The "Real Book"[1] for story evaluation methods

May, 2012 edition. By Marc Maxson.
GlobalGiving Foundation (supported by Rockefeller Foundation)

About this book

This is a collection of narratives that serve to illustrate some not-so-obvious lessons from our ongoing storytelling pilot project in Kenya. We gathered a large body of **community stories** that revealed what people in various communities believed they needed, what services they were getting, and what they would like to see happen in the future. By combining many brief narratives with a few contextual questions we were able to compare and analyze tens of thousands of stories. Taken together, these **stories and their meanings** provide a perspective with both depth and breadth: Broad enough to inform an organization's strategic thinking about the root causes of social ailments[2], yet deep and real enough to provoke specific and immediate follow-up actions by the local organizations of whom community members speak.

We believe that local people are the "experts" on what they want and know who has (or has not) been helping them. And like democracy, letting them define the problems and solutions that deserve to be discussed is the best method we've found for aggregating that knowledge. Professionals working in this field can draw upon the wisdom of this crowd for understanding the local context, and build upon what they know. **Community efforts[3] are complex**, and our aim is not to predict the future, but help local leaders manage the present. If projects are observed from many angles – especially by those for whom success affects their livelihood – and implementers use these perspectives to mitigate risks and avoid early failure, the probability of future success will be much greater.

About GlobalGiving

GlobalGiving is a nonprofit foundation that runs a website (www.globalgiving.org) that serves other nonprofits around the world. Our mission is to help other organizations be more effective. Dennis Whittle and Mari Kuraishi left the World Bank in 2001 to start GlobalGiving because they believed they could build a better system for aid delivery and support innovation in the process. We provide over two thousand NGOs with the tools and training to raise money from a lot of individual supporters, in effect building a stable support network that sustains the work. We would like to lower the cost of evaluations and increase the likelihood that information drives smarter decision-making – which is what this storytelling project is all about.

Sharing and copying this book

Yes! Share this PDF. You may print and share it as is, but you cannot sell copies. If you only want to copy excerpts, please let me know. It helps us refine the material.

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[1] Real book: The Real Book is a central part of the culture of playing music where improvisation is essential. Real books are not for beginners: the reader interprets scant notation, and builds on her own familiarity with chords. The Real Book allows musicians to play an approximate version of hundreds of new songs quickly.
[2] Irene Guijt: Not only social ailments – but constraints on progress in general or development constraints.
[3] Community effort: a clunky phrase we use for any organized service or event by something or someone to help a larger set of somebodies in a time and place – AKA NGO work.

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Part I: How this method evolved

"Is this the right road?" Milo Asked.
"I don't know of any wrong road…" he said, "and if it isn't then it must be the right road to somewhere else, because there are no wrong roads to anywhere."
-from the Phantom Tollbooth, p18.

Outline of Part I:
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1.1 Overview
Agile Feedback Loops are essential to managing the problems we encounter.

We began the storytelling project after a journey in which we tried to deal with a small community based organization (CBO)[4] in Kenya that wasn't serving its beneficiaries well. We were supporting hundreds of other organizations and really did not have the resources to solve the community's problem. But we persisted because the community was engaged in the process and volunteers appeared out of the woodwork, went to Kenya to help the CBO, and guided the conflict resolution. When all was said and done, we spent a lot of time trying to salvage this one organization, and we probably didn't succeed. But our process – gathering feedback from a variety of perspectives and sharing them with all people involved – was something that seemed to work. How, then, do we scale this approach to make all the organizations in the world more effective? How do we help our network tune into the change happening in their communities?

Luckily for us the Rockefeller Foundation took an interest and gave us some money to run a pilot focused on new methods to support community- and complexity-based evaluations. A complexity-based

> **Summary Box 1:** We deemed these elements of evaluation to be important:
> 1. **Dynamic information** – changes in community services and attitudes quickly come to our attention.
> 2. **Multiple perspectives** – change looks and feels different to various people within a community. We wanted to hear about all sides of an event, in case one-sided reports were misleading.
> 3. **Conversations** – feedback loops connect the community and orgs, so that they can both make informed decisions.
> 4. **Community control** – it is easy to ask people what they think, but they won't tell you anything if they're not convinced problems they **raise** will be addressed, and projects they **praise** will be sustained. We found it simplest to give the community some direct power. These include:
>   o **Exclusivity** – ability to remove a local org from GlobalGiving.
>   o **Allocation** – locals can determine where some money goes, choosing from among local orgs.
>   o **Voice** – ability to influence all funders through their frequent and public feedback.
> 5. **Trust** – Works both ways. If donors trust the community and give them some control, they will work to improve and sustain local community efforts.

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[4] http://blog.globalgiving.org/2009/09/16/we-are-listening-real-time-feedback-loops/

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framework[5] provided us with the language we needed to explain to others what we were seeing. The framework also gave us confidence that we were analyzing the situation realistically. Truth belongs to many people, changes continuously, and is heavily shaded by each person's incentives – and the sum of these factors mean traditional program evaluations miss most of what is really happening.

Summary Box 1 lists the most important elements of the sort of monitoring system we needed. Here our thinking begins with designing a system around the right inputs: rapid feedback, multiple perspectives, conversations, and mechanisms that give the community control over funding outcomes. This last element is crucial for building trust and aligning incentives with the outcome.

I call this an "**Agile feedback loop**," modeled from the **Agile Software Development**[6] philosophy. Agile systems achieve incremental improvements through iterative user testing. By analogy, Impact is built on layers of incremental success, achieved through listening and adjusting community efforts as they happen. Trends about success or failure are built on a large collection of short stories about community efforts.

That is why we needed a different kind of evaluation system. We often operate under less-than-ideal circumstances, partnering with tiny organizations, where comprehensive impact evaluations don't fit and are prohibitively expensive. There are some four million of these organizations in the world, running the lion's share of schools, orphanages, and charity work. Currently, few do any form of evaluations, and nobody else is sharing outside evaluations with them.

The story-based monitoring method we describe here provides reasonable information about what is working, insights into the root causes of complex social problems, and it can be implemented for about 5% of what traditional methods cost, when applied across a NGO network. Even more, we can refine this process by delivering feedback to local partners and judging its usefulness by their reactions. Stories have no value until other people read them, and some people use them to make decisions. If partners are using these stories then we know we are providing something of value to them that can fill the information void in which many institutions are operating.

1.2 Making the transition from evaluations to Agile feedback loops
Agile feedback loops are better suited to supporting a network of NGOs. They require continuous collection of information with an open-ended prompting question. But what's the right question?

We encouraged people to narrate a brief story about any local organization **they chose** and answer some follow-up questions. Already, you might recognize this as the opposite of an evaluation. The storyteller chooses the subject and fills in the survey with information he or she deems important. Though GlobalGiving may only work with a fraction (typically 7%) of the organizations named in stories, the remainder will still be useful for **conceptual evaluation** (explained later). We also encourage

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[5] Dave Snowden of Cognitive Edge explains the Cynefin framework:
http://www.youtube.com/watch?v=N7oz366X0-8
[6] http://en.wikipedia.org/wiki/Agile_software_development

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each storyteller to share **two stories** about two different community efforts; this helps us track bias and sample diversity later.

Evaluations	Storytelling
Narrow scope, closed list of projects / organizations	Open-ended – all projects
Organization defines the focus	Storytellers define what themes **emerge** (when many people share the same idea independent of each other)
One snapshot in time	Continuous collection
Organization selects the interviewees	Group of 3rd parties (scribes) choose the storytellers
Relies on **random sampling**	Iterates towards a **diverse sample** using quantitative bias indicators
Limited to specific measurements and a priori hypotheses	Can propose any question to the data regardless of whether it was considered before we started
Specific framework aimed at measuring data related to clearly defined outcomes	Universal framework to codifying story elements
Generally not comparable with previous surveys (unless questionnaire remains same)	Data has long shelf life, and allows for time trends
Generally not comparable with other organizations' evaluations	All analyses provide three reference data sets: (**time** - pre and post intervention; **within group**: compare org-stories against each storyteller's 2nd story; **external**: compare similar project / theme against another organization's project)

These contrasts provide the justification for switching from an evaluation mindset to a continuous monitoring one. At scale, storytelling monitoring is cheaper and more relevant to a wider group of organizations, but at a cost of having less detail on any one organization's specific project.

We chose one main story-prompting question, and it needed to be **broad**, not specific to any organization, so that anybody could answer it. It needed to be **an anecdote** – just one incident along a time line. Anecdotes provide more specific details about an organization than testimonials do, and specific fragments are essential in building patterns during analysis. The question also needed to direct people to fill in several aspects of the story, such as **what happened** and **why?**

Since 2010, we've been using this question: **Can you tell us about a time when a person or organization tried to help someone or change something in your community?**

This is the broadest question we could think of that would capture all community efforts. This question works at any time, so that we could start **continuous collection** of stories. Adding (…that happened in the last 3 months.) to the end of the prompt is a helpful constraint once we are collecting continuously – so that we can look at time series in stories. Otherwise, adding a question about when the story took place

suffices. There is nothing magical about this question. Any open-ended question that elicits a set of anecdotes will work to allow crucial themes to emerge, so long as every story can be categorically related to the rest. Other examples of effective prompting questions (allowing themes to emerge) are:

- Why do you stand with the 99 percent?
    - (See: http://chewychunks.wordpress.com/2011/10/22/1-percent-who-stand-with-the-99-percent-more-meta-analysis/)
- Please tell me a story about a time when you either witnessed or experienced stigma that has happened recently.
    - (See: http://chewychunks.wordpress.com/2012/02/29/from-survey-questions-to-prescriptive-answers/)

1.3 Building community partnerships as the entry point for collecting stories
You must have a network of local people who trust you and who are trusted by the community for this story method to work.

This storytelling method is about collecting anecdotes on a massive scale, so that patterns can emerge. In February of 2010 I started writing to all of our GG partners in Kenya and explaining what we were trying to do. There were over 50 partners but we knew from past experience that only a dozen would probably play a big role. This community follows the $^{80}/_{20}$ rule of any social network: 80 percent of the people are silent observers; the remaining 20 percent do 80 percent of work.

We contacted local partners who could host training events or connect us to other local institutions. About a dozen responded, and 7 organizations contributed. We held 3 workshops to meet with 120 new organizations interested in joining GG where we introduced the storytelling project. By 2012, GlobalGiving had over 500 organizations in Kenya and Uganda, but only about 20 were active partners, but about 1000 named organizations in stories. The lesson is that you need a broad network of local partners or a stronger incentive than just free information, If you have a small network, engage with us or someone else who has a larger one.

Organizations that have never received funding through GlobalGiving were just as reliable as our fundraising partners when we need to recruit local young people who can serve as scribes – story collectors. When you approach any local partner, clearly explain:

- Why are you collecting these stories?
- How will it benefit the community? (What's in it for me?)

Trust
Building trust is certainly something you cannot do quickly, but is easy if you listen to them for several years and do your best to serve them well, as GG has done. This is my biggest concern for others who might try to copy our story model but overlook the importance of community partnerships. If you are a government agency with no existing relationships with local organizations, much less local community members, you are better off finding a partner who has an existing network – like GlobalGiving. Even we follow this rule. We have a strong network in Kenya and Uganda but if we wanted to work in the Democratic Republic of Congo (DRC) – where we have only a dozen organizations, we would search for a partner.

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Honesty

It was amazingly helpful to be able to be totally honest with our partners in emails about the process, rationale, and intentions[7]. Because our mission at GG aligns with most organizations' missions, most partners were supportive. But time and attention to this project come at the expense of other priorities. Many simply lacked time and resources to commit. The most common concern was a lack of clarity about how these stories would lead to specific, tangible conclusions and actionable results. Over time, as we delivered more information back to them, they became more willing to contribute to the effort.

Immediate benefit

Storytellers and collectors alike did not understand how telling stories could change anything in the community. I didn't promise much, and avoided false promises[8], but I did promise them that all stories would be public and accessible.[9] This alone seemed to be more than some of them had been promised in the past. Since then we've faced some unnecessary hurdles in getting stories back to the community members themselves[10], but our goal (provide an immediate benefit to the storytellers) is still in sight. By 2012 we had a variety of web and text-message-based (SMS) tools to allow anyone to search the stories without Internet. Few people have used it.

Even before the first story was collected, our partners asked us to predict what these stories would reveal. Others asked us if this just another way to build feel-good content for our website? Over the year of back-and-forth iterations with these organizations, we've eventually turned the question around: What do you need to know about your community? Feedback is only as good as what you know you don't know. We've provided several web-based tools and have started hosting community feedback meetings.

1.4 Technology and Story Collection
Design for people with access to the most basic technology, or eliminate technology from the equation altogether.

Prior to arriving in Kenya, Dave Snowden[11] encouraged us to try various high tech tools that would facilitate story collection. He talked about using a special pen that records what you write in memory and synchronizes it with audio recordings (cost: $300). He said they were nearly ready to roll out surveys that could be collected using

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[7] This contrasted with a very similar project we tried elsewhere. Because it was a randomized controlled trial (RCT), we could not be completely honest about the whole project. NGOs are our partners, our implementers, our analysts, and our decision makers – people who must understand why before they do something. The need to keep subjects "blinded" disrupted the fragile incentives organizations had to promote the feedback program.

[8] A common outcome many partners wanted to hear me predict is, "if you participate, donors will read your stories and donate more money." If this does happen in the future, it cannot be predicted today.

[9] Note: Making data "Accessible" doesn't mean a thing if people are not told explicitly how to find it. "Accountability" is more than providing open access to data. Our ideal - "Authenticity" – is making our data not only public, but also traceable back to the source so that others can determine whether it is reliable.

[10] Only about 300 of 2000 storytellers provided a local phone number in 2010, and a good number of these were inoperable. In the future we must find some kind of instant number verification to complete the feedback loop. On 10-12-2010 we were able to send 4 text messages back to all the story collectors, thanking them, connecting them to a public story repository website, giving them a $10 GG giftcard they could use to allocate money to any existing or future partner organization, and explaining how to redeem the card online or with the help of our local Kenyan coordinator.

[11] Founder of www.Cognitive-Edge.com

an iTouch. This sounded alluring because the iTouch has a colorful touch screen and anyone can place a finger in the triads to mark their preference (cost: $200). Likewise, other technology vendors offered custom solutions on phones that required either (a) smart phones, (b) replacing the user's sim card[12], or (c) web enabled phone features[13]. We planned for our main option to be hosting a website that anyone with a computer could use to enter their story and complete the signification survey[14]. Overall, these technologies were not cost-effective and introduced new problems into the project, such as:

- Worrying about stolen equipment
- Raising the required tech-literacy in order to participate, which would require training
- It would limit story collecting to places where people would have access to technology.
- Knowing who our people will be before we start (for any phone-based sampling)

We started the first story collector training session at HotSun Films[15]. We had three laptops, 2 GSM modems, a whiteboard, and an entire professional editing lab of G4 PowerMacs in the next room. I did a chalk talk and handed out papers while Zipporah, our storytelling project coordinator, worked with their technicians to try to get the GSM modem connected to the Internet. After 3 hours of trying and several calls to Orange and SafariCom, nothing was really working. The web form was a failure because technology – even at one of the most technologically advanced film schools in Nairobi – under the shadow of downtown skyscrapers – was the problem. I was frustrated that we couldn't use a computer to collect data unless it was running the Internet, when we didn't really need the Internet. Subsequent trainings went better because we avoided computers altogether, and switched to paper. Even when a computer was available, we still needed a scribe to help others enter the web form.

The easiest approach was to collect paper surveys and send them to a central point for transcription.[16] Even by 2012, the adoption of smart phones was too sparse to justify doing anything other than paper or SMS-based collection. We are planning to experiment with SMS (text message) collection in 2012, but there is a trade off. Some storytellers will not pay to send a text, and the stories will be shorter, with less structure in any meta-data.

1.5 SenseMaking and the Signification Framework
We ask specific questions about ambiguous elements of stories so that we can parse stories into interesting sub-sets.

The SenseMaker® software from Cognitive Edge[17] requires that every story be associated with a set of structured questions, called a signification framework. These

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[12] Example from an experiment using mobile cash transfers: http://www.odihpn.org/report.asp?id=2936
[13] EpiSurveyor: http://www.episurveyor.org/user/index
[14] Others have worked with schools to provide access to a survey like this, but it did not work for us.
[15] http://www.globalgiving.org/donate/1433/hot-sun-foundation/
[16] Imported technology can be a crutch. In 2003 I arrived in West Africa on a Fulbright to do a 6-month survey of computers and Internet in rural areas with 8 of my own laptops. It made a little difference, but using what was available led to much more meaningful insights.
[17] http://www.sensemaker-suite.com/

questions can be multiple choice format or a triangle with labels at the corners, used to codify aspects of the story that are inherently ambiguous or the subjective interpretation of the storyteller:
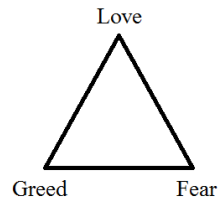

Box 2: Signification Framework Triads focus on the ambiguity in stories. Fuzzy questions combined with answers that allow for fuzzy, intermediate responses along scales allow the storyteller to recode a story's meaning along different reference frames, providing new information.

Each storyteller places one dot in the triangle. When all story dots are superimposed using the software, overall patterns appear:
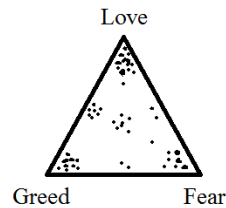
A cluster of dots represents a cluster of stories with a common element. If that element is germane to some hypothesis about the work of NGOs being talked about in stories, then that *reading* that cluster of stories can provide insights about the NGO work that would be outside of any predictable set of survey questions. The clearer the similarities in this set of stories, the more likely these stories represent reproducible aspects of the phenomenon that they describe.
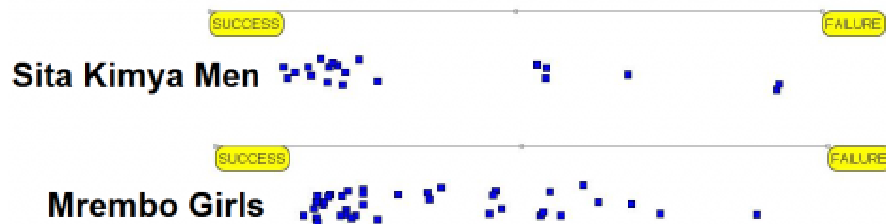
For example, in 189 stories that mention "child abuse" or "child labor", 29 are from 'actors' – the storyteller played a role in the story. Of these stories from 'actors', ten (one third) are from girls under the age of 16:

Text from two of these stories:
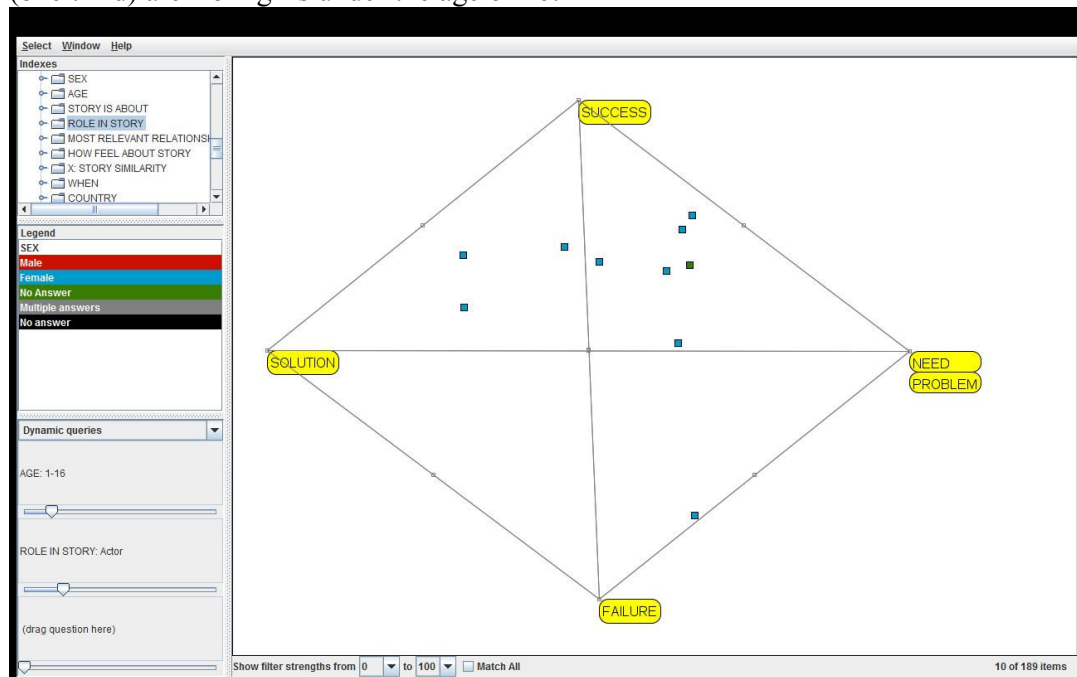
"We had Mrembo Programme which had taught us more about how to cope with day to day life skills.During that time, I didn't know more about it but when they came, I knew more about early marriage. I knew that if you are under 18 years, you are not supposed to get married.This is child abuse. In this age we have to be concentrating on education because marriage is not acceptable in our age. They helped me because I didn't know even the problems caused by early marriage, so I knew even that early marriage may lead to dropping out of school, early marriage and even lack of self happiness."

