

# WORKING RIGOROUSLY WITH STORIES: INTRODUCING THE IMPACT STORY TOOL

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## Abstract

This presentation introduces a newly developed tool for collecting and rigorously analysing impact stories that could be used as part of an evaluation. Beneficiary stories are an easily collected data source, but without specific information in the story, it may be impossible to attribute the mentioned changes to an intervention or to verify that the change actually occurred. Approaches such as Appreciative Inquiry and the Most Significant Change Technique have been developed in response to the need to work more rigorously with this potentially rich form of data. The “Impact Story Tool” is yet another attempt to make the most of rich qualitative data and was developed and tested in the context of a few programme evaluations conducted by Feedback RA.

The tool consists of a story collection template and an evaluation rubric that allows for the story to be captured, verified and analysed. Project participants are encouraged to share examples of changes in skills, knowledge, attitudes, motivations, individual behaviours or organizational practice. The tool encourages respondents to think about the degree to which the evaluated programme contributed towards the mentioned change, and also asks for the details of another person that may be able to verify the reported change. The analyst collects the story, verifies the story and then codes the story using a rubric. When a number of stories are collected in this way, they are then analysed together with other evaluation data. It may illuminate which parts of a specific intervention are most frequently credited with contributing towards a change.

Besides introducing the tool as it was used in three different evaluations, the usefulness of this tool and possible drawbacks are discussed.

## The justification for a focus on stories

Stories told by beneficiaries are a common data source for evaluations. Short anecdotes are particularly effective in giving some prominence to the voice of beneficiaries. Usually it allows the evaluator to collect, in beneficiaries’ own words, evidence that a specific activity took place. It may also provide a view as to how the participants reacted to an event, and what the value was that a participant ascribed to such an activity. Stories are, however, perceptual in nature and may be influenced by many biases – such as a perception that not providing a positive account may influence the likelihood that the benefit provided by a specific intervention may come to an end (Henning, Van Rensburg & Smit, 2004).

Stories, on their own, are therefore seldom regarded as sufficient evidence in evaluations. At minimum, triangulation of stories with other qualitative data or quantitative data is usually necessary. When participants provide accounts of changes, or intervention impacts, it is usually not enough evidence to claim that real change did occur. When an intervention can have multiple and varied impacts for different beneficiaries, stories are, however, the only real source of data that can give a sense of the scope of effects that the intervention may have contributed to.

Evaluators have found numerous ways of addressing the concerns about the credibility of stories as data source. Methods such as Appreciative Inquiry and techniques such as the Most Significant Change Technique draw strongly on stories told by individuals and address concerns about the legitimacy of the data through the process of data collection (Cooperrider & Srivastva, 1987; Davies and Dart, 2005).

The Impact Story template, which is introduced in this paper, is another attempt at working more rigorously with this potentially rich data source.

## The Impact Story tool

The Impact story tool is usually one of multiple data collection methods employed in an evaluation. It consists of a one page form that must be completed by beneficiaries, and is then verified by the evaluator, and analysed using an evaluation rubric. The form captures the details of a specific kind of story – A story about a change that occurred after a specific intervention was implemented. Usually participants are invited to volunteer stories of changes during a face-to-face interaction (an interview or meeting) and are then asked to provide more detail by completing the impact story form. In this way participants are free to volunteer salient aspects of a story during a first telling, and are then encouraged to think more critically about the story when they are asked to recount different aspects of a story.

### **Telling of the story**

The participant is asked to narrate the key points of the change story by explaining what changed, who was affected by the change, and why this change can be seen to be beneficial. The participant is also asked to relate how the intervention contributed towards the change.

### **Categorising the change**

The form asks participants to categorise the change in terms of categories that may have emerged from a logical framework. This allows the participant to decide whether the story is representative of any of the expected changes, or if it is an unexpected change. If this question is included prior to the telling of the story, it serves to prime the beneficiary to the factors that may be necessary to emphasise in the story.

### **Attributing the change**

Participants are then invited to indicate whether the intervention was partly, wholly or not at all responsible for the change. If there are various activity streams to an intervention, the participant is asked to identify which activity stream contributed towards the change.

### **Verifying the story**

In order to provide an opportunity to verify that the participant's account of a change story is accurate, the participant is asked to provide their own contact details, and those of another person that may be able to verify the story. An analyst may then verify the story, by interviewing the named individual, prior to starting with analysis.

