust.

The following is a list of items to incorporate into a standardized way of handling introductions during an interview.

- » Introduce yourself and thank the individual for agreeing to speak to you.
- » Explain the project, in this case, your story bank. If you received the story lead from a partner organization, provide information about *your* organization so the person understands more about your work.



- » Define the purpose of the interview. The interview is to learn more about the storyteller, so you'll ask questions throughout the conversation. During the conversation, you will take notes for your internal record keeping.
- » Describe what will happen to any information shared in the interview and the storyteller's contact information. You will protect the storyteller's private information, including name, contact information, and story. His information will not be used or released without his explicit permission.
- » Describe the consent process before any storytelling opportunity. Reassure the storyteller that he must actively give consent for any storytelling opportunity. Your organization will work with him to find opportunities that fit.
- » Ensure that the storyteller is still willing to participate.
- » Ask if the storyteller has any remaining questions.

At the end of this document, on page 10, you will find a sample script to see how this conversation works in practice.

2. Interview

The easiest way for an interviewer to begin the interview is with a broad, open ended-question that relates to the information provided in the story lead. Opening the conversation in this manner provides a welcoming introduction. This may be something as simple as, "Why did you decide to look for health insurance?" or "How has Medicare been working for your family?"

Leaving the question as open as possible allows the storyteller to take the conversation in a direction he is most comfortable with. From there the interviewer should follow the storyteller in conversation and flesh out the person's story with additional questions. An interviewer should aim to use mostly open-ended questions and

incorporate closed-ended questions when she needs specific information.

The best interviews are those that flow like a conversation. If an interviewer relies on a list of predetermined questions, the interview can feel inflexible, cold, and mechanical. Instead, it can be helpful to adapt types of questions according to the story themes that emerge. This will allow the interviewer to modify questions for the particular storyteller as the interview unfolds.

Throughout the interview, the interviewer should work on making the storyteller more comfortable and building rapport. Using open-ended questions and careful listening can go a long way toward making this happen. If the interviewer begins to introduce close-ended or difficult questions at the start of the interview, she may come off as confrontational, causing the interviewee to stop answering freely. Where possible, ask difficult questions toward the end of an interview rather than upfront.

The interviewer should always make sure that she is developing a clear timeline of the individual's story. She should look for a beginning point, follow the storyteller through to the present, and then ask the person about his future. Having all three elements in place will help make the story more compelling than if the interviewer only provides a retrospective or prospective view.

At the end of the interview, the interviewer should make sure she has collected all of the necessary information she needs for her notes, including demographic information. Many details will come out in the course of the conversation, but it doesn't hurt to verify that the information is correct.

3. Conclusion

Before hanging up the phone, the interviewer should set clear expectations with the storyteller about what will happen now that he has shared his story with your organization.



Sometimes, an interview will unfold in a completely different way than the interviewer anticipated. If that's the case, remain flexible until the storyteller establishes the basic story themes.

Much like the introduction, it can be helpful to develop a standard practice. The interviewer should talk to him about how a request to share his story will work. Even if the interviewer has already discussed privacy protections at the beginning of the interview, it's a good idea to reiterate some of that information again. Many storytellers will find it reassuring to hear that they will be contacted by your organization initially for a request, rather than by a reporter. This could put the storyteller's mind at ease.

At the end, storytellers will often have additional questions that they did not think of or were afraid to ask at the beginning. This is the perfect time to let them ask additional questions.

After the interview

Once an interview is complete, the interviewer should take time to write out any summaries or internal comments as soon as possible while the interaction is fresh in her mind. She should make sure she has all the details necessary to complete her notes. If she finds that she's missing a piece of information, it's easy to contact the individual and ask to have him answer any remaining questions.

The interviewer should also consider taking time to verify information. She can do this through a Google search, but she should also check eligibility for programs and details about covered services. This step can help ensure the validity of an individual's story.

An interviewer may also wish to send a thank you note to a storyteller. This helps solidify the relationship and provides an additional opportunity for storytellers to include any details they forgot to mention in the interview.

Practicing

Training others on how to interview can be tricky. If you are looking to train people on your team, set a balance between observing interviews and exercises to prepare people to interview. The goal should be to help people become more comfortable with asking questions and listening deeply. The following is a set of exercises that you can use in training.