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"i was not new who are my right has a child but when the organization come and told us how we can new our right so i new may right has a child but now i new who to example child abuse so i new if some has tach you on private part that is child abuse then if some one repo that is child abusei fill happy to know my right"

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You can read the full analysis is online[18].

Contrasting, or comparing relevant story clusters to a reference set of stories is also a powerful way to see what is emphasized or absent. The Mrembo ("beautiful girl") project mentioned in the child abuse story was similar to another project called Sita Kimya ("we will not be silent!"). Since we collected several hundred stories about each project, we could do a head-to-head comparison of words found more often in one set or another[19]:

Demographics were the opposite – as Sita Kimya target men and Mrembo targeted girls:

Both shared mostly stories about success. Below: worlds that Mrembo stories emphasized, with overlapping words from Sita Kimya stories subtracted out:

And the converse (Most common words from the Sita Kimya stories displayed, with Mrembo words removed):

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[18] http://chewychunks.wordpress.com/2011/11/16/kisumu-community-feedback-focuses-on-conceptual-evaluation/

[19] http://chewychunks.wordpress.com/2011/07/25/comparing-two-rape-prevention-programs/

What this **differential wordle** approach reveals is that while both programs talk about rape, there is an absence of association between rape and the spread of HIV in the Sita Kimya stories.

1.6 Improving the Signification Framework
Finding the right questions to frame story analysis is an iterative process.

Irene Guijt[20] consulted with us to develop a signification framework[21] that would apply to our network of organizations in Kenya. Dave Snowden of Cognitive Edge also helped. He had used this approach with interactive museum exhibits, to improve organizational management, and with military intelligence, but never in an international development context. Irene was keen to know what GlobalGiving needed to learn the most. This was more challenging than we thought.

To answer that question, I looked back at the focus of our past evaluations, which had changed yearly. Since 2005, we have focused on measuring organizational learning, quantifying outputs to estimate impact, community involvement in project management, and understanding the system of controls to promote financial accountability. It wasn't clear which of these foci helped our organization make better decisions, as there was a disconnect between evaluations and operations that is typical of all organizations.

In 2006 our evaluations focused on the communication chain from donor to project sponsor, organization, and down to beneficiary. In some cases, our evaluator (Keystone Accountability) found that local implementing organizations did not even

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[20] Irene Guijt is an M&E consultant (http://nl.linkedin.com/pub/irene-guijt/6/826/213)
[21] A Signification Framework consists of several questions with answers along multiple scales one can use to extract meta-trends about story themes that relate to projects managed by organizations. The **SenseMaker®** software uses concise questions with two or three categorical answers placed at the ends of a line (polarity) or points of a triangle (triad). The signifier (storyteller) chooses a spot on the line or in the triangle representing the degree of each answer contained in his story. Triads intentionally use ambiguous categories to force the signifier to recode a story's meaning along different reference frames, providing new information. Analyzing these triads provides visually clear trends and clusters within stories that NGO staff can use to then probe (by reading clusters of stories deemed a potentially significant pattern) to answer a larger set of questions.

know about the money they were receiving from Globalgiving (though they did appear to be receiving it). The intermediate sponsor organizations were not relaying messages about which funds went to which projects. Since then we have mostly cut out the "middle man," but this shift was prompted by evidence of how it affects our bottom line (fundraising effectiveness) and not just because of the impact evaluations. We didn't even ask the question in 2007 because we already knew it was a problem, and couldn't solve it at the time. This is essence of iterative evaluation design; capture new and useful unknowns. But knowledge alone does not lead to change. The real decision happened when we *noticed* that implementing organizations promote their projects better on GG and raise more money when we work with *them* directly, and so we started searching for more local partners who could work with us directly. This example illustrates that evaluations usually do not trigger behavior by themselves, but are more often used to justify decisions made by other means[22]. I continue to wonder what *systems* would have helped us make the right decision sooner, as it is a fundament aspect of making our storytelling project trigger actions within the hundreds of organizations that may one day be using the data.

We debated several versions of the story "signification framework" and agreed to a design where community members would be invited to share a story about one **community effort**[23] they saw or knew about. For each story shared, we wanted to know:[24]

1. What was the core goal of the community effort? (physical well-being, social relations, economic opportunity)
2. Who benefits from it?
3. Who influences it?
4. Was it a success, a failure, or is the outcome unclear?
5. Were community attitudes about the effort in your story united, divided, or indifferent?
6. Was this community effort too disruptive, or not sufficient to change things?
7. Were outsiders too meddling or too absent?
8. Was decision making process too authoritative or too deliberative?
9. Was your story more like a cautionary tale ("my story is about an effort best avoided at all costs") or a fairy tale ("my story is too good to be true")?

In this first draft you can see a strong emphasis on organizational governance. These questions had emerged after a series of iterations with Irene suggesting key issues for GG based on her readings of our existing materials. We were convinced at the time that these questions would serve our purpose. I present the first draft of the signification here because I want to highlight how our thinking changed during the project.

Sumi-e[25]
Whereas most M&E processes employ many, many questions, variables, indicators and evidence collecting, developing a signification framework is like a *sumi-e*. This

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[22] See *Obliquity: Why our goals are best achieved indirectly* by John Kay for a chapter on this subject.
[23] "Community effort" was a phrase we developed later, because there is no good word for NGO projects within a community yet.
[24] The actual surveys are in the appendix.
[25] Thanks to Irene Guijt for introducing this concept and section

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Japanese technique of rice paper painting forces the artist to see objects and distill them to their essence, using the fewest possible brush strokes. Refining this questionnaire involved stripping questions to essential 'need to know' elements.

Alfred Hitchcock's famous logo is like a *sumi-e:*

Certain questions were immediately dropped because they confused most of people we tested it on in Kenya[26] (e.g. question 9 above). The second draft shifted focus away from items the typical community member would not know about (incidentally, most of the foci from our earlier evaluations) to universal questions that allowed us to better map the community work in its local environment.

Second draft questions:
1. What is the core goal of the effort? (physical well-being, social relations, economic opportunity)
2. What core goal was missed in the effort?
3. Who Influences the effort?
4. Who benefits from the effort?
5. How united/divided/indifferent are community attitudes about the effort?
6. *(added)* What advice would you give a friend from this effort?
7. Was this story about an effort that succeeded or failed?
8. *(added)* How essential was the NGO to the effort?
9. Your story relates to… (chose up to 3 of 12 topical themes)

This set of questions has gone through about 15 revisions. Five of those versions were tested in the field, and 3 versions have thousands of responses each. This is the current draft (2012):

1. Your story describes a (broad need, specific problem, specific solution)
2. Your story is about (social relations, physical well-being, economic opportunity)
3. Your story describes a (good idea that succeeded, good idea that failed, bad idea)
4. Who benefited in your story? (right people, wrong people, nobody)
5. This story makes me feel (happy, hopeful, inspired, indifferent, disappointed, frustrated, angry)
6. Your connection (I helped make it happen, I saw or heard about it, I was affected)
7. When did it take place?
8. Where did it take place?
9. What organization is it about?

And this is the ***sumi-e representation*** of that draft (i.e. the most useful elements of all stories for analysis and pattern detection):

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[26] Rule of thumb: 30 subjects is a good test pool size. Also, always test your questions in the same culture you intend to study.

1. The **what** is contained in the actual story.
2. Story about (**social** relations, **physical** well-being, **economic** opportunity)
3. Idea was (**good, bad**)
4. Who benefited? (**right people**, **wrong people**, **nobody**)
5. Your connection (**actor, observer, beneficiary**)
6. **Where** did it take place?
7. **Who** is it about?

A copy of the paper survey appears in the appendix.

1.7 Logistics and scaling up
Choosing the right signification questions will require testing. Don't cut corners here!

Scaling up story collection
Once the revised signification framework was represented on the web forms and in new printed papers, the real experiment began. In April 2010 I held daily trainings for a dozen potential story collectors at a time in four parts of Kenya (Kibera, Kamukunji, Eldoret, Kitale). We didn't choose these sites; they chose us. That was where our interested partners worked. We had longstanding partners in Mathare, Kisumu, Mombasa, and elsewhere but none of them took our offer, so we didn't work there. Over the 15 or so trainings, I introduced the idea to about 120 young people and we retained about 50 collectors who each turned in at least a dozen stories from their peers. In 2011, we scaled up this approach with a standing offer to train scribes at any point throughout the year at any location in Kenya or Uganda where at least 12 people were gathered to learn. By the end of 2012 we had stories from between 12,000 and 17,000 storytellers (hard to know exactly when storytellers declined to write their phone number on the story forms – used as a unique identifier). This training of collectors approach works and can scale in time. Having a simpler survey also improves adoption.

In every case, it took over an hour to explain what we were doing and why they should participate, because (a) we began with no public interactive website to display stories that had already been collected and (b) it took some time to discuss what it was we were asking them to do. In 2010 partnering with *Map Kibera*[27] was extremely helpful for demonstrating that very basic information can be shared using the Internet and phones. In 2011 we had all stories online and connected to a search engine[28], so explaining the purpose and outputs took half as much time per training. We'd advise others to bring one laptop and demonstrate our existing storytelling project to others in order to explain the purpose.

Over 1000 stories came from a single day event in June. TYSA, a community based organization in a very rural area outside Kitale, organized a village *baraza*, or meeting where people talk about what has happened in the last year and pledge to support continue work in the future. This was a planned annual event and TYSA's ingenuity was to incorporate the storytelling project into their stakeholders meeting. Of the 1000

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[27] www.voiceofkibera.org
[28] www.globalgivingcommunity.com/search2.html

stories, 140 dealt directly with the work of TYSA itself. Of the 2530[29] stories transcribed for the story project overall, 230 dealt with GlobalGiving partners.

Transcribing stories

If March-April felt like pushing a boulder uphill, May-June felt like trying to stop a boulder rolling downhill. For other organizations and community members, seeing people within the community taking part in the storytelling project was confirmation that it must be worthwhile. (Well, that, and word got out that we were offering $10 for each 20 stories submitted. This incentive was later reduced from 50 cents to 15 cents per story in 2011.) We stopped rewarding story collectors on June 15th and it took nearly 3 weeks to transcribe these stories. We had trouble finding enough good, competent transcribers to hire in 2010, so we hired Horizon Contacts Centers[30] to manage transcription in 2012 and were very impressed with them.

We also realized that thinking about **two types of user experience** could improve data quality. We were using a web interface designed for the casual storyteller who might navigate through the form once or twice. In reality, our transcribers were doing serial data entry, and had to navigate the same form repeatedly. We experimented with transcribing all the stories into a spreadsheet for mass uploading, but that didn't work well either. In the future having a method of bulk data entry that does not require Internet access would facilitate this project.

Scribes are more cost-effective

As a person who laments the lack of transparency in what things truly cost in the NGO world, I provide you with this information so you can make an informed decision about you might structure your storytelling project.

Talking with partners, we learned that the going rate for NGO professionals in Kenya was $300-500 a month. We couldn't afford to hire more than one of these, but we could afford to hire a huge number of very part time workers for specific tasks. If we consider story collectors a type of micro-evaluator, and $10 bought 20 stories and took about 5-20 hours of work (depending on whether the story collector convened group sessions or worked 1-on-1 with storytellers), then our $1200 hired about 50 collectors to gather 3000 stories at a rate of $0.40 per story, representing a total of between 250 and 1000 hours of work. The wages to local staff, story incentives, and transcribers for the fieldwork totaled about $15,000. Outside consultants and software licensing actually was the largest expense, coming in at about $40,000. In 2011 our cost-effectiveness improved, as we collected over 36,000 stories that year through about 2000 scribes each earning 15 cents a story. Each story cost about 35 cents in direct costs (scribe incentive, photocopying, transcription, mailing, and mobile payments). Staff salaries and developing the technology that we integrated into our website cost much more. As a do-it-yourself method that used our shared back-end database, the scribes method could provide tens of thousands of stories each year for under 50 cents a story. Cost savings come from sharing the data processing and management technology, and having it feed into analysis tools that many people use.

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[29] Several hundred stories were probably lost during the chaotic transcription process that followed rapid collection. Such is the nature of low-cost paper-based solutions – we never expected to receive 100% of the data. We expected only 80% of the data to be useable. To our surprise, 91% of what was transcribed (2637 stories) was complete enough to be useful. Our transcribers were instructed not to transcribe stories which were irrelevant or extremely brief (e.g. "I was hungry and ate ugali for lunch.") and had no other survey data attached.

[30] http://www.horizoncontactcenters.com/

Localization

During collection, we provided both an English and Swahili version of all web/paper forms and allowed people to choose the language. Kenya may be unique in this respect, but our efforts at localization (providing Swahili worksheets and web forms) were wasted for one unpredictable and extremely practical reason: Most people prefer to speak Swahili but write in English, because English sentences are shorter to write. More than 95% of stories came in English. I suspect that repeating this project in Tanzania would require Swahili forms. You must decide which language is most practical for your local context. Some aspects of the form do not need to be translated (such as the triad dots or pictures to represent an idea) and would be helpful where language is a barrier.

Part II: Analysis

We want a system that identifies what organizations have learned from the stories and what specific follow-up actions they can take.

Outline for Part II:
2.1. Example of how one organization uses the stories: TYSA
2.2. GlobalGiving's use of stories
2.3. Djotjog Mapping
2.4. Instavaluations
2.5. Conceptual Evaluation

We face a big challenge of analyzing these stories. We want them to yield specific, actionable lessons to the organizations in the community. This process is still ongoing, as it should be, and like art or literature, will hopefully spawn many rich discussions and multiple, competing interpretations. The kind of analysis we are aiming for is **not one overall set of lessons**. The data set is too rich to be reduced that way. We aim to entice story analysts[31] to search the data for specific answers within a local context and relate it to what they care about. This is where the storytelling method diverges from the **Most Significant Change (MSC)[32]** method. MSC prompts storytellers to share stories about significant changes happening, then reduces this data by committee and stakeholder filtering to arrive at a consensus about the most significant changes (i.e. the impact of a project). In contrast, the storytelling project aims to collect all stories that are worth telling, and provides organizations with tools to extract out sets of related stories that can reveal root causes or common elements of social problems. It is not reductive, and all of the data can be used for many analyses.

Also – most stories about a community effort do not directly discuss the impact of an organization, because storytellers don't know what the impact is or will be. Likewise, storytellers are not reliable reporters about which organizations contributed to what happened, because they don't always know. We cannot rely on them for attribution. However, they do know what people tried to do and what happened – which is the most useful information when trying to determine whether change appears to be for better or worse, or whether people want more of this happening, or whether a community thinks the right or wrong people are benefiting. Community satisfaction is

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[31] A story analyst is anyone who cares enough about her own community to participate in the process, either in person or online, and not necessary a paid professional.
[32] http://www.mande.co.uk/docs/MSCGuide.pdf

not social impact, but it can be reliably tracked in real time. Hence, our analysis focuses on summarizing what is happening, to whom, where, by whom, and whether the events are good or bad. This focus differs from **appreciative inquiry (AI)**, which focuses on positive change and tries to unique groups behind what is working. We think learning what is not working, or uncovering problems nobody is addressing is just as informative.

Asking people to share a story about the most significant change will likely provide different information from asking for an anecdote about recent community effort. Ideally, I wish we could collect mundane ("less significant") stories that describe the work of organizations and individuals, as these would reveal the more detail about what is happening. That will be possible when many more people are plugged into online social networks.

Our goal is for the story project to generate a **continuous flow** of stories in and lessons out. Relying on a crowd of analysts to generate personalized conclusions may sound preposterously complex, but we are already surrounded by interfaces that do this quite well. Facebook shows you the news from the point of view of your immediate circle of friends. No two Facebook pages look the same, and yet they sit on top of an ever growing network of story fragments (most of which lack any useful information by themselves). This is an example of an interface that enables emergence of what's happening and what matters to people, and serves as a highly effective human relationships manager. Any dynamic project management tool should have similar flexibility.

Goals for our kind of analysis[33]:
1. Make data digestible:
- Generate a library of *people's lived experiences* that facilitate decision making and *evidence-based policy*
- Generate *rolling baselines* to continually update evidence base
- Visualize *shifting patterns of impact* as perceived by different perspectives, including beneficiaries
- Ground feedback to donors in a useful framework that allows *groups of beneficiaries* to be heard
2. Measure the actions taken:
- *Seek surprise:* allow people to recognize trends that do not conform to their own pre-existing worldviews
- Enable *cross-silo and cross-organizational thinking* - moving away from a narrow understanding of attribution of efforts
- Track *actions taken* and the specific lessons that prompted it, via a peer to peer knowledge management system

2.1. Example of how an organization uses stories: TYSA

Trans-Nzoia Youth Sports Association (TYSA) met to discuss the 140 stories collected about their organization posted online. They identified eight specific themes and frequent mentions about three of their four projects (education, sports, and capacity training). However Francis Gichuki says that the discussion was mostly

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[33] Thanks for Irene Guijt for providing this useful framework.

about why a forth project (child rights and protecting children) was not mentioned much, although stories about these issues did come in. "It is interesting because we do a lot on this issue," Francis Gichuki said in an interview. "It is a gap we are seeing. A gap between our service and the community's awareness."

Another story sparked a lengthy debate about how TYSA should address the root causes of crime in the community. It began, "A friend of mine lost six of his friends in one year to crime, police gunned them down….we need to get something constructive to do [other] than getting involved in crime…" and mentioned TYSA specifically as the organization that needed to help. TYSA's staff debated the right course of action: should it provide more sports opportunities to keep at-risk youth busy, or take these and related stories to local leaders, raise awareness, and ask for help? Up to this point TYSA's mission had been to promote youth sports as a means to curb teen pregnancy and other social problems, but there was now a compelling reason to broaden the scope. This prompted them to examine related crime and safety problems.