### **Analysing the stories**

Besides reporting the stories as qualitative anecdotes, some quantitative analysis can also be done. An evaluation rubric is used to analyse the story. It distinguishes between verified and unverified stories, and may classify an impact as low level, medium level, or high level: Depending on the number of people that were affected, whether the impact was direct or tenuous, or whether the impact was a change in an individual's SKVAs (Skills, Knowledge, Values Attitudes), an individual's behaviour or whether it changed an organizational pattern. The impact level can then be brought into relation with the intervention activities and attribution level and can paint a useful picture of which changes the intervention contributed to.

## Example 1

In the evaluation of a coalition of schools, this was one of the stories shared:

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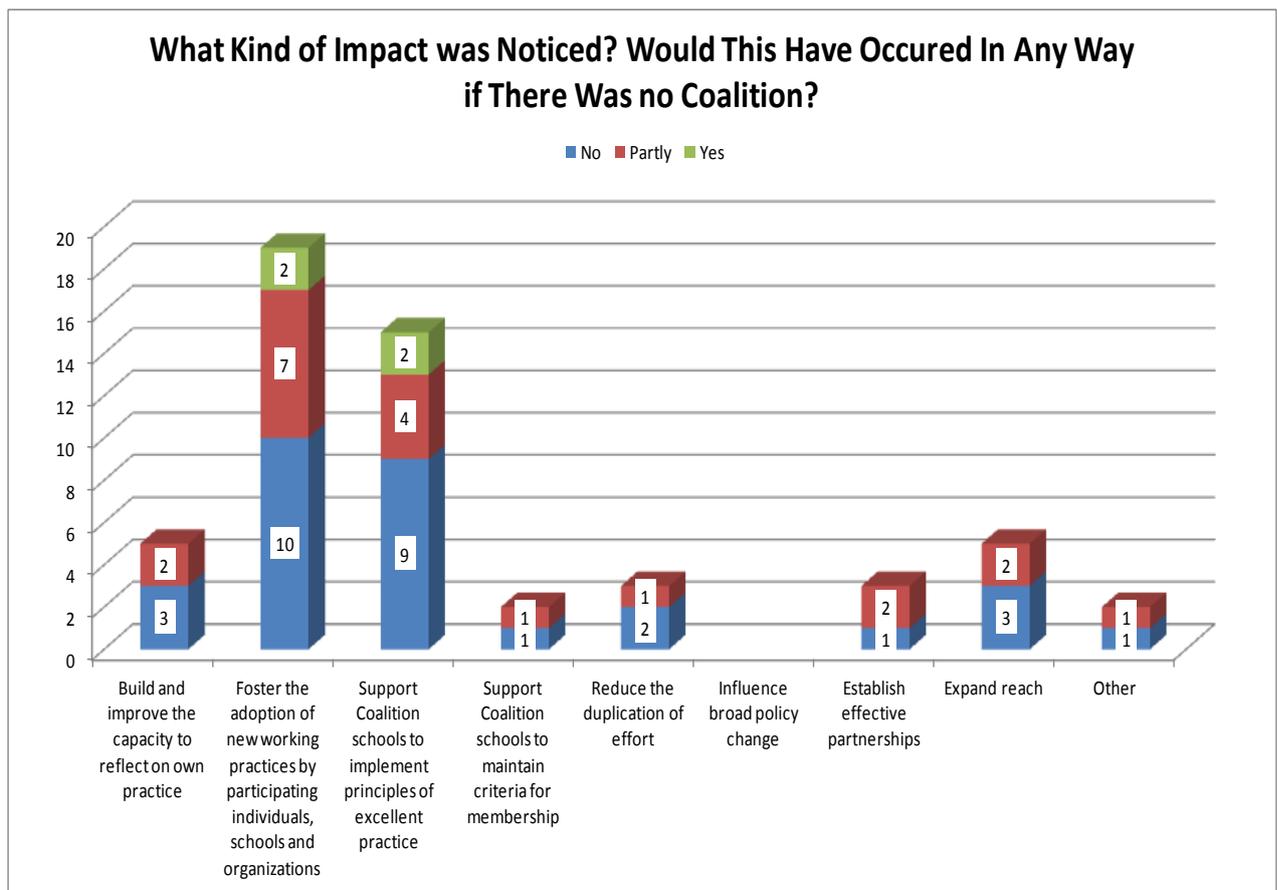
*Peer Review – the participation in this has been probably one of the single most valuable things that has happened to us through [the coalition]. Having staff members being part of a team has brought a richness to them and their approach within our school, and the preparation and receiving of a review has been a gift to our school and staff. It has already resulted in a more collective leadership approach and caused staff to reflect deeply on their teaching practice, their classrooms and their engagement with students. The privilege of being involved in the development of the instrument and going to the US to create it was an amazing opportunity - -not only the development of the instrument but the engagement with other coalition members and the journey travelled together there and my own personal growth. I have learnt so much more about myself – been encouraged to be bolder with difficult conversations and practice more constructive self-reflection.*