Determining questions to ask. As a group, take a look at a story lead. Ask everyone to spend a few minutes evaluating the lead and determining the types of questions they might ask the storyteller if they were going to do the interview. Emphasize the importance of close listening, bringing in any policy background people might have that could contribute to asking good questions. This can be an especially eye-opening exercise to do in a group of people with diverse backgrounds—many people think in different ways.

Deep listening. Break up the people you are training into groups of two or three. Ask one person to spend two to three minutes telling his story to the other two individuals. The story should be about a personal event in the individual's life. While he is telling his story, the others should actively listen to him. They can take notes if they wish.

After that, everyone in the group should spend five minutes creating a short story summary. The person who told the story should reflect on what it felt like to tell his story.

At the conclusion, everyone should read their notes and share their experiences with the group. Rotate to make sure everyone has the opportunity to share their story. This



exercise will give everyone the opportunity to engage in active, deep listening from both sides of the conversation. It will also help show the different kinds of information that people gather when listening to a storyteller.

Practice interviews. Once your organization has developed a basic framework for your calls, it can be helpful to do mock interviews with each other. Practice opening and closing an interview, asking different types of questions, and soliciting details about the story.

Listen to other interviewers. While this is not an exercise per se, it's an activity that many find helpful.

There are many interviews available on a variety of subjects and in different formats. It can be instructional to listen to professional interviewers and oral historians talk to people from all walks of life. Take note of what works well, how interviewers guide conversations, and how they can open up the conversation on a sensitive subject. Listen to television shows, radio interviews, podcasts, and YouTube videos featuring strong interviewers. We recommend three engaging and excellent interviewers: Studs Terkel, Krista Tippett, and Terry Gross (see "Additional Resources").

General Tips

Check information as you go

No matter how hard an interviewer listens during an interview, it's easy to get turned around when listening to the details of someone's life. The storyteller could be talking a mile a minute, give information that sounds conflicting, or jumble his timeline when telling his story.

The best way to combat this is for an interviewer to repeat back to the storyteller what she has heard. The interviewer can say something like, "Let me get this right..." or "Your words are making me picture..." Repeating phrases back

and using the same language as the storyteller will help clarify information, and it will help storytellers understand that the interviewer is listening to him.

Focus and free yourself from distractions before an interview

Before an interview takes place, it is important for the interviewer to spend a few minutes freeing herself from any unnecessary distractions. If an interviewer begins an interview thinking about a meeting that just took place, a problem at home, or her to-do list, she may walk into the interview with her mind somewhere else entirely. Distracted listening will mean that important information could be lost.

Encourage interviewers to set up a personal practice to help prepare them for an interview. For some people, this could be meditation, a walk around the block, getting a cup of tea, or taking a few deep breaths. However interviewers choose to do it, they should be consistent.

Pretend you are in the same room

During the interview, the interviewer should practice active, engaged listening. It can be easier to interview someone in a private, quiet space than one that has a lot of distractions. For some people, taking notes by hand (versus on a computer) can make engaged listening easier.

One way to practice active, engaged listening is to pretend that the interviewee is in the same room. People convey a lot of information through nonverbal language (posture, facial expressions, etc.). If the interviewer reacts as though the interviewee is sitting in front of her, it will help her respond in a genuine, unaffected manner. The interviewer should not be afraid to laugh, smile, and even tear up. This is especially important for more problematic interviews where the interviewer struggles to form a connection with the interviewee or hears something that is disturbing.



Be equipped with information about your organization and your story bank

Storytellers will often have questions about the organizations that interview them. These questions can range from “How else can I get involved?” to “What is your position on X issue?” to “Who funds your organization?” Make sure an interviewer is prepared to answer basic questions like these.

Many times, storytellers will be interested in hearing more about your organization’s story bank efforts. Not everyone will be familiar with the story bank concept, and some may be confused as to how it works. Storytellers can benefit from hearing about how a storytelling opportunity works, past opportunities that were successful, and other details of your program. Interviewers should be prepared to talk about or send examples of storytelling efforts to help give storytellers an idea about what sharing their story means.

Additionally, storytellers may ask for assistance locating services or with a problem they are experiencing.

Depending on the type of assistance they request, your organization may be the best organization to help them. If you are not, it can be helpful to know the best places to send people.