A "pivot story"[34] like this might transform an organization's understanding of its mission (from youth activities to youth advocacy in the case of TYSA), or confirm a new direction is the right one. Recently TYSA has engaged youth and specifically asked them to talk about what they want to see in the new Kenya constitution. This is one small aspect of a larger project, but may grow as stories come in about the ideas that emerged from these discussions on democracy.

Gichuki also noticed that stories about HIV or early pregnancy mentioned that TYSA had shared information with them but did not mention condoms. This led to an internal debate about whether the community wanted TYSA to provide condoms to youth, or whether the storytellers were even aware that such devices were needed to act out the advice TYSA gave youth. TYSA is planning more specific follow up discourse with beneficiaries as a result of this ambiguity. If given access to an SMS feedback tool, Gichuki said they would probably want to ask, "Which specific activity should we give top priority in your community?" His impression is that this approach is "very fast" and can give them a sense of what services they should improve, or as in the case of HIV, re-examine their messaging. Gichuki also wished that GlobalGiving was more connected to local leaders, because they could benefit from knowing what the community thinks even more.

Recently, TYSA won an award from the MDG Trust for its work on Goal #3 – "Promoting Gender Equity and the empowerment of women." To illustrate how different story data is from typical organization reports, I compared TYSA's stories with the phrases from TYSA's winning application to the MDG Trust. Both sets of information are about the same goal - empowering girls – but communicate the reality in different ways (direct quotes):

TYSA application to MDG Trust	Stories about TYSA related to girls empowerment
This project used sports to empower rural girls especially those affected by the post election violence.	Provides sanitary napkins to girls
	They encourage girl who they drop school

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[34] Concept taken from Cynthia Kurtz http://www.storycoloredglasses.com/2009/10/eight-observations-2nd.html

The mentors (mostly women) perform different roles including home visits when need be to check on progress of players and hold discussions with parents. TYSA started with only one girl in 2002. To date this school has enrolled hundreds of girls through the football program. Atieno Oduor, 'I dropped out of school in form 3 when I got pregnant and then married in 2007. We stayed well at first but in short period things changed totally and life became tough and harder for me to stay in marriage. I was blessed with a boy but to raise food was terrible.'	because of been pregnant. They tell them you have to go back school after got your baby. The girl realy lost hope in life and even decided to get married as a second wife as she was so desperate. There is a boy who befriended a form four school girl. The girl was pregnated and the boy disappeared. The mother of the girl is now taking care of the child after the girl gave birth. When she tries to tell them the dangers of sex before marriage they laugh at her, but she still insists to remain a virgin.

Neither version is more correct than the other; these are just two sides of the same project. But if you are working at TYSA and want to know whether the aspect of the program where mentors visit girls at home is leaving a lasting impression on the girls, you could look through the stories for evidence. This is less clear than the outcome, as many stories talk about the support a girl has received, but none mention visits or mentors explicitly. One story states: "It has help to brought back people who are at home brought them to school." But even this can be interpreted many ways. So on the whole, these stories can be scanned to answer many questions, but are not difinitive.

Also keep in mind that finding stories that mention something you did not ask about are far more valid as evidence that these things are significant than a survey question that explicitly asks about them.

Emergent views: Events from many angles
All stories since 2010 are available online at www.globalgiving.org/stories/ and from 2009 at tinyurl.com/ggkenya. More about the methods are found at www.globalgiving.org/story-tools. You can search stories at www.globalgivingcommunity.com/search2.html. A proposed future version will allow these stories to trigger conversations, as anyone may ping the storyteller in the search results. You ask a question, that is relayed to the storyteller's phone, and replies come back via email. This is a true multiple-perspectives approach, as the storytellers can speak for themselves, answering any question about their own story.

2.2. GlobalGiving's use of the stories

GlobalGiving's mission is to run a marketplace that supports NGOs with fundraising and make them more effective in a variety of ways. Hence, our impact on communities is indirect, and depends on partner organizations. We can improve our tools based on direct feedback from partners, but that doesn't tell us which of our partners are continuously trying to improve their services.

Our current idea is that these stories by themselves do not provide enough detail to evaluate our network of partners, but they do provide valuable information to our partners. Some of these will use this information to improve their projects. Knowing who is curious (seeking knowledge), willing to listen to community feedback, and learning from it will allow us to define who is a potential community innovator. It will also allow us to quantify which organizations are best aligned with community priorities. Since we believe communities are the experts on what they need, **we want our organizations to be increasingly informed by and aligned with community needs.** In short: Curiosity leads to listening and learning, which leads to alignment, which leads to better services and more innovation, which might lead to impact. We can measure curiosity by measing how much our partners use the tools we provide.

	Our old thinking	Our new thinking
Partner Organizations	**Mapping impact:** stories aggregate to reveal organizations' importance to social change. (Requires accurate local knowledge about attribution.)	**Mapping alignment:** Stories reveal who's working, what they're trying, and what nobody is addressing. Alignment has less to do with attribution and is much easier to quantify.
GlobalGiving	Our impact comes from partnering with organizations with **high impact**.	Our impact comes from supporting **curious, listening, learning** organizations with good alignment.

In 2012, every story appeared online and many were algorithmically matched to a project by topical relevance (look for the 'stories' tab on most project pages on GlobalGiving). In addition to defining our network by their traceable behaviors, we can also monitor stories that raise questions about existing partners or praise new NGOs we don't currently partner with. We should try to recruit those organizations. And if people complain about our NGOs, we should listen and act.

We also need to know which organizations might be working with storytellers to **stretch the truth** in their stories. Patterns in stories can also aid us in detecting and correcting bias in stories.

So how do we tell if stories are true? Here are some guidelines:
1. Stories from many different (independent) sources are more trustworthy.
2. Stories from beneficiaries that include special details only project staff should know are untrustworthy.
3. Stories that share a similar narrative structure, and come from around the same time, but from different sources less trustworthy.

4. Stories from a source that has a long track record of submiting other trustworthy stories are also trustworthy.
5. Stories that provide unexpected lessons (perhaps a mixture of positive and negative aspects of an NGO) are more trustworthy.
6. Stories with excessive NGO self-referencing or formulaic praise are inauthentic.
7. Verification – using face to face meetings, SMS feedback – how do other people within the community react to questionable stories?
8. Stories that *djotjog* (below) are reliable.

Note: These criteria are very similar to the authenticity criteria adopted by the Jesus Seminar in 1985: http://en.wikipedia.org/wiki/Jesus_Seminar

2.3 Djotjog Mapping
Pattern convergence reveals the strongest and most-likely authentic signals in the data.

The Javanese word *tjotjog*[35] refers to a state of being where two things affirm and validate each other. Story *tjotjog* is not two people saying the *same* thing; rather, story *tjotjog* is when many people tell slightly different stories that reinforce some common theme among all of them – a theme that is hard to predict beforehand and may not even be conscious in the minds of the individual storytellers. However, if storytellers are presented with this meta-theme afterwards, most if not all of them would agree that the common theme harmonizes with their own experience. At the thematic level, *djotjog* leads to the emergence of new understanding about what is happening in the community. Either story elements or community attitudes about NGOs can *djotjog*. When we map who shares stories about whom, a confluence of stories about the same NGO with similar meaning from many sources is *djotjog* – and thus our basis for trusting this data, and the NGO. For example, this organization (TYSA):
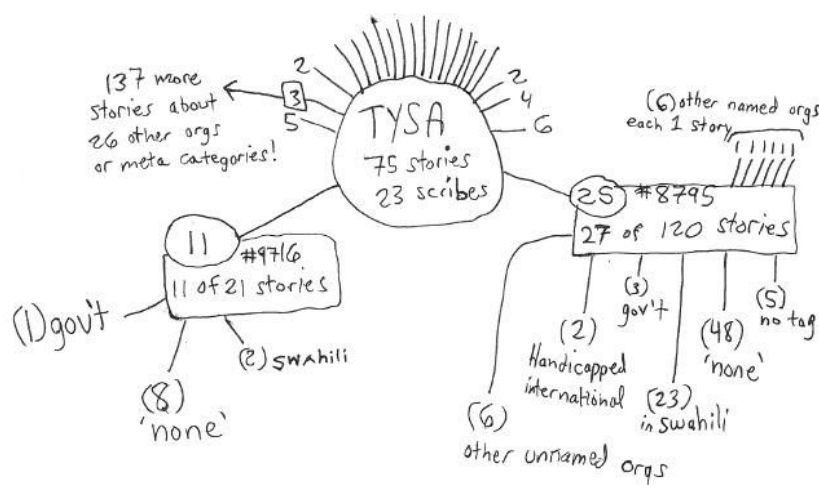
Has 75 stories told about it through 23 scribes. Several of these scribes submitted oodles of stories about others subjects too. We tend to like diversity in who gets mentioned in sets of stories submitted by a scribe. In practice, it may be rather difficult for our NGOs to systematically manipulate stories coming from a large

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[35] The religion of Java By Clifford Geertz. University of Chicago Press (c) 1960, p33.

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number of scribes. I believe this "real book" will be extended in the future to better outline how we detect and correct story manipulation[36], and how story elements themselves *djotjog* into trusted and clustered information. In fact, I'm writing grants to try and develop this aspect of the project – algorithms to aid in visualizing emergent themes in related narrative qualitative sets - right now.

These NGO-scribe-NGO connections can be used to reveal a previously hidden collaborative network in the community:
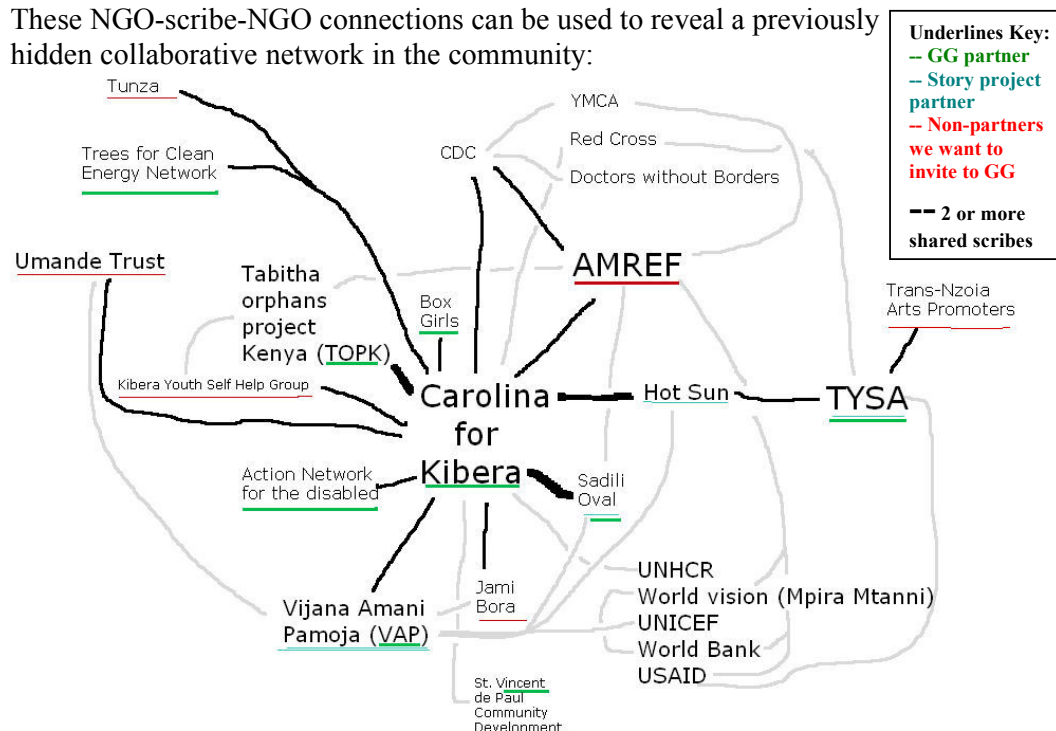
This network map connects organizations by their shared scribes, not their funding. All of these organizations necessarily serve the same community, because scribes collect from a geophraphically limited area[37]

Note that in this map, HotSun sourced us scribes that collected most of the stories. The first conclusion is that **Carolina for Kibera belongs in the center**. This organization chose not to participate in the storytelling project, so their centrality is a strong signal of their significance. Second, some **interesting NGO clusters emerge**: community based organizations in Kibera (center), health organizations (top), and large international NGOs (bottom). Finally, although stories about **GlobalGiving organizations** (underlined in green) comprised only 10%, they *djotjog* in the sense that multiple scribes mention them. In 2011, we refined this Kibera map using Gephi, a free open-source network visualization software:

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[36] Some relevant blog posts about authenticity: http://chewychunks.wordpress.com/2011/07/25/tracking-flow-in-storytelling/ and http://chewychunks.wordpress.com/2011/09/06/the-interesting-story-filter/

[37] This is only *mostly* true – as we see storytellers occasionally choose to tell stories from another region or country.

Note that in 2010 scribes were given a list of GG organizations, but in 2011 all organizations were named by storytellers with any reference list.

Additional examples found here:
http://chewychunks.wordpress.com/2012/03/28/story-diversity-visualized/

Network mapping matters
We believe this is an essential bit of bottom-up knowledge for our global NGO reputation system. **Communities whose leaders work together, prosper.** Mapping community efforts and the groups that sustain them is essential to building a stronger, more self-sufficient community, and can also be a means of reducing our exposure to risky organizations. In 2012 we've started using this data to provide NGOs with recommendations of whom would be good for each one to work with, based on proximity (scribe-overlap) and mission overlap.

2.4 Instavaluations
Computer-generated feedback tailored to each specific partner organization on demand.

Because our goal is to provide organizations with information that will help them take action, we don't necessarily need to provide them with visual maps. Instead, we have experimented with providing them instant, personalized, computer-generated evaluations that aim to provide them with three vital pieces of information:
1. **Core alignment:** What does the organization do that strongly aligns with stories from the community where this organization works?
2. **Missed opportunities:** What issues are people raising that this organization (or any other local organization) *not* doing? These unmet community needs constitute an opportunity to better serve the community for the organization.
3. **Networks:** What local organizations can we recommend they reach out to and work with? These are based on connections to organizations this organization already works with, and a strong overlap in mission goals.

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The information we provide can be computer generated by comparing all stories with a set of answers the organization provides us, either via email, web form, or even via text-messages. This is the card we would print and hand to people at a community meeting, so they could generate their own personalized reports.

Do-it-yourself NGO !report! tool:
Answer these questions, sending one text message each, in this order:
1 – your **organization** name
2 – your **mission** (in one text message!)
3 – define the **problem** you address in the community
4 – describe the **solution** you are implementing
5 – list names of **locations** where you work, separate each name by comma
6 – list your **local implementing partners**, separated by commas
7 – your **email** (where the report will be sent)
8 – send the magic word "**!report!**" and it will email you a report.
Do this now. Send each message to +254705956817.

Questions 5 (locations) and 6 (partners) are especially important for limited the scope of the stories analyzed to only local ones. The first 4 questions are used to match relevant stories within the locations provided. Local partners are used to built a NGO-scribe-NGO network and name the central members in the report.

At a conceptual level, this form of evaluation is powerful because it can be generated instantly, with reasonable specificity and relevance, and is free from evaluator bias. It is intended to trigger an informed discussion about the organization's community footprint, community priorities, and next steps. A logical next step is to narrow the focus to a specific social problem, and construct a **conceptual evaluation**.

2.5 Conceptual Evaluation

Unlike an **impact evaluations** and **service delivery monitoring**, a conceptual evaluation is aimed at understanding the root causes of complex social problems, so that each local organization can design and test a sensible intervention. Some of the social problems that local organizations expressed interest in better understanding in 2011 included: rape, child abuse, problems of HIV in Kenyan fisheries, female genital mutilation, why young people run away to the nearest city, food security in rural Western Kenya, youth and urban crime, and factors that impede children going to school.

Gathering a story set for some of these questions is straightforward, such as pulling all stories that include the word "school" using the search engine (www.globalgivingcommunity.com/search2.html). Others are not trivial (run aways) and require several interations with search phrases. Some require the organization to go out and recruit stories from special populations, because that perspective was absent from larger data set (run away stories).

Look online for many examples of conceptual evaluations:

Kibera story themes:

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http://chewychunks.wordpress.com/2011/01/21/the-story-theme-game/

Rape:
http://chewychunks.wordpress.com/2011/07/25/comparing-two-rape-prevention-programs/

Youth development, sport, child protection, hunger:
http://chewychunks.wordpress.com/2011/11/16/kisumu-community-feedback-focuses-on-conceptual-evaluation/

NGO-specific word-maps using Gephi:
http://chewychunks.wordpress.com/2011/09/20/more-story-theme-maps-about-kenyan-ngos/

http://chewychunks.wordpress.com/2011/09/19/visual-story-mining-words/

Drought and Famine in Horn of Africa:
http://chewychunks.wordpress.com/2011/09/02/storytelling-the-east-african-drought-famine/

Using a blog (westandwiththe99percent.tumblr.com) and no survey questions, you can still do some conceptual analysis:
http://chewychunks.wordpress.com/2011/10/22/1-percent-stories-meta-analyzed/
http://chewychunks.wordpress.com/2011/10/22/1-percent-who-stand-with-the-99-percent-more-meta-analysis/

Example of when an organization tries to coax out stories only about themselves:
http://chewychunks.wordpress.com/2011/08/12/stories-about-water-and-swim/

And future examples can be found here:
http://chewychunks.wordpress.com/storytelling/

Other kinds of evaluations
The four main types of monitoring and evaluations are:

- **Impact evaluation**: How did a specific organization contribute to changing a community, addressing a social problem, or improving a life? This is what most people mean when they say "evaluation" but it is difficult, and perhaps impossible to conclude with certainty. At the very least, it is expensive and takes years, and often inconclusive. This storytelling method will not work any better than any other method, and may work worse – since community members may not know that a particular organization contributed to the work, and thus not attribute the change they see to that organization. Impact evaluations require a clear chain of causality and therefore require attribution.
- **Quality of services monitoring:** Improving service delivery is a priority for governments and large bureaucratic organizations, and a storytelling project *could* work, but it would require more systematic placement of story collection points (outside clinics, beside waiting lines, etc.) to work. Our current survey form is too open ended to do a good job.

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- **Conceptual evaluation:** What we do for our network of NGOs – works well when communities talk about something an organization cares about.
- **Reputation tracking:** It is also feasible to monitor the overall reputations of thousands of organizations.

Part III: Quality Control Methods

Here are some practical approaches for ensuring a high degree of honest stories relevant to the work of NGOs, and minimal metagaming[38]. This also explains the rationale behind the design.