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For this coalition of schools it was possible to identify that “Peer Reviews” are a significant source of changes in participating schools, and that the coalition mostly had impacts on practices at school level

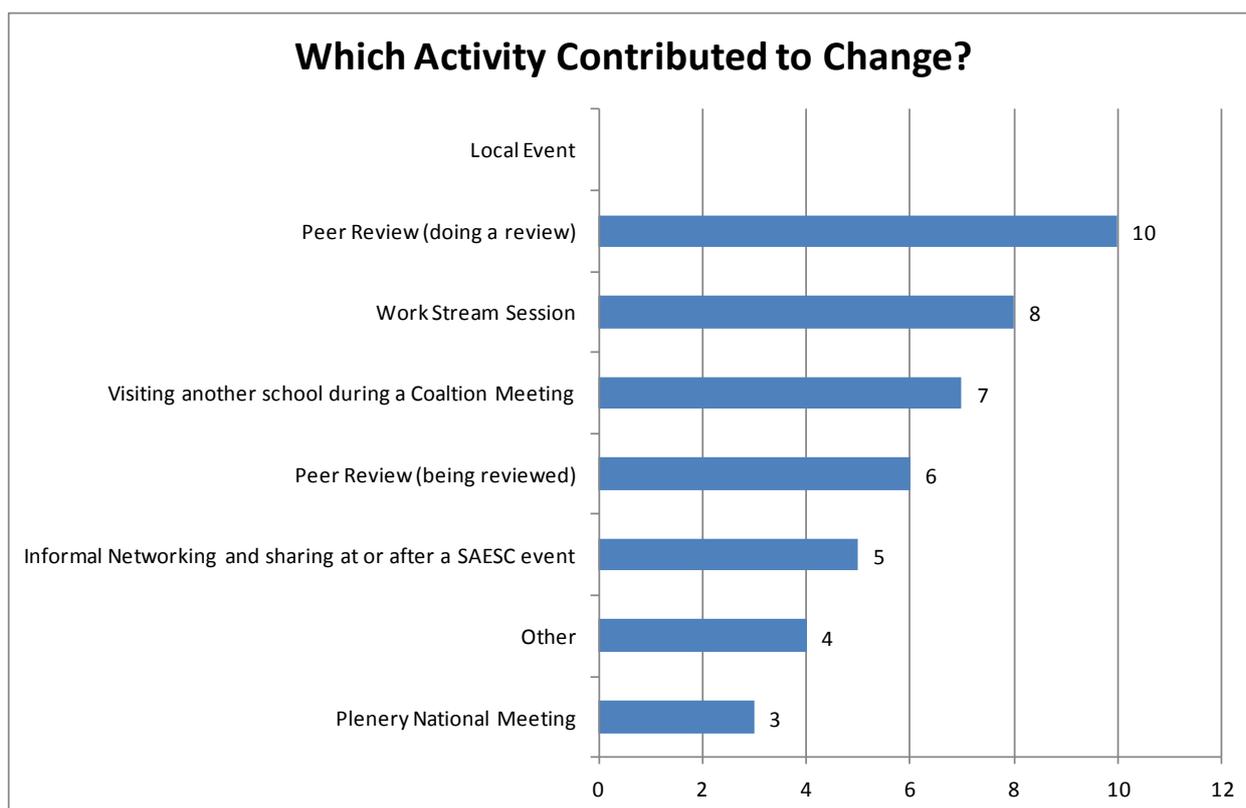
as opposed to influencing government policy. This made it possible to prioritise which kind of activities to continue with.