Be prepared to empower storytellers and share why their voice matters

Sometimes during the course of an interview, a storyteller may lose sight of why his story matters. For a variety of reasons, he may begin to downplay or minimize his experiences. If this occurs, the interviewer may be wise to “re-set the climate” with the storyteller. For more information, see “Tips and Tricks for Interviewing Storytellers” (in *Developing Stories*) and “How to Empower Storytellers” (in *Disseminating Stories*).



Sample Scripts

The following scripts show how an interviewer can set up an appointment with a storyteller. These follow the mock organization we established in *Building an Infrastructure* called Lower Costs Now! and its story bank coordinator, Erica, as she attempts to interview storytellers. If your organization chooses to draft scripts and templates like these, you should make sure that the language you use reflects your organization's practices.

Sample phone conversation if a call has not been scheduled

Hello. May I speak to Dan?

[If Dan is not available, ask the person who picks up the phone when Dan will be available. If she does not know, make sure to get his email address if you don't already have it. That way, you can follow up via email. Provide your name, phone number, and email address to the person who answers the phone, and plan to follow up later, just in case Dan doesn't get back to you.]

My name is Erica Rodgers, and I'm the story bank coordinator for Lower Costs Now! I am working on a project to tell the stories of families who have experiences with the high cost of prescription drugs. You submitted your story to our website a few weeks ago, and I am hoping to talk to you a little bit more about your experience. Is now a good time to talk?

[If not, set up a later time to talk.]

Sample voicemail to schedule a call

Hello.

My name is Erica Rodgers, and I'm the story bank coordinator for Lower Costs Now! I am following up on a story you submitted through our website about your and your husband's experience paying for prescription drugs. I am hoping to learn more about your family's situation, and I would like to talk to you more about opportunities to share your family's story publicly. Please give me a call at your earliest convenience. My number is 999-999-9999. Again, my name is Erica Rodgers, and I'm with Lower Costs Now! I can be reached at 999-999-9999.



Sample email to schedule a call

Hi Dan,

My name is Erica Rodgers, and I'm the story bank coordinator for Lower Costs Now! I am working on a project to help tell the stories of people who have been affected by the high costs of prescription drugs. Right now, I am interviewing individuals who have experience with the rising costs of prescriptions. I am writing to follow up on your submission to our website.

Here's what you sent us:

"My husband is a cancer survivor and maintenance drugs cost us hundreds of dollars every month, even with insurance! I've been forced to take a second job just so we don't sink further into debt."

I'm interested in learning more about your family's situation and I would like to see if you would be willing to participate in opportunities to share your experiences more publicly. Is there a time in the next couple of weeks when we could chat on the phone?

Thanks,

Erica Rodgers

Sample phone interview introduction

Hi Dan, this is Erica Rodgers from Lower Costs Now! Is now still a good time to talk?

[If yes, proceed. If not, reschedule]

Thank you again for agreeing to talk with me today.

Before we get started, I want to tell you a little bit about our story bank and explain what you can expect by sharing your story with us.

Lower Costs Now! is working on a project to tell the stories of people who have been affected by high prescription drug costs. We are hoping to elevate the voices of people throughout California who can speak to this.

Today, I'd like to learn more about your family's situation. I'm going to ask you a variety of questions throughout our conversation to learn more about what you have experienced. While we're talking, I'm going to take a few notes. These are for our internal records. They help us keep track of who we've spoken to.

After our call, I will reach out to you if we have a storytelling opportunity that seems like it will be a good fit for you and your family. At that point, I would tell you about the request and see if it is something that you are interested in. You will always have the ability to opt in to any request. We will not release your name or your contact information without your explicit permission.

Are you still interested in participating?

[If yes, proceed.]

Do you have any questions for me?

[Answer any questions. Once questions have been answered, proceed with the interview.]



Sample interview conclusion

After we hang up, I will write up the notes from our call today and I will enter them into our secure, password-protected database.

Going forward, if we receive a request from someone, and I think you're a good fit, I'll reach out to you and see if it is something that you are interested in. I'll tell you a little bit about the request and talk to you about how your story would be highlighted. If it is something you would like to participate in, I will pass your contact information on to the right person. If it is something you won't want to participate in, that's ok too. The important thing is that your name and contact information will not be released without your consent.

Do you have any questions for me?

[If no, continue.]

Thank you for taking the time to talk to me today.

For the full Story Bank Toolkit, visit:

www.familiesusa.org/story-bank-toolkit

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