3.1 Detecting and correcting misinformation

I'm assuming most people who work in monitoring and evaluation (M&E) study statistics, sampling, and the effectiveness of interventions to help the poor. None of those really prepare you to deal with all the problems with measurement that sink you before you ask the first question. What does help is **thinking about psychology, game theory, and behavioral economics**. These are all systems of thought that deal with manipulation. As you ask questions, you are manipulating people (hence using psychology). Whether you like that word or not – you must manipulate people with your questions, survey locations, and your presence as a person of a certain authority to get them to tell you the truth. And even if you get the question, context, and questioner right, people in many situations are still better off lying because the rules are such that lying benefits them more than the truth (see behavioral economics). **The meta game is about using a system to detect and correct misinformation.**

Once you know what's happening, you can then design a survey that changes the rules and rewards people who are honest (game theory). So here is a brief outline of how we dealt with these problems, and what to think about yourself:

The "questionnaire questionnaire":

Questions: Did questions tip off what we wanted to hear?	Our questions were designed to be neutral, so that a person could not tell which answer is the "right one" to pick.
Questioner: Did we use trusted liaisons to ask the questions, so that we get back honest answers?	We gained a huge advantage from choosing to train and hire young people within the community itself to ask the questions. They were free to ask anyone in any place.
Context: Did the location where the questionnaire was completed influence what was said?	The environment sets the context. Instead of taking people to an NGO office, scribes worked in the community. Some

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[38] Wikipedia: Metagaming is any strategy, action, or method used in a game which transcends a prescribed ruleset, uses external factors to affect the game, or goes beyond the supposed limits or environment set by the game. Cheating in evaluations can be thought of as a game, and therefore prevented through metagaming.

	scribes took papers home with them and asked others in a "safe" setting. However, we also aware that we over-represented young, male street guys, because scribes worked in the streets, where mothers and the elderly were underrepresented.
Subject: Was the target (NGO) of the questions able to manipulate results?	No. Although NGOs knew about the survey, and many were named by storytellers, NGOs could not access and change the stories, so we feel that collecting papers directly from community helped.
Incentives to lie: **Reciprocity**	If a person has a relationship with a local NGO, that NGO could reward them for saying what outsiders are looking to hear. We know that most of our story collectors have relationships with NGOs, and all of our storytellers have some relationship to story collectors.
Incentives to tell the truth: Financial	Collectors who completed a large number of stories received a $1.50 reward per 10 stories completed. This incentive is clear to scribes. NGOs trying to self-promote what I call "glorious narratives"[39] tend to produce highly redundant stories.
Incentives either to tell the truth or to lie: **Reciprocity**	Reciprocity can be either bad or good: Bad reciprocity is when two NGOs post "glorious narratives" about the other, and neither story is accurate. Good reciprocity is when the person telling the story gets to read what others said in their stories afterward. As both a contributor and user of information, they will provide true stories because they want accurate information in return. This is called "network reciprocity." We want NGOs and storytellers to use these stories, and thus promote good reciprocity.
Incentives to tell the truth: **Information and Reputation**	We later sent text messages to scribes and storytellers thanking them for participation and showing them the title of their story – proving we heard them. We are experimenting with a 2-way conversation version, so that information becomes the reward, and thus organizations will be able to boost their local reputation.

[39]**Glorious narratives**: The sort of exaggerated success stories some NGOs coach their beneficiaries to tell when the funders pay a visit. Even without manipulation, people psychologically prefer to accent the positive, unless there is an incentive to do otherwise.

Privacy policy: Anonymous versus protected feedback.	Generally speaking, anonymous feedback is more common than the identity-protected feedback system we use. Our privacy policy is that we store the phone numbers of the storytellers and scribes and don't release them with the stories. However, we will allow NGOs to ask specific users follow-up questions via our SMS gateway without revealing phone numbers, unless they opt out.

3.2 Sampling methods: random or diversity?

The standard survey approach is to send out highly trained surveyors who collect a random sample of the population. In practice, these surveyors gather data by knocking on doors of homes, in public places, over the phone, or over the Internet.

Originally, we tried training young people to go out and collect a "random sample" of community members, but we ended up with only people who were out on the street in the day time, and only people who didn't look scary to approach. Any walking survey team is going to collect a biased, non-random sample, and collecting by phone or over the Internet was not an option. In Africa there is no phone book from which we can pull every 17th name, nor do most houses have street numbers on them. We needed to think about the problem from a different perspective.

The one major downside to random sampling is that we don't have any rigorous test for knowing whether the sample was collected in a biased way. We can examine demographic information and try to balance for age, sex, level of education, family status, etc. but we don't know whether the population was balanced to begin with. Our method is something of a hybrid between what statisticians call "stratified sampling" and "cluster sampling." The strata are defined by seeking out stories from populations that would interest our partner organizations, and the clusters are tight social networks of scribes and people they contact within communities. Other more rigorous statistical approaches tend to be more expensive and provide *inferences* about the general population, but there is no guarantee these findings will be replicated over time across many places. Also, these random samples become less random with repeated, continuous monitoring[40], which is the goal of our design. Our goal is to gather the most diverse sample possible and track the most important kind of bias in our work directly: **relationships**.

We deliberately encourage NGOs to connect us to their beneficiaries and community friends. After they participate, we invite these people to go out into the community and ask their friends for stories, and so on, until you have a growing network of engaged citizens. We track who is connected to whom, and this allows us to see which parts of our sample contain the most biased information[41].

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[40] This can be debated. One example of this are Nielsen families, who are chosen randomly to represent the population's TV viewing preferences and then monitored continuously. Do they truly represent the country at large? Or do they start to watch TV with the idea in mind that they ought to represent the population?

[41] If an organization provides us with a group of scribes who collect a lot of stories about that same organization, we call these self-reports. If all these stories are too similar (as determined by a computer algorithm), they are labeled as duplicates and removed.

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This is about as biased a sample as you can get, if you are trying to estimate some average value for the community as a whole – such as median income or incidence of HIV. However, we aren't trying to estimate averages; we want to know which NGOs are doing good work, and what is happening on a hyperlocal level. Instead of calculating an absolute HIV prevalence we calculate the prevalence of HIV stories compared to other themes, such as stories of crimes against women or unemployment. We can also map clusters of HIV stories and compare their locations with HIV treatment facilities, as this interactive map[42] reveals:
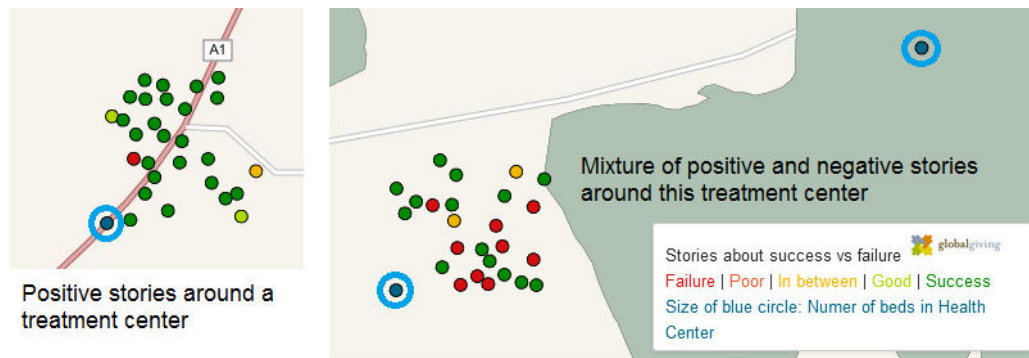
The local information supports local decisions, such as finding out which testing centers are surrounded by negative HIV stories, and are therefore not helping. Or perhaps the story trend is that we see more negative stories the farther we get from an HIV treatment center:
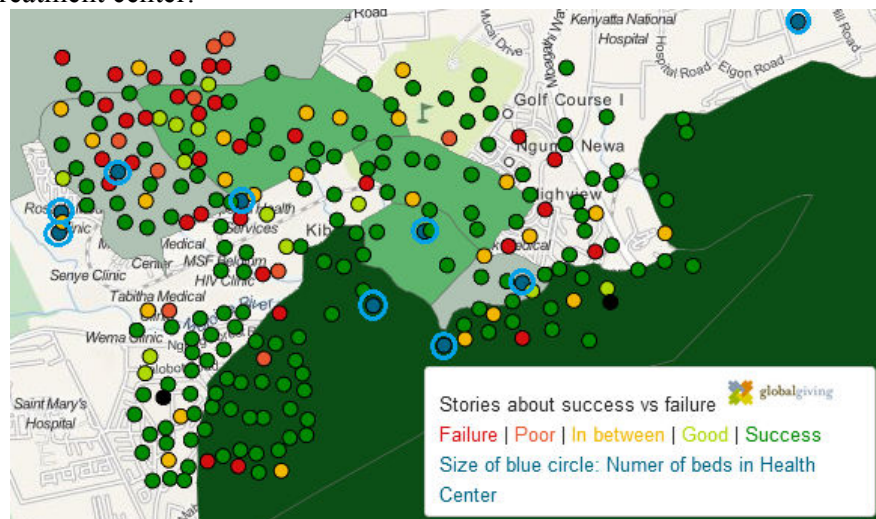
With a huge number of stories, the individual biases of scribes and the NGOs who sourced them to us cancel out. And perhaps with thousands of community samples, representing tens of thousands of people, we can make statistical *inferences* about the population in the future. In the meanwhile, lots of local actors can make local decisions informed by local perspectives more quickly, and with reasonable accuracy. The true measure of accuracy will come in the future, when we see which trends are consistent in many places over time.

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[42] http://tiles.mapbox.com/stories/map/map-yjb5jlwq

This approach also reveals good NGOs because any NGO ought to connect us to good people and other good NGOs, creating a large (yet mostly invisible) network of community development activists. If true, then starting with any group of NGOs "inside" the network should eventually lead us to the most connected and appreciated NGOs in that community[43]. Those we miss, because they leave no trace in the community, are probably a mixture of those with low social impact and those who make a big difference in the lives of a small group of people. Either way, GlobalGiving won't be much use to them nor they much use to the rest of the community. However In contrast, identifying these invisible networks of change agents in a community and connecting them together might lead to even greater social change.

Another advantage is in dealing with cultures where certain enthnic groups are suppressed or where women are culturally conditioned never to talk about important issues. Random sampling's weakness is that people will not open up to a stranger. Instead, we want people to feel comfortable, and for that friends need to interview friends. Elderly women in Ethiopia won't to open up to you, but the might talk openly to the right trusted intermediary. And wouldn't you like to do something about those sub-populations missing from your sample? Diversity sampling is the iterative process of deliberately adding perspectives from many sub-groups into the overall worldview. Because this method is non-random, you can grow a large diverse focus group over time.

For the past year we've been trying to recruit more female scribes, because – as one person put it – men talk to men and women talk to everybody. Our existing data still has a consistent male-female ratio of 60-40 despite our efforts, but now we know that achieving 50-50 would require using mostly women. Conversations with partner organizations interested in using these stories revealed other underrepresented populations, such as runaway children, fishermen and market women around Lake Victoria, and refugees in Dadaab camp. We recruit new groups of scribes to fill in these gaps wherever we have people willing to use the information. But because our diverse samples *are not random*, we should avoid making *statistical inferences* about the whole population from this data, until the sample is extremely large (like hundreds of thousands of stories).

Instead of unconvering "timeless, universal" patterns and inferring they represent the total population, we look for local patterns that can foster **locally relevant conversations.** What knowledge can a *local* decision maker can use? As our sample grows to be hundreds of thousands of stories over a wide region, spanning several years, local patterns that repeat in time and space are likely to represent the population at large. And even if we don't, we now have a measure of which sub-regions they do represent, and perhaps which times of year they apply. The power to spot complex trends is much greater, and each organization's required effort to support this mornitoring is minimal.

Providing each organiztaion with a few self-serve story analysis tools would also make a big difference in how often stories improve decision-making. These are some required tools left to build to and refine:

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[43] Example of this centrality tendency, watch
http://www.ted.com/talks/lang/en/nicholas_christakis_how_social_networks_predict_epidemics.html

- Ability to **search all stories** and pull specific subsets matching some theme.
- Ability to **recognize trends** and limits in the data (*djotjog mapping*).
- Ability to **benchmark these patterns** against external references (compare their work to similar projects), over time, and within the same set of storytellers. We ask every storyteller for 2 stories so that we can compare each group of stories to the spread of topics covered by these storytellers' second stories.
- Tools to improve the data through **conversations** (*agile feedback loops*), such as "ask the storyteller via SMS", bulk messaging to a community about upcoming events, or instant polling about past events.
- Ability to **visualize the community's needs** and see which ones are being addressed by civil society and which ones remain unnoticed.

What follow-up actions to we hope to see?

- One local organization with limited resources can't create a program to treat the whole population, but it can address smaller pockets of problems that appear to be the most pressing needs of the loudest people.
- A local NGO can use direct feedback loops to expand the sample. If they decide to do something based on this data, they can announce it by SMS to all the people across all stories and request feedback. If the population generally disapproves of it, someone within the group will complain to the NGO. Or if a community member has a way to improve the project design or focus, they can be heard.

Because the data comes to NGOs in iterations, not as a one-time glob of opinions, the attitudes of both the staff and community can evolve. As conversations become more frequent, the need to large-scale external evaluations decreases.

And here lies the second major difference between what we do and what pollsters do. A scientific poll seeks to achieve precise population-wide estimates that reveal tiny changes in attitudes over brief periods of time. We want something different and less audacious – which is to discover what one group of people cares about and share it with another group of people that have the power to change the community. Our non-random sample is a pretty good sample of the sorts of people we want to talk to – namely those who want to work with NGOs and help their community. We depend on them to speak for the larger, silent community until those community members choose to speak for themselves. The overall picture of community needs might be interesting to journalists and outsiders, but it is the micro-feedback-loop that matters more, because it triggers specific action. On a large scale, this process should resemble direct democracy for civil society.

If, instead, you are still convinced that we can do more by extrapolating from brief and tiny samples of life captured in one-time surveys to broad and timeless descriptions of social change and impact, I urge you to measure how often results from one survey extrapolate to a different time and place, because the reproducibility is not great. I want quantitative data about people and social change, and I believe our ability to extrapolate from survey results is limited, so we're trying to go further and transform our evaluation tools into a regular part of daily life – like Facebook or Google – so that we're constantly looking at tens of thousands of bits of knowledge instead of just a few hundred. See section 3.3 for details.

3.3 Encouraging cross-narratives

For comparison, here are two other organization story networks. The first one (Carolina for Kibera) reveals a phenomenon that we would really like to promote systematically: cross-narratives. **Cross narratives** are stories from scribes who were sourced and trained through one NGO that describe other NGOs. At the heart of *tjotjog mapping* is a philosophy that each person can only boost another's reputation, and that the best reputation is built of spontaineous praise "building blocks."

Carolina for Kibera (C4K) is a long-time GlobalGiving partner (the 15th organization to join, actually). They only work in one slum in Nairobi: Kibera. It has a local headquarters but receives a lot of support and direction from managers at the University of North Carolina. It runs a lot of projects but doesn't tend to collaborate with local NGOs much. We gathered that impression from meeting with NGOs throughout Kibera, including some that share the same property with C4K but whom have never been invited in to C4K's offices for a meeting.

We met them and asked for their help in recruiting story collectors (scribes). They chose not to help directly, and did not send scribes to any of our other trainings as far as we know. So none of the 15 scribes in this map are directly connected to C4K, but the fuller map explains where these stories are coming from:
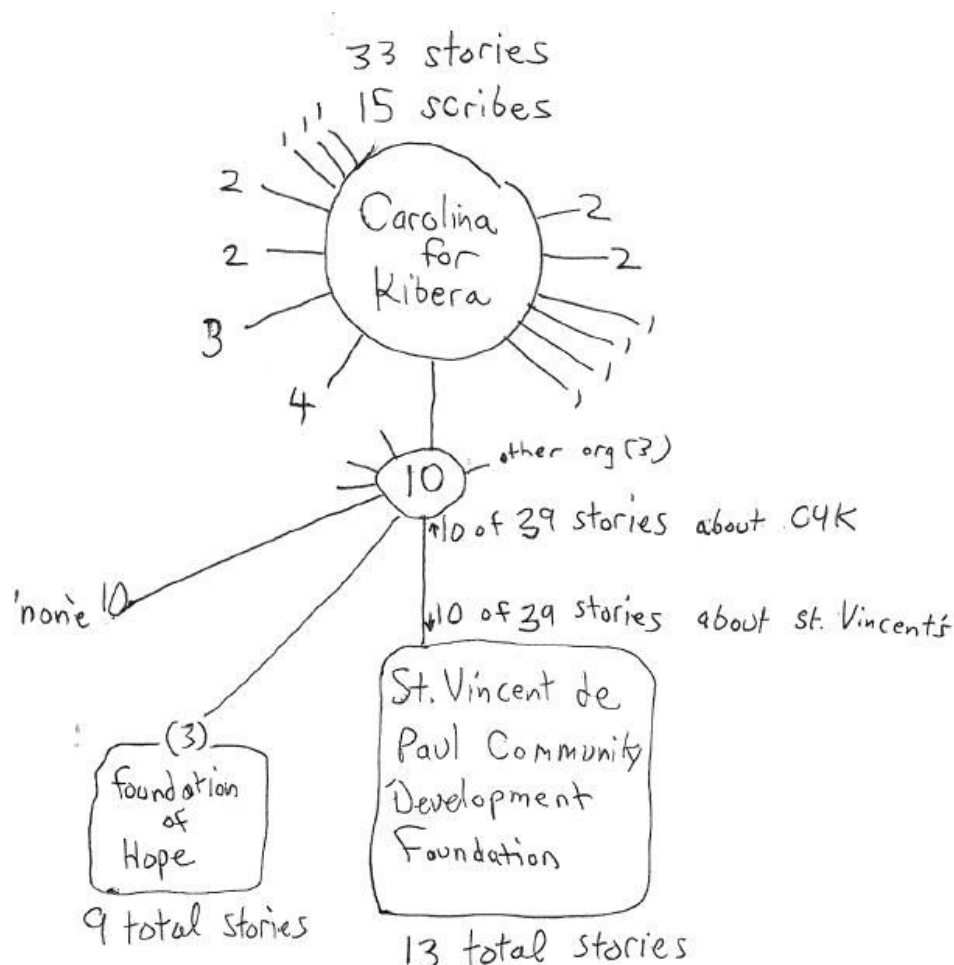
From the fuller *tjotjog map*, it is apparent that a third of the stories are from someone who was trained through an event hosted by St. Vincent de Paul Community Development Foundation. This person also scribed several stories from Foundation of Hope, which is a newer GG partner we know less about, but that looks promising as a connector – meaning that we will ask for their help in locating more scribes next year. Through **cross-narratives (**scribes sourced from one NGO collecting a lot about other NGOs), we are able to trangulate and trust three NGOs with greater confidence than if we have carried out this story collection in silos – with strict instructions to only tell stories about the one NGO we wanted to know about. We would have gotten stories from a different kind of person – intricately connected to the organization as a "model beneficiary" in any case. This method allows us to sample the edges of an NGO's beneficiary community, as well as the "model beneficiaries."

3.4 Dampening problematic story flows

The third case is one we want to avoid. GEMINI is a long-time GG partner, hosted a training for story collectors, and ultimately did not source any cross narratives:

```
               1
               |
            /GEMINI\
      3___ | 33 stories | ___ 1
            \ 4 scribes /
               |
             #6080
           28 stories
        (all about same org)
```
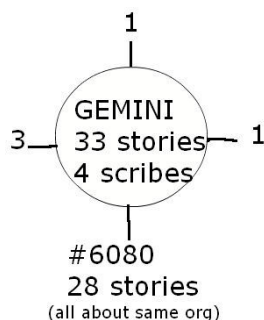
Nearly all the stories can be traced back to the same source, who did not collect stories about any other NGO. Since the person wrote her name beside the phone number in the data (although we did not want names), I decided to "verify" the source. I looked her up on Facebook, and she was there. I wrote her a message: "Do you work for GEMINI?"
Reply: "No I don't."

I'm not sure whether this true. But without connections to any other organization, the data comes to a dead end and the stories stand on their own merits. On that front, some of these stories are signified by the storytellers as the most positive accounts, exemplifying a unified community. On a deeper level, I found that the stories that were collected in my presence mention GlobalGiving by name, and not necessary GEMINI. This is usually evidence that the beneficiaries were told they would be talking to GlobalGiving, and may have been coached on what to talk about. Normal beneficiaries don't know who GlobalGiving is, and we're fine with that.

3.5 Locally verifying and working with story trends
One project management strategy is to use the stories to trigger stakeholder discussions that continue to focus on community trends.

Once we have story trends and know the network connections that explain how stories got to us, we can verify these trends in a much more direct way than relying on models or statistical inferences. We can ask people in the next meeting if it seems to reflect their perspectives or not. These follow-up meetings are essential for closing the loop on whether the knowledge in the stories is *tjotjog* with the perspectives in the community.