**Figure 1: Number of stories reporting change in each category**



The Coalition is seen to be most influential in ‘fostering the adoption of new working practices by participating individuals, schools and organization’ as nineteen stories have been analysed to support this theme and of those, ten noted that this would not have occurred had the Coalition not been involved. Another significant area of influence is ‘supporting Coalition schools to implement principles of excellent practice’ with fifteen examples - nine of these attributing the change directly to the Coalition. On the contrary the Coalition is yet to be influential in ‘influencing broad policy change’.

Figure 2: Activities attributing to change

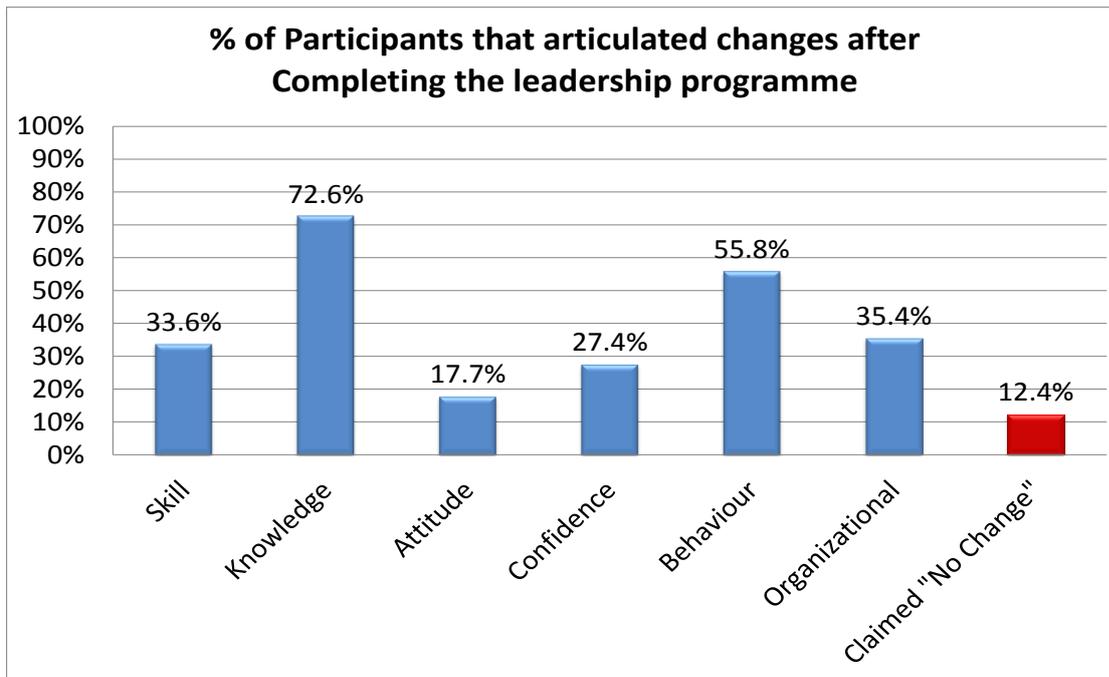


The graph shows that Peer Review - doing a review as well as being reviewed - contributed the most towards the impact stories as sixteen stories cited this as the activity contributing to impact. Based on these findings it was possible to recommend that the coalition seeks to increase the number of reviews conducted and the number of persons who participate in the peer reviews.