We use can also use this map to pick the location and invite key attendees, along with a larger invite to the general community. A statistically valid method would be to invite a few of the most and least reliable NGOs to attend, and then highlight the results of both groups while asking the same question: do the conclusions from these stories about this or that NGO match your own experiences? You can scribe additional stories right now to answer. One of several things could happen:

- **Confirmation:** People could all affirm that this is true, and submit a bunch more stories at that time that are not coming from the NGO or the story collector.
- **Discourse:** Insiders and outsiders in the crowd could start debating whether this is the community view, or just a view from a select few. Ruckus debate ensues, and you videotape the whole thing for youtube as "democracy in action." Each side gets heard, and the final product shows a mixture of viewpoints on the NGO or community need.
- **Evasion:** An NGO that truly misrepresented itself will try to avoid a community meeting at all costs, especially when the attendees are outside of its control. Record their excuses and refuse to publish the stories until confirmation can be reached. The excuse you can use is that this NGO seems to be statistically isolated from others in the network – which is true as part of how you identify them – and therefore needs to be connected through this meeting and the other issues / NGOs that may come up.

There is nothing more powerful for fixing a community than a moment when a cheater is "outed." *Tjotjog mapping* is a means to detect cheaters and correct the problem by arranging interventions. This approach is speculative at the moment, but a nearly identical approach has been used to identify and expel hundreds of teachers who cheated on their classroom's standardized exams in Chicago.[44]

One way to extend the power of these community meetings is to organize local organizations around the largest unmet local needs. We did this in Kibera, Kakamega, and Mathare, where we had over 1000 stories in each place. After identifying one major theme in stories, we asked NGOs present to either "own", "disown", or "ignore" the problem:

- **Owning a problem** means to commit to addressing it before the next community meeting, typically 3-6 months later.

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[44] *Freakonomics* by Steven Levitt and Stephen Dubner, Chapter 1, p15. Harper Perennial (c) 2005.

- **Disowning** the problem means to commit to advocacy with the group that ought to be addressing it, and to report back to the group on whether that other group is addressing it.
- **Ignoring** the problem is to publicly deny that this issue is important and to accept that nothing will be done about it.

Tracking who does what with each problem may provide a much deeper perspective on the nature of each organization, and if we could track this effectively with technology, we could build an entire NGO reputation system around it.

3.6 Balancing incentives to participate

There is a direct relationship between how many stories we can expect to receive and the incentives people have to go out and collect them. Most people need a good reason to participate, so we give them one. The following diagram represents the various influences we think are useful in predicting how many stories one can expect, and how much of it will be junk:

Variables affecting community-based story collection
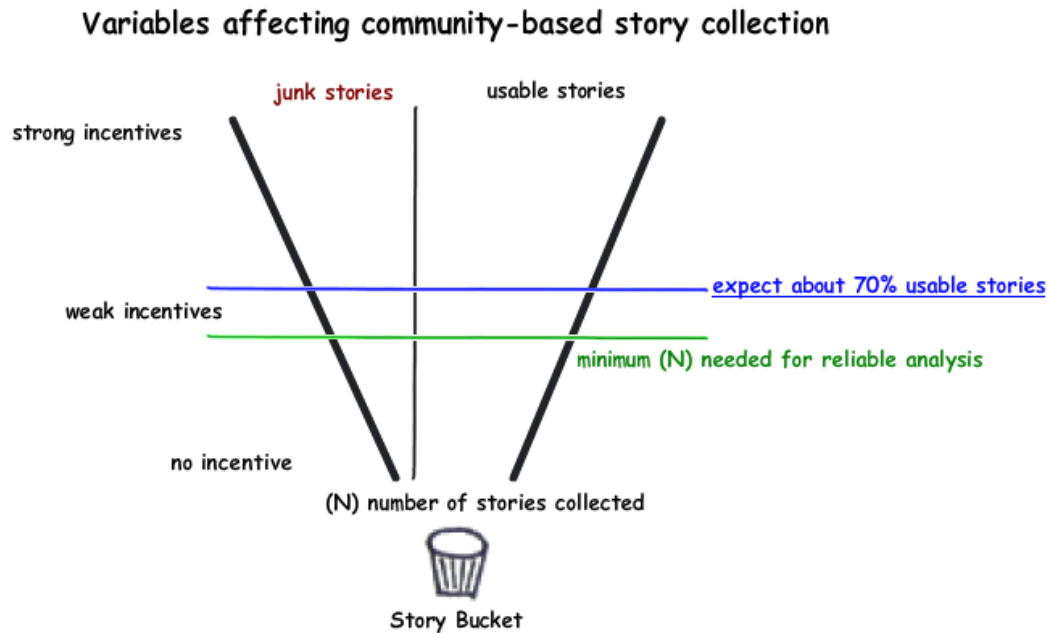
I think the case where there is no incentive at all to collect stories is a special one not well-represented in this diagram. In the absence of personal rewards for scribing stories, many come from people who have other incentives. The easiest motive to understand is the desire of a small NGO to appear like they are making a huge difference, and hence deserve to be given new grants. Sometimes an individual has his own agenda and wants to define the debate by shouting. This is harder to achieve However, by offering some small incentives to neutral story collectors, we see that the self-promoting stories are drowned out by other voices.

Without any incentives to collect stories,

In our pilot, I only have doubts about the stories from 1 of the 242 organizations mentioned. About 150 of these are mentioned only once, so I won't consider them until more stories are collected. But for the two dozen organizations that were mentioned in large a enough sample of stories that there could have been a deliberate push to submit "glorious narratives" about their work, only one of these organizations submitted stories with a surprisingly consistent narrative structure to them[45], and all through the same person. The scribes for this organization had nothing to share about any other organization. I would be very interested to ask these storyetellers for stories about any other organization in the future, so to compare how the narratives proceed. But getting reasonable information about 19 out of 20 possible orgs is a passing grade to me. As we scale up, we will rely on a crowd of story analysis to highlight suspiciously glorious narratives about the same NGO told in the same way.

We think that as we increase the incentives, something else might happen to the data. Instead of getting stories that look like a public relations expert wrote them, we would get more junk. When word of our incentives had reached the widest audience in Kibera, Kenya, we noticed some people were sending in stories given the minimum effort possible in order to gain an immediate financial reward. This was easy to curb, simply by rejecting junk stories on the spot[46]. We expected to need to toss out 30% of stories at our incentive level. In reality, we tossed out only 9% of what was transcribed. I'm not sure how many stories were not transcribed to begin with because they were so incomplete or irrelevant. Next round we plan to decrease the incentives further to perhaps $10 per 60 stories (instead of 20). We can adjust incentives until the fraction of junk and manipulated stories we receive are minimal.

As noted in the meta game table – our eventual goal is to replace financial incentives with reciprocity and reputation incentives. These cost us nothing but can be just as potent motivations. They require that people gain as much from the knowledge as they do from the money before it will work, so there is a long transition phase we must overcome first. Providing direct control of at least some funding to local organizations (via GlobalGiving gift cards sent to mobile phones) also transfers the focus from personal rewards to the community.

3.7 Turning learning into a social lessons network: Ideas for the future

Like the tools we have grown accustomed to on the Internet, the future of this collaborative analysis method for story projects is in a system that makes a few tasks easy and fun:

1. Detecting Patterns in stories
2. Summarizing information from stories into a tweet-length nugget
3. Proposing lessons to one's peers for discussion
4. Receiving feedback on the lesson
5. Receiving public recognition for one's personal contribution to the group

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[45] In addition to closely resembling the organization's own narratives in reports, each of these stories mentioned GlobalGiving by name although there was no reason why beneficiaries would know of us.
[46] Three examples of rejections: A wheel barrow is a useful tool... One day I saw two giants fighting in the forest... I love my mother and she is good to me.

All of these will happen at a typical meeting where a batch of stories is discussed by the staff of an NGO trying to achieve something for the community. **In person**, it is as simple as presenting a dozen people with 100 stories to read and sort, and then inviting each person to share one story from the set that seems to hold special meaning or significance[47]. Step 2 in the above process could be a summary of stories with repeated elements, or it could be focusing on a **pivot story**[48] – one that contains a certain combination of elements that take the reader's thinking in a new direction.

Detecting 'pivot stories' (Cynthia Kurtz's term) or 'myth stories[49]' (Dave Snowden's term) happens almost automatically with face-to-face group interactions (according to Cynthia Kurtz), but rarely happens when stories are formalized as data and anonymized. Dave Snowden argues that a unique strength of his approach to story analysis is that one first examines story clusters and trends that may lead to lessons, and only afterwards does one examine the individual stories to explain the overall patterns[50]. This prevents the first few stories one reads from shaping one's overall perspective on the set of stories.

I can see the value of both approaches. The drawback to pivot-stories is that the story may be emotionally powerful and yet not reflect the overall sentiments of the community. Conversely, the approach of viewing trends/clusters first ignores the way that humans tend to work, and can miss some non-representative stories which have greater power to transform society and thinking. Martin Luther King Jr's "I have a dream" speech might have been a brief anecdote when viewed among the thousands of sentiments in the US Civil Rights movement of the 1960s, but it was significant on a human scale because it became a pivot story that inspired many other stories that would not have otherwise be told. Likewise, many stories about discrimination in the South could have been told, but a relatively small number of egregious lynching tales were the ones that moved the masses to action.

We want people to be moved, but also to be moved by a rigorous analysis of stories that represent a large, important trend or problem. So in this sense, I believe pivot-stories *are* a valid starting point in an iterative storytelling framework, where the follow-up stories add more context to the pivot. An interface that toggles between both the micro and meta modes of thinking will be very effective for online forms of social learning. This toggling approach might be related to what humans do naturally but unsuccessfully to process complex problems, according to economist Daniel Kahneman[51]. We will focus on this in the next phase of our research and explore the different kinds of settings where the stories will start to have an impact on decision-making.

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[47] Rick Davies pioneered something similar, called the "most signification change" method. We also tested this with community groups but found that it needed a real-time data tracking system to be more useful: http://chewychunks.wordpress.com/2011/01/21/the-story-theme-game/

[48] See Cynthia Kurtz's blog for more on pivot stories: http://www.storycoloredglasses.com/2009/10/eight-observations-2nd.html - I think a computer algorithm that can predict pivot stories in a set is both possible and useful, but none exists yet.

[49] The difference is that 'myth stories' represent a local viewpoint that many people share and whom all deem significant but is not necessarily true. 'Pivot stories' are stories that hold significance for many listeners, regardless of their veracity.

[50] There are drawbacks to these face-to-face interactions which are well-known among anthropologists/sociologists and which we avoid by using the entry point of anonymous individual stories. These drawbacks include **group think** (clustering of opinions), self-censorship, and domination by 'leaders' in the selection of what is and isn't relevant. We'll need to look into this in detail in the next phase.

[51] http://www.amazon.com/Thinking-Fast-and-Slow-ebook/dp/B00555X8OA

Filtering

Traditional evaluation relies mostly on a human visiting and writing a report once or twice a year to a small audience of professionals, who then allocate future funding or relay the conclusions of that evaluation to the local implementers so they can improve. In this information train there are at least three stages where humans can unconsciously filter the message: from beneficiary to evaluator, evaluator to funder, and funder back to implementer. Too often the information fails to reach the caboose (the implementer on the ground) and never informs the local community or peer organizations. In 2010 I asked for a show of hands at three workshops in Kenya on whether anyone had received an evaluation from an outside organization. About a quarter had, but the only organization who appeared to relay the full reports back to implementers was GlobalGiving. A success rate of one out of a hundred funders is too small to have a systemic impact on how the work is done at a local level.

If you want proof that self-reported information is filtered, here it is:

Opinions

Community attitudes about the effort in your story are...
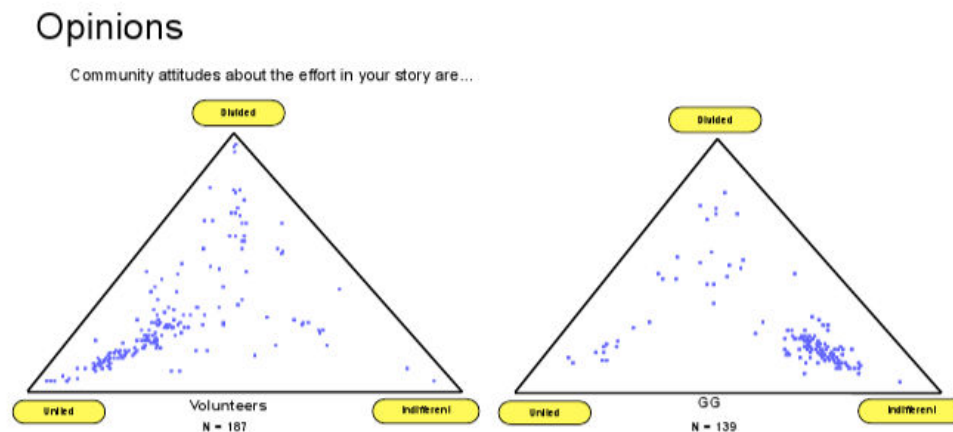
In the above example, we asked a group of fans of GlobalGiving on Facebook (volunteers) to each read a dozen or so reports about the work of some Kenyan NGOs. These volunteers turned in 187 surveys on these reports. We then compared this one question about how people perceived community attitudes to a group of 139[52] stories told about these same NGOs by community members who know about them. The broad trend was that **indifference** was common in most stories, and the GG stories were no different. However, when volunteers read organization reports they came away with a rosy picture of the work, with community attitudes united in support of the project. These projects were professionally evaluated in 2009 and were generally successful, non-controversial efforts. Self-filtering is probably stronger when something is at stake, such as a grant.

In 2011 we found that Ugandan storytellers are simply reluctant to describe the idea attributed to an NGO in their story as a bad one:

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[52] This group only contained 5 of the 33 GEMINI stories, which were atypical of the rest of the set in that GEMINI stories because we think they were entered by the NGO staff directly and show no "indifference" in their answers to this question.
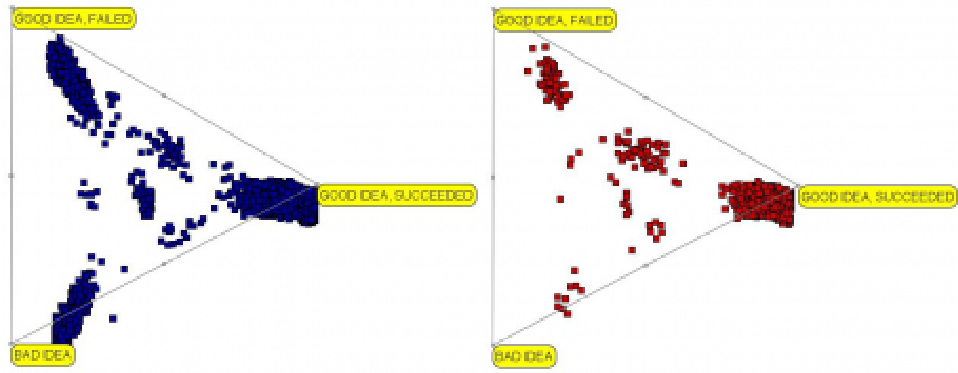
Kenyans, on the other hand, have no qualms describing bad ideas. The topics covered in each country were similar, and about 5000 stories are represented in this comparison (This data was visualized using SenseMaker®).

Part IV: Extending the concept

This section contains less important information, or methods to extend the capabilities of this survey and tailor it to specific programmatic objectives.

4.1 Methods for a self-organizing survey
The innovative idea is to relinquish control of the survey to the population of people responding, rather in the hands of information architects.

The essential problem with survey design is that one group chooses questions to be given to another group, with minimal feedback looping. When the feedback is insufficient, one group is assigning meaning to the subject (by choosing the questions) and limiting what is asked. This idea explores ways to systematically find the "right" question by letting the survey respondents choose the shape of the survey. The storyteller often knows the most important question to ask of his or her story.

In a totally open version, the storyteller could define the story signification:
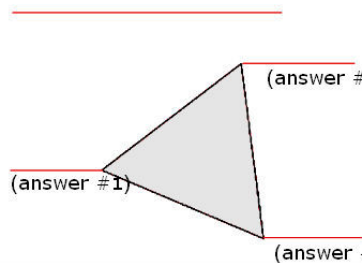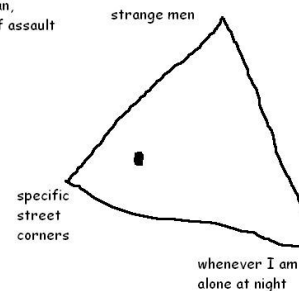
In this hypothetical example, the storyteller wrote her own triad question, defined the three axes, and provided her answer by placing a dot in the space. Adding a blank triad is useful to explore the most creative or insightful questions we could add to a future survey, but is likely to spread the results too thin. What we need is a means to **let the storyteller define the right question** while also constraining the possible questions enough that we will derive useful clusters of stories with similar question frames.

I call this process of letting story elements emerge from a larger set of possibilities "**story marbles**":

41

Imagine, for example, that we want the storyteller to choose the top three most important story elements from among 10 categories (similar to the "Your story relates to..." question we used). Instead of using checkboxes:

□ social relations   □ safety   □ water   □ food   □ shelter
□ skills & training   □ education □ freedom   □ sports & creativity □ health

We could have them perform an exercise with a bag of figurines, colored marbles or clay stones that represent these concepts (with labels, symbols, etc.). The story scribe would draw a circle in the dirt and place a doll or object in the center to represent the storyteller in his story. She could instruct him by saying, "Here are 10 marbles. Each one represents something that might be part of your story. Choose three of them and place them on the ground around yourself. Put the marbles that are the most important part of your story closest to yourself. Put the marbles that matter the least on the edge of the circle."

A typical response to the "Your story relates to..." question might look like this:
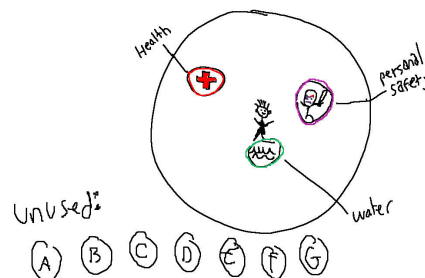
By choosing three "significant" stones and placing them either close to or far from himself in the center of this circle, the storyteller is defining both **what matters** and **how much** each element matters. By not choosing the other 7 marbles, the storyteller implies that these are automatically less important. Mathematically, this is a one question survey that encapsulates 3240[53] possible answers, assuming that stone placements are limited to just three levels of detail (center, edge, or somewhere in the middle). The idea is to associate a **quantitative map of what matters** in the story (from the storyteller's point of view), without overwhelming the storyteller with a tedious process. This may be a less scary and more intuitive approach than paper surveys, and anyone, including a community mover and shaker who happens to not read, can play the game. The tools for completing signification don't even have to look like a paper or computer survey at all, but I think a mix of paper and marbles will work best. This arrangement can be drawn, scanned, and coded just like a triangle, or one can snap an image and send it by phone, where a computer can analyze the arrangement and save the coordinates.

There is an additional, unused axis here. For the sake of simplicity I've left off an aspect of the question that one could simultaneously map this way. Imagine that after the question about "what" is complete, the story scribe pulls more toys out of the bag. She could have some houses (town), a family of dolls (family), a shield with local

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[53] Combinatorial logic: 3 of 10 stones placed in a space at one of three levels of importance. Using 12 stones increases it to 5940 possible combinations.

markings (tribe), and a big house (government). Assuming the symbols are tailored to intuitively mean the same thing to all people in one community, she could instruct the storyteller to now place three of those objects anywhere on the edge of the circle near or far from the marbles. Things that are close together are things that relate closely to each other in the story. After this arrangement is done, she would ask the storyteller to remove everything and paint a picture of the community with just the toys, placing them near or far from the center of the circle to represent how he sees his community – what aspects of "community" are paramount.

This might take a while, but it is far more interesting and game-like[54] to the people involved. What began as a survey has turned into a potentially fun activity. And yet you are mathematically eliminating thousands of unimportant questions in the process of aligning each story along a handful of essential story axes, capturing the essence a la "*sumi-e.*" Mathematically, each questionnaire format is equivalent:
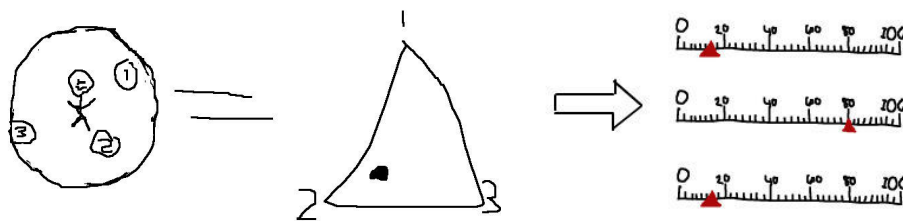
Three marbles reduce to a triad, which reduces to three scale axes, which gets stored as numbers (0 to 100) for analysis[55]. Though mathematically similar, the way the data is collected and the prompting situations where these questions are asked *does* affect the results – so it is worth testing two or more methods. **The goal is to find the right question, and frame answers it in a way that allows many answers to be compared and analyzed.** And obviously, good designs capture mostly what the storyteller meant to say, and less what the surveyor wants to hear.

I believe the ideal self-organizing survey would contain mostly user-defined questions and would rely on algorithms to structure to the data as themes emerge.

4.2 Survey design: Presentation Matters

Here is an example of how subtle differences in the style of asking the same question will yield somewhat different patterns when groups of responses are aggregated:

The same question (how often are the events in your story?) can have several different style formats:

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[54] When does an exercise become a game? Well Four Square is an application that some people use obsessively like a game and all you do to score points is "check in" at your usual locations more than other people. There are no tangible rewards, and the effect is to voluntarily provide the world with a real-time surveillance report on yourself (something that in a different no-game environment would spark fear and anger in the same people who play this game).
[55] Going from left to right, representations are reducible but not equal. There are several combinations of three scales that look the same on a triad; marking 100, 100, and 100 on three scales puts a dot in the center, just as does 50, 50, and 50. Likewise, moving marbles within a circle provides greater grouping possibilities than placing one point inside a triangle. The best choice of survey tool is the one that is flexible but not so complex it is confusing.

rarely ├─────────────────────────┤ often
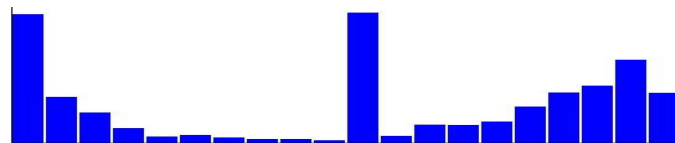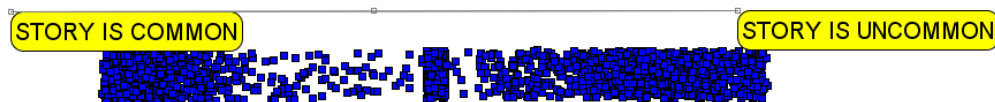
Rare   Often

The first two have been used in paper surveys. The third version is the standard SenseMaker® online web format.

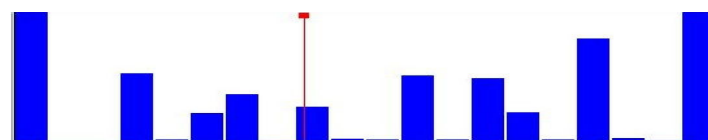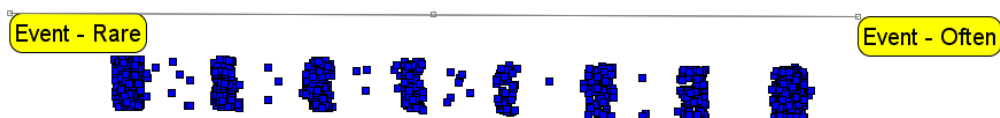Here is the kind of story distribution each version generates:

rarely ├─────────────────────────┤ often

STORY IS COMMON   STORY IS UNCOMMON

Rare   Often

Event - Rare   Event - Often

If presented with a line and asked to placed a dot, storytellers segregate into two groups (the spike in the middle is likely an artifact caused by not answering this question). But if presented with 8 boxes and asked to put an X in one box, storytellers

generate 8 categories of answers, with a higher tendency to choose intermediate answers.

Does this mean one form is right and the other wrong? No. But it should show you how even quantitative social data can change dramatically depending on the slightest change in visual queues. Stories and surveys are not quantitative data, at least not in same the sense of what engineers mean when describing measurements of current in a circuit, or measuring the amplitude of brain waves. But on a semi-quantitative level the "rare" stories can be grouped together and defined as "the set of stories whose authors all think these events are rare." The difference in the shape of the distribution is representative of how much patterns will change when the questions are presented differently. So regardless of how much fine detail a question allows, it would be safer to not consider more than 3 to 5 clusters to be "meaningful" during analysis.

Algorithmically speaking, stories with uncommon words (a proxy for describing uncommon events) show little correlation with the stories whose authors consider them to be describing rare events:
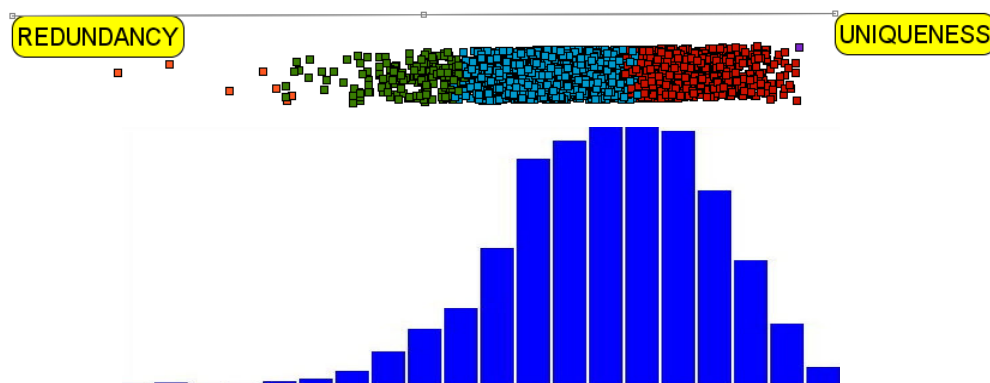
I tend to think that the algorithm may provide useful information, when compared to the author's perspective. After I refine this method, (for example, only using a set of 'interesting words' to define the story's redundancy score) I think that a derived score – the difference between the story's redundancy and the author's perception of frequency of the events in the story – may allow us to extract a set of interesting stories (those that seem contain common verbal phrases but whose authors think are rare events). Such like this is an example of using computers to aid analysis.

4.3 Computer-aided survey data

Algorithms can fill in some of the data, and is no more misleading than the human bias in surveys. The previous example (Section 3.2) compared the storyteller perspective of "how common is your story" to the algorithm-generated score. The differences are stark, but both may provide useful data and short cuts in the larger process of finding patterns. This section is just a placeholder for now – but will likely grow as more surveys rely on computer algorithms to aid pattern analysis.

4.4 Person-permanence
Inspire in people a desire to be tracked by you. The resulting data is more powerful.

According to child psychologists, "object permanence" is the ability of a child to understand that things exist even when they are not in his or her field of view. A child

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no longer feels abandoned if a parent disappears behind a tree – he knows the parent is still there.

Traditional surveys (in the pre-technological era) aimed to capture as much data as possible from a single interview; they lacked "person-permanence" in their design. They traded sample size for completeness and depended on adding even more redundant questions to the survey in order to detect a person's inconsistent answers. The Myers-Briggs personality test has 200 questions and uses this design, and takes 2-3 hours to complete. This is detrimental to the ultimate goal for several reasons:

(1) The people taking the survey don't enjoy answering hundreds of questions taking hours.
(2) The same people don't take subsequent surveys, or we don't know about it if they do, so we can't look at time trends very well.

A personality test with "person-permanence" could have thousands of unique questions and not cost the participants any of their time at all (in their minds) – Such is the personality profiling that the dating website OKCupid uses. People can answer a dozen or a thousand questions, and take any number of extra tests, all of which refine the computer matching model. Unlike the old survey model, participation is "fun" and provides an incentive to the end user (a possible date).

In the era of computers and social media, we can copy the Facebook / OKCupid model and capture more complete and accurate data by relinquishing some of the design and control to the people participating. Instead of asking all the questions, we can ask for just a minimum set (the absolute minimum is a contact email or phone number) and fill in the rest at some later date. If people have a reason to log in and self-identify, they will do it. Secondly, they will answer a huge volume of questions accurately if the incentive is right.

Facebook is a one question marketing survey that is connected to hundreds of personal, sensitive demographic questions. The one marketing question is "do you like brand X?", only Facebook doesn't pick which brands they ask about, the person chooses them. Knowing your likes and dislikes along with the preferences of most of your friends is a very powerful marketing database. So powerful, in fact, that Google is struggling to compete and decided to merge a their user records from all of its 35 web services together in order to try to build one profile that could compete with Facebook. Meanwhile, surveys in international development are running away from this more powerful model, preferring to capture lots of isolated data from anonymous people at single events, never to be cross-correlated with other data, with little thought of incentives these people have to provide data.

By using a phone, computer, or even paper survey with the right questions, we can allow people to answer only part of all the questions the first time, and fill in the rest during follow-up. This does mean that people are tracked in a system, which might feel "big brotherish," but it also means we can give people information they actually want. I prefer this to treating them as a number and giving them nothing back, since they were not tracked.

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In the extreme case, imagine if all aid recipients worldwide were tracked, their physical benefits counted, and these data provided to centralized program managers at the World Bank, IMF, UN, etc. There would be one monitoring system with thousands of overlapping analyses. Sounds crazy? Facebook already stores over 900 million individual updates every day, and the people contribute voluntarily. (And Facebook is only 8 years old!) Imagine how much more powerful a system like this would be if it ensured that people were not lost in the system? This future might be horrifying or electrifying to you, but it *is* the future either way you slice it.

4.5 Ask everyone for 2 stories
This provides 3 sets of baseline data for your questions and improves our ability to detect misinformation.

The most important rule we are enforcing in our storytelling project, the rule that makes possible a do-it-yourself approach for every partner organization, is that every storyteller must tell 2 stories. Only one of these can be around the organization trying to gather feedback. The second story must be about any other community effort the storyteller wishes to talk about. The 2-story rule ensures that at least half of all stories cannot be self-reports. Self-reports are not reliable data sources for identifying community needs and priorities.

So why bother collecting stories through our system at all?
1. **External Baselines** – if you collect 100 stories, they aren't very useful by themselves, but as part of a set of tens of thousands of stories, there will always be an external baseline. Once you have selected all stories about your topic of interest, you can then divide them by those about a particular organization and all other organizations mentioned.
2. **Longitudinal Baselines** – we've been doing this for a few years. Organizations that forgot to collect baseline data on their projects are likely to start coming to visit the data, because scribes have been collecting it for them.
3. **Within storyteller comparisons** – If every person tells two stories, you can search for a set of stories about a specific topic and then compare all of these same storytellers' other stories. The second stories will reveal other important issues unrelated to the topic. If you see strong trends in the topics among the second unrelated story set, consider those trends to be very significant to the the community.
4. These stories provide a **public record** of local feedback, and may provide a less filtered source of cause marketing and advocacy data.

How do we use the 2 stories?
If the organization is gathering all positive stories about themselves, the second half of the stories not about them should be less biased. We tag the first half as a "self-report" if the organization has any connection to scribes who collected stories that mention that same organization. And as far as self-reports go, there is always a positive bias, but sometimes you can still see differences when compared to all the other positively-biased self-reporting out there. Comparing how positive or negative

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self-reports are against all other self-reports is a fourth kind of benchmark, but not a very powerful one[56].

The "2nd story" data set is much better when searching for the root causes of complex social problems. These stories were not prompted by anyone and if the scribes are well trained, tend to provide a narrative as a series of events the led to a positive or negative outcome. When an organization reframes their evaluation as a search for other stories that describe the problems, they can find good reference data sets here.

How to we enforce this rule?

In the do-it-yourself version, organizations must upload at least as many stories about others as they do about themselves. If they don't, then their stories no longer appear online until they do. If they want their own data they can have it, but the ability to reference it online and compare it with other sets depends on obeying the parity rule.

Makes unique conclusions possible.

One thing this type of data collection allows is for every organization to learn what their **core strengths** and **missed opportunities** are relative to the community they serve. A core strength is something that they talk about doing, which is also frequently talked about in stories we gather from the places where they work. Since a wide variety of organizations are named in stories, we can also identify who should be working with based on their location and focus. A missed opportunity is an activity that local people talk about as a need that no organizations address. So within one location, all organizations may see the same "missed opportunities" but unique "core strengths" on each personalized feedback "Instavaluation™." (See Section 2.4 for more details)

4.6 Storytelling SMS game
A completely different mode of sampling that could allow different themes to emerge organically from a game environment.

This approach is a way to potentially extend the storytelling method into the realm of art, making it more real-time and conversational. Before I explain the concept of the storytelling game, let me explain why it is necessary: **Surveys are an unnatural way to gather information.**

Surveys are not
- a conversation
- an experiment
- polite
- respectful of peoples' time
- integrated into daily life
- cost-effective
- easy to integrate with other surveys
- fun.

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[56] http://feedback.keystoneaccountability.org/ provides this kind of constituency feedback benchmarked against similar organizations, if you would like to try it. It's free and only takes 10 minutes to set up.

Of course many people love surveys (analysts do, not the people completing them). They love the depth of data they provide and the structured format of the answers. They want to codify a phenomenon and reduce it to a few variables that can be studied with statistics. There are fundamental limitations to this approach:

(1) you need answers form a random sample of people
(2) most samples are not random because of sampling bias
(3) sampling error is itself an estimate, dependent on other estimates

Even if you follow guidelines for creating a random sample from (http://en.wikipedia.org/wiki/Random_sample) shown below, you can't be sure you actually have one:

- A simple random sample is selected so that all samples of the same size have an **equal chance** of being selected from the entire population.
- A **self-weighting sample**, also known as an EPSEM (**Equal Probability** of Selection Method) sample, is one in which every individual, or object, in the population of interest has an **equal opportunity** of being selected for the sample. Simple random samples are self-weighting.
- Stratified sampling involves selecting **independent** samples from a number of subpopulations, group or strata within the population. Great gains in efficiency are sometimes possible from judicious stratification.
- Cluster sampling involves selecting the sample units in groups. For example, a sample of telephone calls may be collected at by first taking a collection of telephone lines and **collecting all** the calls on the sampled lines. The analysis of cluster samples must take into account the intra-cluster correlation which reflects the fact that units in the same cluster are likely to be more similar than two units picked at random

I've highlighted the **hopeful** parts of each strategy. Any sampling strategy that depends on getting participants having an equal chance of being included cannot depend on the typical survey. All the people who are too busy, too disinterested, or too difficult to reach are automatically excluded from a voluntary survey. And how do you know the people are independent? Unless you were doing some kind of continuous survey, like Facebook, you wouldn't. So these challenges can be overcome, but not without dramatically changing the typical way information is collected, or at much greater cost.

One of those strategies is to make data sampling part of a game. But not just any game will do. The game actually has to be fun, and people must want to play it.

One idea I had was to adopt a simple storytelling game like "telephone" via SMS. In the paper version, each person writes one sentence of a story, hides any previous sentence, and passes it along to another person. That person writes a sentence and does the same. In this example each alternate person has illustrated the previous sentence:

(1) You need the tools to fix these fools.

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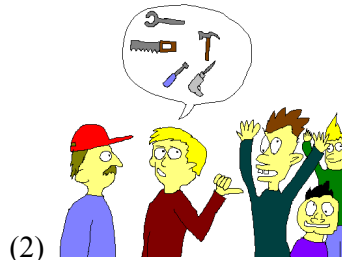
(2)

(3) No offence Hank, but these friends of yours are a bunch of tools.
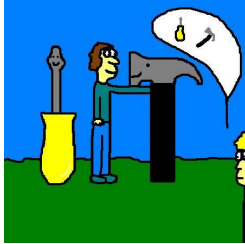
(4)

(5) Tasha Yar was unimpressed by Reginald Barclay's new holodeck fantasy because the subtext of it was that all the bridge staff were giant tools.

The game is fun, and simple to implement via SMS. If you are signed up to play, you would receive a fragment of a story and add to it. All of these messages would be stored. But the real value is when a researcher occasionally interrupts a story to interject a prompting story fragment, such as "You're HIV positive, the doctor said to the woman…" and seeing what people write to continue the story. While the ongoing story might only use one of these answers (because the story would fork at that point), the volume of possible responses could be illustrative. It reveals something about the mindset of people who might find themselves in that situation. So while the sample is not random, the types of responses are authentic information.

This strategy is closer to Facebook than a survey. By itself, one answer might not be valuable, but you have to remember that a person will provide several orders of magnitude more data during an ongoing fun diversion than during a grueling hour-long survey.

Fortune favors the patient and flexible. Large volumes of results (1000 or more) can be later codified and analyzed. Facebook serves up 900 million objects (status updates, videos, games, etc) every day to 800 million active users. The Framingham Heart Study has 5,209 people who have been followed for over 40 years. The largest ever longitudinal study "Understanding Society" includes a mere 40,000 people in the UK and costs £15.5 million http://www.guardian.co.uk/education/2008/oct/13/research-highereducation. Clearly, there's more bang for your buck in analyzing people at play than prying into their lives with a survey.

<u>**Technology**</u>
Sending and receiving the SMS to one of a group of people randomly isn't hard. Some useful tools for implementing this include Envaya[57], Telerivet, RapidSMS for Android[58], and my own Freelay[59]. Providing people with a summary of the whole story via SMS may be a little messy, but so long as the story is less than 6 messages, people might be willing to read it on their phone. Obviously, we can show the data on a website, but most Kenyans are not going to remember to access that site. Maybe it works as part of a group meeting exercise.

4.7 SMS story for story
A dumb-phone based story search engine: Share your story in a text and receive a similar story instantly.

In the current version, any person can type a story into any phone as one or more text messages, then send it to a local phone number. Somewhere in the story the person needs to include the special keyword phrase **!search!**[60]. Doing so triggers a computer listening to incoming messages to search all stories and match their text to the most relevant story, returning it as a series of messages[61]. Some real examples are found at http://chewychunks.wordpress.com/2012/03/01/sms-tool-give-a-story-to-get-a-similar-story/.

The advantages of **!search!**:
1. **Continuous data gathering** - You must tell a story to get a story
2. SMS works on every phone, everywhere. There are billions of people with "dumb" phones who will not have a smart phone for many years to come.
3. **Cheap** – costs about 20 cents (USD) a day to run the SMS-gateway in Kenya.
4. **Automated** – minimal management. One person per country needs to have an android phone running the app, and keep it topped up with credits.
5. **Scalable** – getting one person per country to run an app is much easier than Frontline SMS, which requires a laptop, GSM modem, and generally a lot more troubleshooting. GSM modems seem to go on and off the market every 12 months, and all require custom drivers to operate with Frontline SMS, so typically nobody is guaranteeing that anything will work. Android is a nearly uniform operating system and so most phones tend to work with the app. Envaya and RapidSMS have built similar versions of the gateway on Android, but both require more technical knowledge to implement at this point.