### Example 2

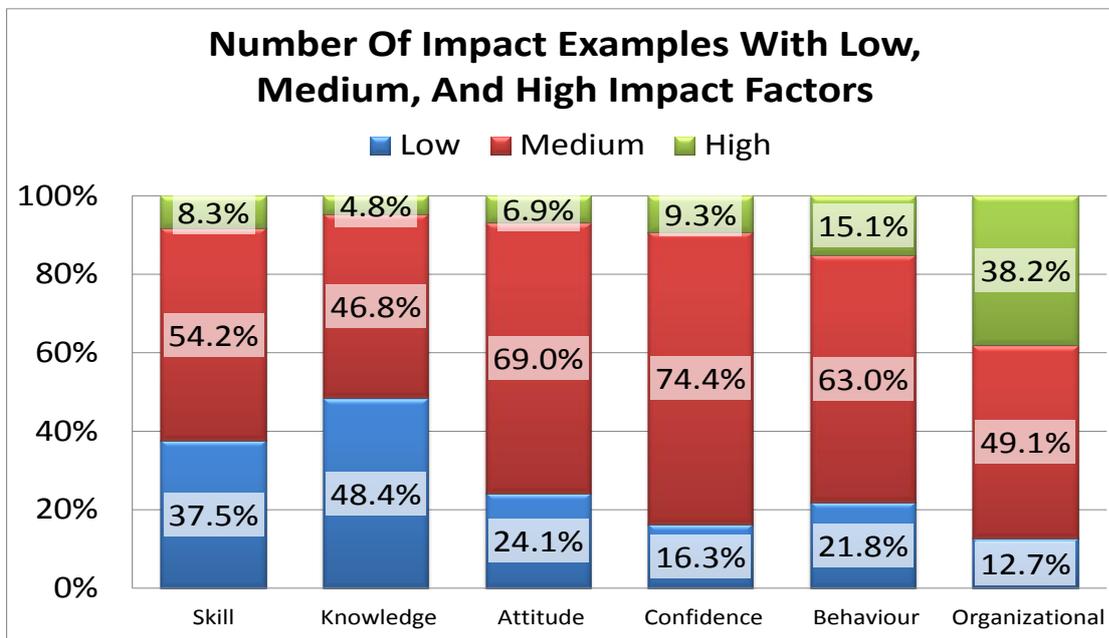
For the evaluation of a leadership training programme, it was possible to determine that most participants could mention at least one example of a knowledge change that resulted from the course, but that when behaviour or organizational changes were mentioned these were frequently high level impacts.

**Figure 3: Type of change attributed to leadership programme**



Most participants were able to identify specific knowledge changes— 72.6% of participants claimed they had more knowledge after attending the course. Exactly 55.8% indicated that their behaviour changed. A total of 35.4% gave examples of how they used the competence they gained from the course to implement changes in the way things are done in their organization. A total of 33.6% of participants could give examples of skill changes; 17.7% said their attitude was affected positively, and 27.4% claimed they gained more confidence after attending the course. These positive findings indicate that the course has the potential to bring about, at the very least, modest change.

**Figure 4: Level of impact**



The changes recorded, were mostly low or medium impact changes, indicating that the leadership course did not necessarily have huge measurable impacts for all participants. The changes which were rated as organizational changes, however, were more frequently high-impact examples – about a third of the participants mentioned organizational changes as a result of participating in the course, and about 39% of those changes were rated as “high impact”.

The two quotes below highlight changes in participants' thinking and attitude towards their work as confirmed by participants' supervisors. The two quotes below illustrate the impact of the programme in terms of its influence on participants' thinking and attitude towards their work.

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*"He does better [in his work] than [others] that have not done the course. I think it has helped him a lot in terms of professionalism and the way in which he is able to be in control of a situation."*

*"I think it's ... I don't know what words to use ... the way he thinks now; his viewpoint. You can have two good managers—the way that one thinks will make the one better than the other. Instead of moaning about the challenges they face, the one who has done the course will say: 'This is an opportunity—I can show everybody what skills I have.'"*