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[57] Envaya is a free, simple android app that serves as an SMS gateway, but requires you to know how to manage HTTP-POST protocols to send/receive. www.envaya.org --Televivet is the non-free version with more features but a reasonable cost (less than $10 per month).

[58] RapidSMS for Android is like Envaya and Freelay but requires advanced programming skills, and might cost you money.

[59] My free, simple android app that serves as an SMS-gateway in any country where the phone is located. You can manage messages *without any required technical knowledge* using a web interface www.globalgivingcommunity.com/freelay and receive daily email reports of all your activity. Email mmaxson@globalgiving.org to get the app.

[60] Any phrase could be coded to work. The exclamation points (!) surround the word allow the computer program to ignore messages that might contain the word search but were not supposed to be matched.

[61] The phone message goes to an android phone running a little app (Freelay) that forwards incoming messages to a central MySQL database online. Here it is matched and a series of reply messages are queued. Freelay retrieves these queued outgoing messages and sends them back to the original number. The SMS storytelling game in section 3.6 would instead assign the outgoing (modified) message to a random number in a pool of participating users.

6. **Language independent** – if you have Swahili stories in the collection, then it will match to incoming Swahili stories. The algorithm doesn't care which language, but it does need a large body of stories to be useful. If not, most incoming stories will be unique. With 40,000, almost everything gets matched.
7. **Expandable features** – anything can be built on top of the gateway. These programs simply check the database from anywhere and queue outgoing messages. A person from Washington DC could manage conversations in 20 countries from her desk, if she wanted. **On a vision level, these android based SMS-gateways allow any programmer to build "smart phone apps" for billions of "dumb" phones world wide.** The user experienced is limited to anything that can be delivered as one or more text messages, and these messages can be generated based on user codes and inputs in any incoming text message.

The biggest disadvantage was the lack of true idiot-friendly technology. After 3 years searching for something like this off the shelf, I felt I'd wasted enough time and hired a freelancer to build something truly simple to use.

Expanding the story-for-story design into full SMS conversations
If somebody tells a story and likes reading the story he or she receives, we could ask them if they'd like another. Even better, we ask them if they'd like to ask the storyteller a question about it (anonymously, of course, thanks to our SMS-gateway and 'person-permanence' model). This could facilitate conversations in situations where none would be feasible – such as groups of HIV+ people who want to talk about the disease without disclosing their status to anyone. They can talk from the privacy of their phone.

!search! also saves a record of which phone number got which story. So over time, we can learn which stories trigger more follow-up, and are therefore more useful in starting conversations, empirically.

I really like the way this promotes a desired behavior in exchange for free information. You must tell a story to get a story. If your story is too short, it will tell you to try again. You could expand that concept by prompting for more details about the person's story if they reply with an "again" and request another story. While you have the person's attention, you could ask the person for more details about themselves. Or perhaps you ask them, "What organization(s) was the story you just told about?" or "What role did YOU play in the story you just told?" Again, 'person-permanence model allows us to make the survey disappear from the minds of those participating.

These three questions (who, where, and point of view) are some of the most useful in analyzing the 40,000 stories we collected the hard way – on paper. But bit by bit, you're getting a whole lot of data at much less cost, and some of it has additional meta data. The text of the story itself can be analyzed in many ways through natural language processing, including:

1. Sentiment[62] – is the overall tone of the story positive or negative? (uses a dictionary of 10,000 words that groups of people have ranked on a scale from 0 to 10 for negative to positive emotional connotation)
2. Hierarchy of needs – provides an estimate of where to place this story, based on matching to hundreds of words related to lower/higher needs and then focuses on a position by how many times these words are repeated.
3. Redundancy – compared to all the other stories told, how unique are the words in this story?
4. Topic – another dictionary of words related to 14 areas of non-profit work guesses at which category the story is most relevant to. Some hot areas include peacemaking and human rights, economic, violence, crime & corruption, youth, HIV, health, and education.

4.8 !tag! prompting, location, and context tagging

The events that trigger behaviors and actions are probably one of the most important factors in understanding societies but are seldom tracked in development. An example of a simple meta-tag is to flag all the stories that a person receives by SMS and which seem to be interesting enough that a person asks for a second question. It's not a direct causality, but chances are the story wasn't totally useless. Suddenly you have a quality control filter for thousands of stories: Each time someone asks for another, the first story much have been interesting.

A more intentional meta-tagging method I'd like to build into this !search! tool is to train some of our paper-based scribes to host small groups of people who tell a story via SMS. Each person tells a story, gets one back, triggers a discussion, etc. The beauty of this setting is that the person who is prompting the group to !search! can send in the context of what the prompting question was. Instead of the default "Community Effort" story, one can ask, "Tell a story about the health services in your town." And then SMS that as a tag by writing "!tag! Q: health services. L: busia C: 12 women in giving circle" Any stories coming in through that same SMS gateway within an hour of the tag are tagged. (Actually I'm thinking the window will be 10 minutes before the tag until 50 minutes after it, in case the facilitator forgets to !tag! his prompt right away.) I think the question, the location, and the audience are pretty useful tags for a group of incoming stories, and might be good enough to group stories for more detailed analysis when you consider this approach has the ability to gather tens of thousands of stories.

This !tag! approach could be a game changer in allowing people to redesign surveys instantly at the point of contact with groups, so that precious information is not lost. The **traditional survey mentality** is to decide what the questions will be beforehand, force everyone to collect this information with uniformity, and then analyze everything. My alternate approach is to allow each person to choose the one prompting question that makes the most sense in that moment, use it, then assign that question and several other bits of important meta data to all responses that come from that encounter. Most one-off surveys may not yield enough data to use, but – like twitter – certain questions will "trend" and be worthy of detailed analysis by the very nature that so many intermediaries (the experts in the community) are choosing it
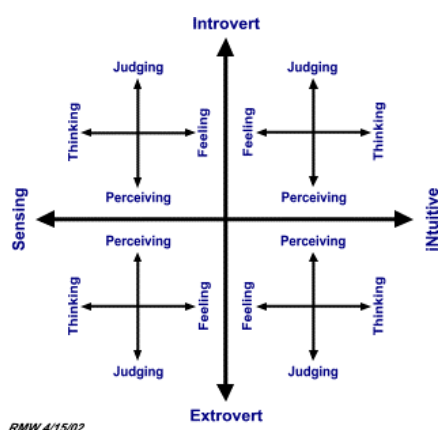
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[62] Dictionary available from PLoS One:
http://www.plosone.org/article/info:doi%2F10.1371%2Fjournal.pone.0026752

without knowing others are. You can also use a hybrid approach where the facilitator chooses one of a dozen or so prompting questions depending on the context, then !tag!s it, describes the audience, the location, and the point of view of the storytellers. Also, because people are choosing a question, there's the potential to collect narratives that are very narrowly about one subject, rather than GlobalGiving's all-encompassing "talk about a community effort" approach.

This idea is good enough I intend to test it in 2012. I hope others try the open-ended prompting approach. Hopefully these additional sections in Part III of the Real Book have inspired you to entertain the possibility that we could be on the verge of a totally expanded form of monitoring for non-profits worldwide.

4.9 Rigor from emergence, not redundancy

The Myers-Briggs personality profile (INFP, ESTJ, etc) uses hundreds of questions to play a person on four rigorous scales. Questions are redundant and balanced, sometimes asking the same question in the positive and negative form to ensure a person's response is consistent (i.e. "you often think of others when making decisions" and "you rarely think of yourself when making decisions"). This approach can quantify a fuzzy characteristic such as personality (at least how a person sees himself), but at the cost of taking hours of a person's time, and is generally not fun.

Introvert
Judging   Judging
Thinking   Feeling   Feeling   Thinking
Perceiving   Perceiving
Sensing   iNtuitive
Perceiving   Perceiving
Thinking   Feeling   Feeling   Thinking
Judging   Judging
Extrovert

RMW 4/15/02

Moving beyond individual traits to community traits provides us with a short cut: crowd-sourcing. Rather than ask a few people hundreds of questions that are not really about themselves to begin with, we ask hundreds of people a few questions. Because so many people are involved, and don't see what others are talking about, community traits **emerge** without having been measured or pre-defined by the interviewers.

There must be some optimal balance between how many questions are required to achieve a quantitative community perspective, and how many people are required. Knowing the minimum people and questions would lead to much more effective sampling of social problems, drivers, solutions.

ask many people

more reliable data

storytelling

randomized controlled trials

sensemaker surveys

board meetings

focus groups

myers-briggs

marketing surveys

many questions

more comfortable
for the respondents
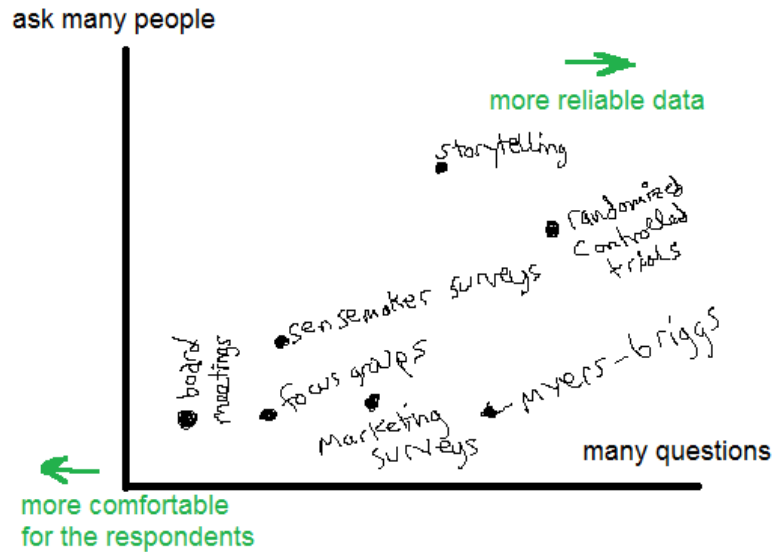
Several kinds of data collection are compared on this plot. If cost and time was included, storytelling would probably stand out as the cheapest scalable method. **Randomized controlled trials** are especially reliable, but they cost more money and take more time. In this approach the control group allows the treatment group to be asked half as many questions. In medicine and science researchers sometimes use a within-**subjects control**, where each person serves as his own control by experiencing a treatment before and after people take measurements. Another way to improve rigor is by collecting two stories from each person; the second story should be unrelated to the organization involved in collection but still a reflection of community needs, solutions, and problems. By comparing patterns in the 1st and 2nd stories, we should be able to better understand all needs, apart from those that organizations are directly involved in addressing.

Part V: Appendices

Mostly included here as part of the historical records of the storytelling project, so you can see the evolution of our thinking for yourself.

Part V Outline:
5.1 Evolution of our survey (2009-2012)
5.2 Summary of 2009 case study: Technology-Aided "Real-time" feedback loops in International Philanthropy
5.3 Last thoughts

5.1 Evolution of the GlobalGiving storytelling signification framework
Initial ideas framework for what mattered to GlobalGiving and what we wanted to learn through storytelling:

Topics related to possible narrative questions:
Community support (for a project)
Justice
Community defined
Hopes and dreams
Local leadership

Theme clusters:
Corruption, transparency, governance
Family, individualism, community
Listening, leading, following, storytelling
Attempting, achieving, failing, trying
Altruism, generosity, reciprosity, sharing, giving
Beneficiary, client, recipient, partner
Needs, hopes, wants, dreams, demands, requests, deserves

The most important question to us: (Direct Question): is this project and organization community supported?

Relates to:
What does "community" mean to you?
What does it mean for community to support?
Here is a project that does …(x)... So what does it mean in your life?
How has this project changed your life?

Other approaches that might be useful:

Tell me a story of a good leader. Why do you admire him/her?
Tell me of a time when the community needed something, and either did or did not get it.
Tell me a story of helping someone else
Tell me of a time when the community was united

Previously (2009) – we used a 3 question survey, starting with a bumper sticker:

(1) What does your community need?
(2) Name an organization that serves you well
(3) How do you know?
   (see www.globalgiving.com/ideas)

In person (2009) we tried 5 questions for video interviews of project leader and their staff:

(4) Tell us who you are. Describe the work you are doing.
(5) What does your community need most?
(6) Can you name another organization that you respect and admire?
(7) How do you know that you are listening to the people you serve?
(8) What is something you did recently (last week) to help your community?
(9) In one word – what is globalgiving?

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First coded version of signification framework, 2010, and results
Below each question, all data from 2530 stories is shown to reveal whether each triad question yields a diverse set of results. As you can see, between 3 and 7 clusters emerge for each question, but we dropped most of these in 2011 because the questions were not yielding the kinds of actionable information we wanted.

<div align="center">

Global Giving and the Use of SenseMaker Suite®:
The Signification Framework for Use in Kenya (pre-trial version)

</div>

Prompting Question

Two story streams will be pursued to seek stories related to specific GG projects and those related to generic stories of community efforts.

COMM NARRATIVE
Tell me about a community effort.
Tell us about a community effort that would either encourage or discourage others to try something similar. Describe ONE specific moment. If you have more than one to share you'll have a chance to come back to this page later.

PROJ NARRATIVE
Tell me about your project.
"What specific moment made you proud or ashamed about the project? What happened?

TITLE
Title
Please give your story a title.

Filters (Triads)

For those using paper to collect information, only one X can be placed in each triangle. Storytellers need to locate the X in relation to the three options for each question.

1.   *Benefits*
Those benefiting from the community effort in your story are…
Community leaders, community members in need, people outside the community
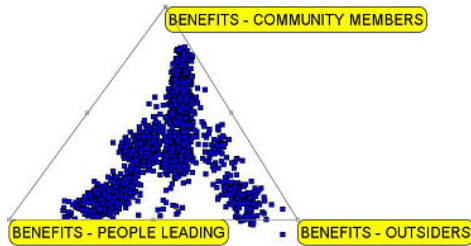
2.   *Influence on results*
The results so far have been influenced by…
Priority needs from the community, desire of a local person, wishes from people outside the community
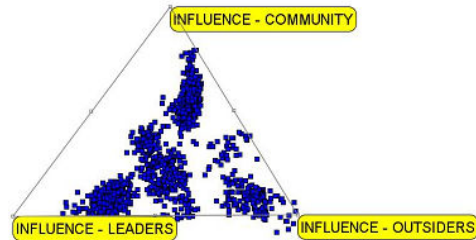
3.   *Core contribution*
This community effort improved …
physical living conditions, social relations, economic opportunities
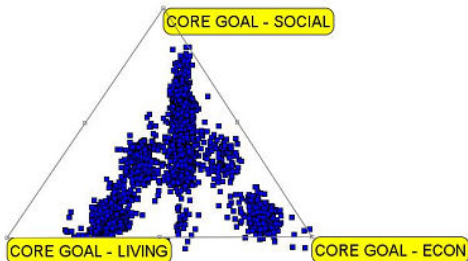
4.   *Opportunity missed*
This community effort failed to improve …
physical living conditions, social relations, economic opportunities
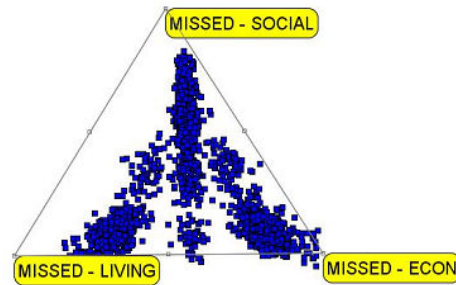
5.   *Agreement*
Community opinions and feelings about the community effort are:
United, divided, indifferent
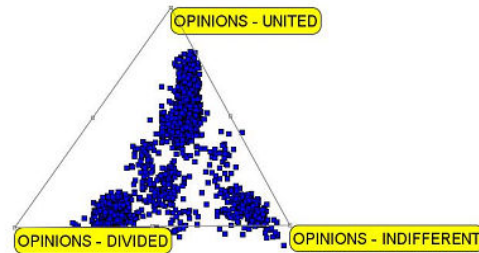
6.   *Overall result of efforts*
The community effort described in your story is….
successfully meeting community needs,
failing to meet community needs,
uncertain if meeting community needs

Alt 6. *Advice*
How would you advise a friend who wanted to do the same community effort in story? Would you change…
the people, the plan, the location
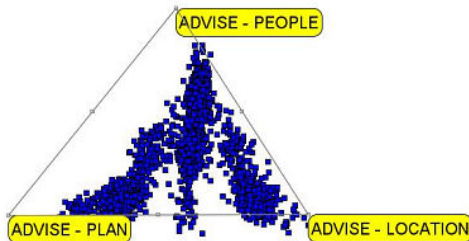
Polarities

7.   *Degree of impact*
The change caused by the community effort in the story is…
overwhelming and disruptive <--> insufficient and too slow
IMPACT – DISRUPTIVE
IMPACT – INSUFFICIENT

8. Influence of outsiders to the community
In the community effort in the story, outsiders …
meddle too much and inappropriately <--> might as well not be there
OUTSIDERS – MEDDLING
OUTSIDERS – ABSENT

9. *Decision-making*
In the community effort in your story, decisions were …
bogged down by excessive consultation <--> top-down decisions
DECISIONS – TOO DELIBERATIVE
DESICIONS – TOO AUTHORITATIVE

10. *Desirability*
The kind of community effort related to your story is …
best avoided at all costs <--> too good to be true
STORY LESSON – CAUTIONARY TALE
STORY LESSON – FAIRY TALE

Multiple Choice Questions
Pick 1 but no more than 3 for each question
11. *Own involvement*
Your involvement in this community effort can be described as …
- very involved from the start
- involved once you saw what was happening
- wanted to be involved but you were ignored and excluded
- unaware of what was happening
- wanted to be but didn't know how to get involved
- none
- prefer not to say

12. *Feelings*
The story makes you feel ….
- proud/happy
- hopeful
- indifferent
- angry/frustrated
- anxious
- don't know

13. *Needs*
Your story most relates to
(pick 1 but no more than 3)
- Access to food, shelter, work
- Sense of safety

- Social connections
- Knowledge
- Self-esteem
- Leisure time
- Creativity
- Freedom
- None of the above
- Not sure

14. *Relationship to community effort*
Your connection to the community effort you are sharing
- community volunteer
- receiving direct benefits
- government official
- international visitor
- funding agency
- organization staff member
- national visitor
- evaluator
- other
- prefer not to say

15. *Knowledge of the community effort*
You have known about the community effort in your story ….
- since the beginning, when it was first suggested
- as it was being planned
- as it was being implemented
- after it was finalized and being used
- for a few days
- do not want to share

16. *Source of information*
How did you find out about the community effort you are sharing?
- saw it myself
- someone told me about it
- information shared by leaders / officials
- do not remember
- prefer not to say

17. *Time*
How long ago did events in the story take place?
- Within the last month
- Within the last 2-6 months
- Within the last 6-12 months
- Between 1 and 2 years ago
- Longer than 2 years ago
- Can't remember

About You
18. *Where do you live?*
- District
- prefer not to say

19. *Where did/does your story take place?*
- District
- prefer not to say

20. *Sex:*
- Female
- Male
- prefer not to say

21. Age:
- younger than 10 years
- 10 to 15 years,
- 16 to 20 years
- 21-35 years
- 36-50 years
- older than 50
- prefer not to say

22. Educational level
- Basic literacy

- Primary school – started, not completed
- Primary school completed
- High school– started, not completed
- High school completed
- College /university
- Other
- prefer not to say

Revised Title
Do you want to change the title of your story? If so, the title is now…

First printed version, 2010 (results shown in place of empty triangles)
For this version, people hand-wrote answers following this paper template.

Can you share a **story** about one past **community effort** you witnessed or know about? Think of a "community effort" as any organized activity led by a person or NGO to improve the lives of *your* community. Describe *one specific* day in the life of this effort, event, or experience. Explain what happened. What came out of this effort? What would you tell others who were trying to accomplish the same goal?"

Write your story now. After, the story collector will use this guide to ask you some questions.

1.a. Write the name of the NGO that led the effort. If none was involved, write the name of a person who led the effort.

1.b. Give your story a title.

Place a dot within each triangle to represent multiple influences. Let the position represent the balance between the choices at the points. Your story can reflect a combination of these choices. If a question does not relate to your story, skip it by checking the box "N/A."

3.a. This community effort improved…
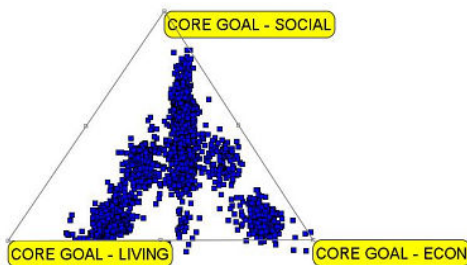
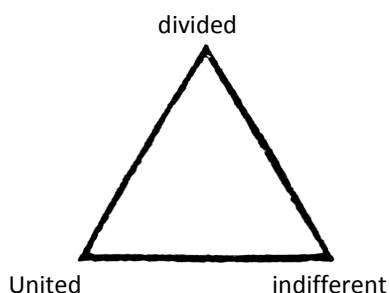**3.b.** This community effort failed to improve…
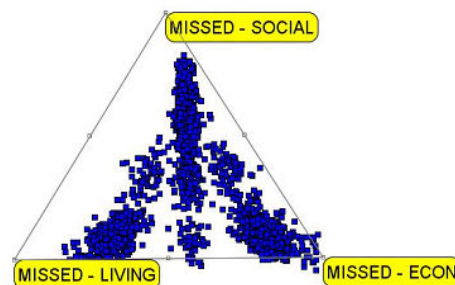
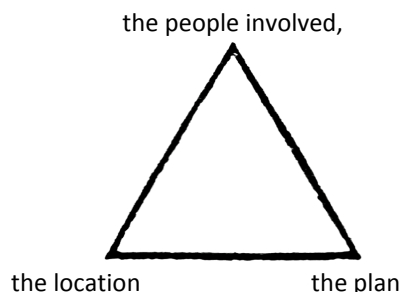**4.a.** Those benefiting from the community effort in your story are…
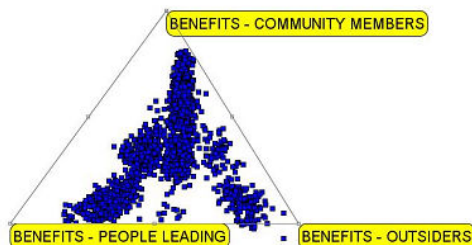
4.b. The results so far have been influenced by…

_____

## 5.a. Community attitudes about the effort in your story are…

divided

United   indifferent
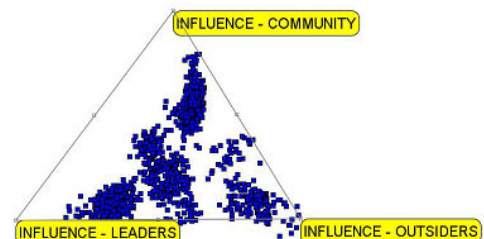
5.b How would you advise a friend who wanted to organize a similar community effort? What part could be improved the most?

the people involved,

the location   the plan

_____

Place a dot along the line to represent how closely your story aligns with each word:
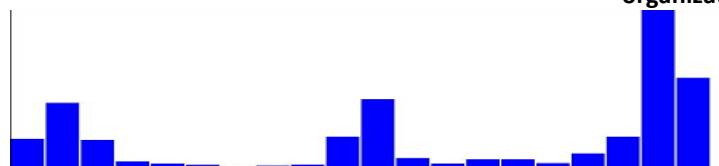
6. This story is about a community effort that…

Failed ——————————-——————-—— succeeded
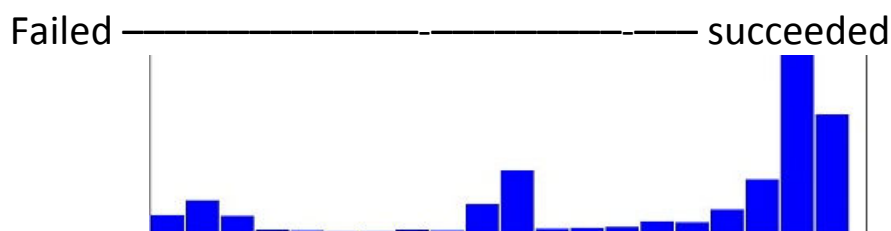
7. This story…

Would have happened anyway without an **organized** community effort ———————————-———-——-—————-——— Impossible without an **organization**'s help.

8. This story **relates** to:

[CHOOSE UP TO 3:]
_ sense of safety
_ water or sanitation
_ food
_ shelter
_ HIV/AIDS
_ other health issues

_ informal learning / training
_ social relations
_ self-esteem
_ formal education
_ creativity
_ freedom
_ none of these

_____

[CHOOSE ONLY 1 ANSWER:]

9. Your **connection** to the community effort in your story was…
_ Observer
_ Beneficiary
_ Organization staff member
_ Volunteer
_ Other

10. **When** did the story take place?
_ 1 month ago
_ 2-6 months ago
_ 6-12 months ago
_ 1-2 years ago
_ More than 2 years ago
_ Can't remember

11. **Where** does the story take place?
[Region, Village name]

12. **Sex**: Male / Female
13. Your **Age**
1-10
11-15
16-21
21-35
36-50
Older

14. **Who** most needs to hear your story?
_ Everyone
_ Leaders
_ NGO staff
_ Friends and Family
_ My community
_ None of these

15. **Other** information:
- Story collector – write your phone number
- Story giver – write your phone number if you wish to be contacted later.

Revised Framework used for 2011
Version 7.6 (used for over 15,000 stories)

GlobalGiving Story Project

Questions? Write to mmaxson@globalgiving.org
This framework is licensed from Cognitive Edge. For more information see www.sensemaker-suite.com
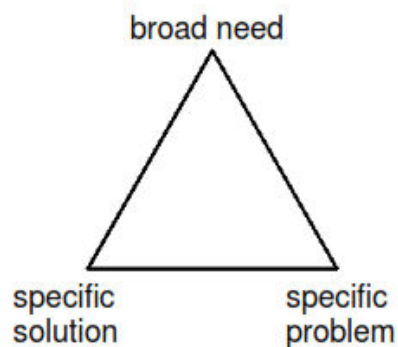
(1) Please tell a story about a time when a person or **organization** tried to help someone or change something in your community:

(2) Give your story a **title**:
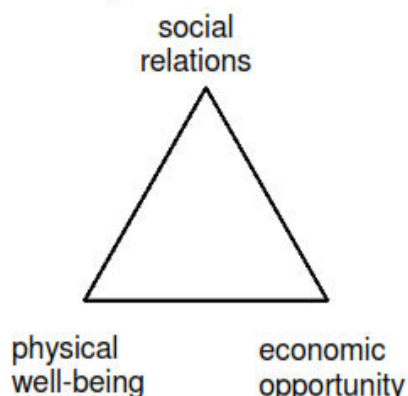
(3) Name the **organization** most involved in what happened:

(or if it is a person, just write "individual")
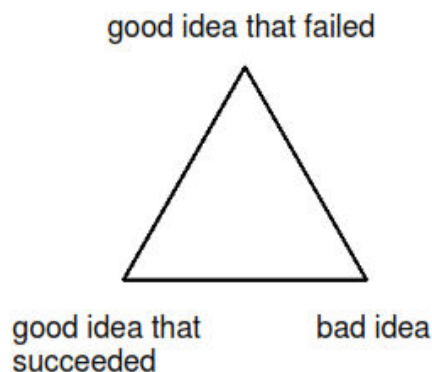
(4) Your story describes a...

broad need

specific solution   specific problem

(Draw one dot ● within this triangle to represent the balance between these three elements in your story)

1

(5) The story is about...

social
relations

physical
well-being   economic
                    opportunity

(6) The story describes a...

good idea that failed

good idea that   bad idea
succeeded

(7) Who benefited from what
happened in the story...

nobody

the right   the wrong
people   people
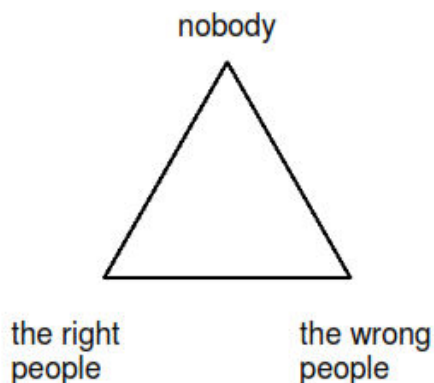
(8) How do you **feel** about your
story?   (pick 1)

O **inspiring** story I will remember
   forever
O **horrible** story, I will remember
   forever
O **important** story I will remember
   for a long time
O I **won't remember** it very long

(9) Which of these **relate** to your
story?   (pick 3)

O Food and Shelter
O Security
O Family and Friends
O Physical needs
O Knowledge
O Respect
O Creativity
O Self-Esteem
O Freedom
O Fun

(10) What is **your connection** to
what happened in the story?
(pick 1)

O **I helped** make it happen
O **I saw** what happened
O **I was affected** by what happened

(11) What happened in my story my
relates to...   (pick 1)

O **Family**
O Ethnic **group** or tribe
O Country or **region**
O **Organization**
O Other: [   ]

2

(12) When did the story take place?
(pick 1)
O less than 2 months ago
O 2-6 months ago
O 7-12 months ago
O 1-2 years ago
O more than 2 years ago
O can't remember

(13) Where did the story take place?
Country

City or District

Village or Neighbourhood or Street

(14) Your Sex
O Female
O Male

(15) Your Age
O Under 16
O 16-21
O 22-30
O 31-45
O 46-60
O Over 60

(16) Storyteller's Phone Number

(17) May we contact you by SMS?
O Yes
O No

(18) Other information:

(anything else you want us to know)

(19) Scribe's Mobile Number

(20) OPTIONAL

3

Version 9.2 (used for over 15,000 stories)

GlobalGiving Storytelling Project

This framework is licensed from Cognitive Edge. For more information see www.sensemaker-suite.com.
By filling out this form you are allowing GlobalGiving to post your story on the Internet (without your name or phone).
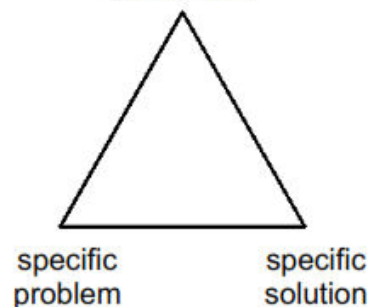
(1) Please tell a story about a time when a person or **organization** tried to help someone or change something in your community:

(2) Give your story a **title**:

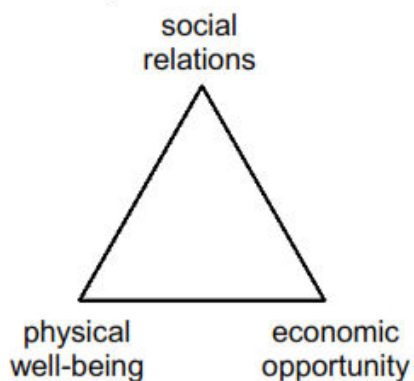(3) Name the **organization or group** most involved in what happened:

(or if it is a person, just write "**individual**")

(4) Your story describes a…

broad need

specific problem   specific solution

(Draw one dot ● within this triangle to represent the balance between these three elements in your story)

1

(5) The story is about…

social
relations

physical
well-being

economic
opportunity
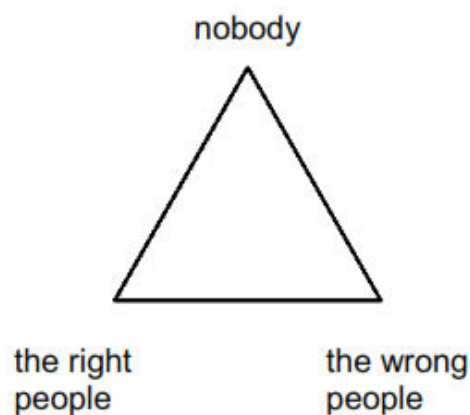
(6) The story describes a…

O **Good** idea that **succeeded**
O Good idea, **worked somewhat**
O Good idea, **should have worked** but did not
O Bad idea that worked despite itself
O Bad idea that **failed**
O **Bad** idea that will **never** work

(7) Who benefited from what happened in the story…

nobody

the right
people

the wrong
people

(8) This story makes me **feel**: (pick 1)
O Happy
O Hopeful
O Inspired
O Indifferent
O Disappointed
O Frustrated
O Angry

(9) Which of these **relate** to your story? (pick 3)

O Food and Shelter
O Security
O Family and Friends
O Physical needs
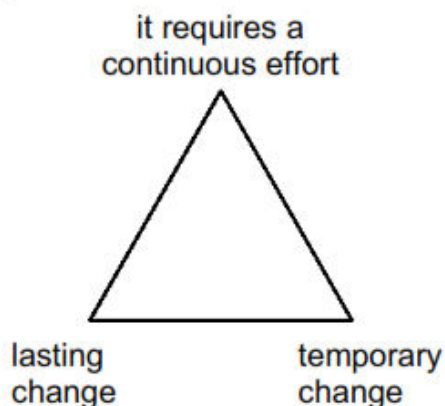O Knowledge
O Respect
O Creativity
O Self-Esteem
O Freedom
O Fun

(10) What is **your connection** to what happened in the story? (pick 1)

O **I helped** make it happen
O **I saw** what happened
O **I heard** about it
O **I was affected** by what happened

(11) What happened in the story relates to: (pick 1)

O **Myself**
O My **family**
O **Friends**
O An ethnic **group** or tribe
O **Community**, region, or country
O An **organization**

2

(12) What type of change is your story about?

it requires a
continuous effort

lasting change   temporary change

(13) Events like those in my story happen…

rarely ├────────────┤ often

(how often: place a ● on the line)

(14) When did the story take place?
(pick 1)
O less than 2 months ago
O 2-6 months ago
O 7-12 months ago
O 1-2 years ago
O more than 2 years ago
O can't remember

(15) Where did the story take place?
Country

City or district

Village, neighbourhood, or street

(16) Your Sex
O Female
O Male

(17) Your Age
O Under 16
O 16-21
O 22-30
O 31-45
O 46-60
O Over 60

(18) May we contact you by SMS?
O Yes
O No

(19) Storyteller's Phone Number

(20) Scribe's Mobile Number

(21) Other information:

(anything else you want us to know)

(22) OPTIONAL QUESTION

(question provided by our local partner organization)

3

5.2 Summary of Technology-Aided "Real-Time" Feedback Loops in International Philanthropy[63]

In 2009 beneficiary feedback forced a Kenyan youth sports organization that was not serving its athletes well to reform over a six-month period. Ultimately, this continuous and transparent feedback triggered a chain of events that caused the original organization to implode and a new, more responsive organization to emerge, led by the one-time ignored community.

We found that a crucial first step was to explicitly **ask** for frequent and honest feedback (by email, the web, and word of mouth). The next step was to **reinforce** our request (e.g. by handing out bumper stickers like "1-800-How's my driving?" and hosting meetings with the community). Finally, transparency means giving this feedback **real weight** in our evaluations, and letting the community make the final call on whether to remove the organization from GlobalGiving. The most important lesson is that even when beneficiaries were granted **power over the organization**, local athletes continued to defend the organization's right to represent them until the moment a better alternative emerged. Likewise, true transparency has to be about sourcing **legitimate solutions** and **finding alternates** to dysfunctional institutions, not merely complaining about what's not working. Local community members often understand this better than anyone else, because they have to live with the consequences.

Key steps:
1. Ask for feedback
2. Ask again (reinforce the message)
3. Treat feedback as a worthy part of an evaluation
   a. Devise a system to filter out the positive-bias from the data, and increase the amount of unbiased feedback from adjacent sources
4. Let the community decide the fate of a questionable organization
   a. Complainers won't kill something that is a net positive benefit to them
5. Find alternatives that help the people benefit in the end

5.3 Last thoughts
This whole approach to evaluation is meant to avoid creating a **whistleblower's dilemma:**

Imagine you are a mother in a village and you see that half the money sent to the local clinic is wasted, what do you do? You could tell someone from the funding agency when they visit and hope they get to the bottom of it. What do you think will happen? Assuming you can prove it and they believe you, what should they do? Should they pull out of that clinic? They typically don't have the power to replace the staff, and the courts are usually too messy to hold corrupt leaders accountable. In most cases the funder leaves and spends its money elsewhere. Now what? You were courageous and honest, and where half a functioning clinic once stood you have none. A lot of good that will do you, not to think of the type of local backlash closing a clinic would yield to you. Because they can't really hurt the funder, they attack you instead.

Transparency to most people is about as giving this person the ability to complain about the clinic, or giving the community the ability to complain about the funder. Transparency ought to be about systems that prevent this clinic from becoming corrupted in the first place. As a direct

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[63] http://blog.globalgiving.org/2009/09/16/we-are-listening-real-time-feedback-loops/

result of the broader way that local people see transparency, they tend to be "experts" at evaluating outsider's evaluations. Most will ask themselves, "how will my input impact the local corruption problems?" We could be using people's skepticism as a signal that we aren't addressing the root cause of the problem.

Does your M&E system serve the very individuals who provide the feedback?
Seeing the problem from the villager's perspective helps us understand how a different system for feedback can help. Most of the time organizations are measured against the goal of serving many people, not by how they serve one individual who might take the risk of talking about problems they see with an organization. He/she is just one person among the people. Under these circumstances the risk to the individual is only worth the reward (solving the problem) if the system makes it a top priority to actually solve the problem, not just direct resources elsewhere. This remains a dilemma for GlobalGiving. We can highlight gaps and failings, but other people allocate the money, so we can't guarantee to those courageous enough to provide feedback that the problem will get solved. The closest guarantee we can make is that (a) donors will know about it and will be allowed to reallocate the money elsewhere, and (b) those providing the feedback will always hear back from us, and sometimes receive a little bit of GG GiftCard money to allocate to a (better) project of his or her choice.

Multiply this situation by the thousands of grants to tens of thousands of organizations that the world tries to manage each year, and you see a systematic bias towards projects that accomplish "enough" of something to avoid getting punished, instead of a system for rewarding those that accomplish the most.

Why I really wanted to write this book:
It strikes me that **monitoring and evaluation** (M&E) is like a peanut butter and jelly sandwich. The bread represents the monitoring framework, and the filling, structured evaluations. What you put between two slices of bread will affect the quality of the sandwich, but international development is full of moldy bread. We learn too little about the world where we work and we learn it too slowly to act on what we do learn. We need "fresh bread" and a system to know when our bread is moldy. We need a feedback system that will work for every sandwich maker out there. With that in place, we can all build every sort of tasty sandwich and begin to have a meaningful discussion about what we are doing in communities. The world is a buffet and this book about making everything taste better.

I hope I have presented stories here that illustrate how we can improve M&E through a structured continuous storytelling process.

I called this book is the "Real Book" and not a "Methods Book" because it was written to be revised, expanded, truncated, filled in, and improvised with like Jazz. Hopefully it will spark more complete ideas in the future. And maybe great evaluation "musicians" will replace it with a new set of standards endorsed by the fact people are "playing" them worldwide.

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- http://chewychunks.wordpress.com/storytelling -- my blog, with many more examples of analysis and design principles