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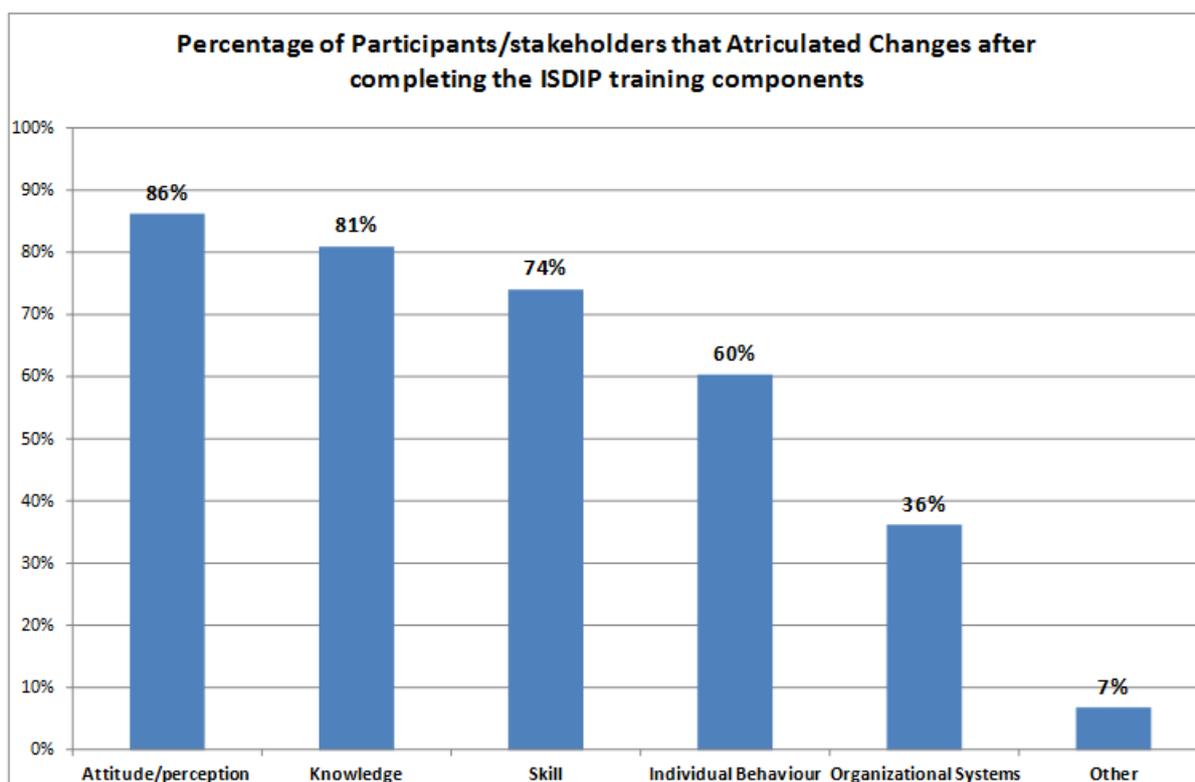
### Example 3:

For an evaluation of a programme that capacitates schools with action research, financial management and strategic planning skills, it emerged that most examples of changes related to the training aspects concerned with improving the school administration whilst proportionally more high impact changes could be attributed to the strategic planning training components.

**Table 1: Number of impact stories related to the different intervention activities**

<b>Project objectives &amp; training components/activities</b>	<b>Impacts/Changes Identified</b>	
<b>Nr</b>	<b>%</b>	
<b>Improving school management and administration</b>	<b>31</b>	<b>53%</b>
Action research	17	29%
Computer Skills*	1	2%
Financial Management	10	17%
Strategic planning	3	5%
<b>Improving teaching practice and learner performance in Science and Mathematics</b>	<b>13</b>	<b>22%</b>
Family Mathematics*	2	3%
Mathematical Reasoning	6	10%
Scientific Literacy	5	9%
<b>Improving teaching practice and learner performance in language and literacy</b>	<b>10</b>	<b>17%</b>
Language and Literacy	10	17%
<b>General</b>	<b>4</b>	<b>7%</b>
<b>Grand Total</b>	<b>58</b>	<b>100%</b>

**Figure 5: Percentage of Participants/stakeholders that articulated the type of changes after completing the training components**



Of the stakeholders/participants that completed an impact story form, 86% and 81% indicated a change in their attitude/perception and knowledge, respectively. About 74% of participants/stakeholders articulated changes in their skill and 60% in their individual behaviour, with only 36% articulating examples of changes at the organisational system level. Only four (7%) participants/stakeholders indicated there to be other changes with one participant/stakeholder specifying the 'other' change to be in 'collaboration'.

One example of a high impact change that resulted from the strategic planning training is provided below:

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*"[We learnt about] The importance of strict financial management. The importance of a policy regulating all financial issues. Basic bookkeeping, accounting skills. Control of petty cash. Budgeting. [We are] Starting to use basic accounting practises by using Journals for bookkeeping at school, and this is improving our capacity to plan and manage our finances properly."*

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### **The benefits and drawbacks**

The impact story tool introduces a more rigorous way of working with stories, whilst not being as resource intensive as the group processes required with the Most Significant Change Technique. The impact story tool encourages participants to articulate aspects of a story that could be potentially useful for the evaluation – This provides for snippets of the beneficiaries' voice to be heard in the evaluation report. It also enhances the analysis possibilities and contributes towards some standardisation across different beneficiary accounts. It starts to address the attribution question, and by verifying the stories, some more credibility can be attached to the evidence. It is possible that with this tool many differing accounts of changes can be captured and when there is some comparability, it allows for the possibility of many anecdotes together providing an evidence base that cannot be as easily dismissed as single anecdotes.

Although the impact story tool makes it possible to verify that changes actually occurred, it doesn't address all biases typically associated with anecdotes. For example: A beneficiary may be incorrectly attributing a change to an intervention or may remain unwilling to share examples of negative impacts. The actual benefit that may have transpired from a change can also not easily be quantified using only this tool. It is important, therefore, to employ the impact story tool in a thoughtful manner together with other sources of data.

## Conclusion

Working with stories in evaluation allows the evaluator to get a firsthand account of evidence that can be used to establish the impact that an intervention has had, as the evaluator has the opportunity to engage directly with beneficiaries.

Although stories cannot be used as an isolated data source, it is a rich source of data especially if it is collected and analysed systematically. An effective means of ensuring standardisation in the data collection process is by using a story template. Rigour in the analysis process can be enhanced with the use of an analysis rubric.

## References

- Cooperrider, D. L., & Srivastva, S. 1987. Appreciative inquiry in organizational life. In W. A. Pasmore & R. W. Woodman (eds.), *Research in organizational change and development* (Vol. I). Greenwich, CT: JAI Press.
- Dart, J. J. & Davies, R.J. (2005), *The Most Significant Change (MSC) Technique: A Guide to Its Use*, USA
- Henning, E.; Van Rensburg, W. & Smit, B. 2004. *Finding your way in qualitative research*.

**Impact Story Template – Use a separate page for each story**

During the coalition meeting, you shared an example of how the Coalition contributed towards an impact in your organization. Please fill in this story template with as much detail as possible and hand it back to any of the XXX staff, or email it to XXX. By completing this story template, you help us to record the information in a format that will be useful for evaluating the Coalition. Your comments may be anonymously quoted in an evaluation report.

**Question 1: Which of the following categories, best describe the kind of impact you noticed? (Mark all that apply with an x to the left of the relevant description)**

<input type="radio"/>	Build and improve the capacity to <b>reflect on own practice</b>	<input type="radio"/>	Foster the adoption of <b>new working practices</b> by participating individuals and schools
<input type="radio"/>	Support schools to <b>implement principles of excellent practice</b>	<input type="radio"/>	Support Coalition schools to <b>maintain criteria for membership</b>
<input type="radio"/>	<b>Reduce the duplication</b> of effort	<input type="radio"/>	Influence broad <b>policy change</b>
<input type="radio"/>	Establish <b>effective partnerships</b>	<input type="radio"/>	Other:
<input type="radio"/>	Expand <b>reach</b>		

**Question 2: Please narrate the key points of your example here again (Pay attention to WHAT the impact was, WHO was impacted, WHY this is an improvement (SO WHAT?) and how the Coalition CONTRIBUTED to it)**

WHAT?	
WHO?	
SO WHAT?	
COALITION's CONTRIBUTION	

**Question 3: Do you think that this impact would have occurred in any way if there was no Coalition? (Mark the relevant choice with an x)**

3.1  Yes  Partly  No

3.2 **What specific activity / aspect of the Coalition contributed to the impact being realised (mark the relevant choice(s) with an x)**

- Plenary at National Meeting  Work Stream Session  
 Peer Review (Being reviewed)  Peer Review (Doing a review)  
 Informal networking and sharing at or after an SAESC event  visiting another school  
 Other (Specify) \_\_\_\_\_

**Question 4: In order to verify the information, we may need to contact you at a later stage. Please provide the particulars below:**

Your Name & Surname:		Email:	
Your Organization:		Cell phone:	
Position:		Date	

**Question 5: Is there someone else that might be able to confirm this story?**

5.1  No  Yes (Please provide the details below)

Person's Name & Surname:		Email:	
Person's Organization:		Cell phone:	
Position:			

*Thank you for your time and attention to this task.*

**OFFICE USE ONLY:** Number: \_\_\_\_\_  
**Impact:** 1-5 Individuals, 6 – 30 Individuals, 31 – 100 individuals; Organizational; System Wide  
**Impact on Learners:** Significant, Tenuous, Not Applicable  
**Impact on Teachers:** Significant, Tenuous, Not Applicable  
**Change:** Value; Attitude; Skill; Knowledge, Individual Behaviour, Organizational Behaviour  
**Verified:** Yes / Partly / No / Not Yet