emPOWER TOOLS
THE CAPACITY COLLECTIVE

COLLECT MEANINGFUL DATA: Tracking Client Stories Over Time

Purpose: Stories are powerful because when they are told effectively, we tend to respond to them in more meaningful ways than we do to facts or figures. Your work has real impacts on the communities that you serve. The stories of your clients' perseverance, hope, and success can and should be shared with a wider audience. In this emPower Tool, we will discuss the types of stories, and the methods you can use to collect and tell your clients' stories.

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What to Track

Quantitative Data (the numbers):

- **Outcomes** and indicators your organization want to track **over the life course** of your clients
  - Current outcomes that you are obligated to report to funders
  - Other outcomes that fit with your organization's mission and objectives (like "improving lives…")
- **Client and service characteristics**
  - These characteristics should be related to the above-mentioned outcomes (see example in the right column)
  - Tracking these characteristics will help identify, 1) the impacts you are making on clients, and, 2) potential changes you might want to make to your program

Qualitative Data (the stories):

- Life course narratives (audio or visual) from your clients about their experiences with your services
- Narratives (audio or visual) from your staff about their work with your clients
- The qualitative data you collect—whether they are images, or recorded oral histories—can showcase changes and growth in your clients over time
- *See the **Collect Meaningful Data: Beyond Numbers–Collecting Qualitative Data** emPower Tool*
- *See also the **Collect Meaningful Data: Capturing Stories with Photovoice** emPower Tool*

Why Track Client Stories?

Long-Term Success of Your Clients

- Assess the effectiveness of your services
- Strengthen connections to supporters and funders
- Identify needed improvements to your services

Example: Tracking a Client from "Cradle to Career"

1. You assess Leyla's development by using the ASQ-3.
2. You notice her score is low in the Communication area, so you refer her to a speech pathologist.
3. You reassess Leyla's communication development over the next few assessments to see if the intervention is working.
4. Leyla graduates from the program.

This could be the end of the story, or…

5. You check in with Leyla and her mom every 1-2 years via a short interview.
6. Year 2, Mom reports Leyla was more confident about starting school because her speech was on par with her peers, but she wishes she had started sooner.
7. Year 6, Mom reports Leyla's speech is on track, and she's doing well in school.
8. Year 12, Leyla tells you she graduated from high school with honors.
9. Year 18, Leyla tells you she is going to graduate school for speech pathology.
10. You have several success stories for newsletters, board reports or grant applications, and clients to showcase and/or speak at future fundraising events.
11. You also have confirmation that your intervention was successful in the long term, and an idea for program improvement: assess and refer even earlier.

Assess Client's ASQ scores → If the scores are low in communication area, refer Client to speech pathologist → Client A leaves the program → Follow up with (former) Client to see if communication outcome improved → Keep following up for long term impacts

Tracking After Graduation: Potential Challenges	Tips for Success
It may be difficult to locate former clients	1. **New Clients.** Revise intake form to ask for email addresses, multiple phone numbers, and social media accounts. 2. **Current Clients.** Make sure you have an email address, at least one phone number, and if available, social media accounts. 3. **Upon Exit.** Have clients sign a consent form to give permission for follow up; check contact information again at that time.
Resources for your organization are strained already, so you may find it difficult to devote more to tracking client stories	1. **Choose your Measures.** What do you want to know in the short term and long term? Go back to your mission/vision, and your program's main objectives, for inspiration. 2. **Choose Your Timeline.** Set up a consistent timeline based on what you want to know and how long you want to track (such as every 6 months for 2 years, or every 2 years for 10 years). 3. **Create Your System.** Develop tools to collect follow-up information each time (forms, surveys or assessments), and create and maintain a database of contact information with multiple points of contact for each client. 4. **Weave Story Collection into Existing Processes.** Where possible, include questions and tools during home visits or touch points that would already be occurring as part of the program—not extra. For example, include questions at intake, throughout the program, and/or at exit—then continue asking after graduation. *TIP: If you have programs that work with clients across different ages, develop common questions to ask across all programs so you can track changes and outcomes over time!* 5. **Keep in Touch.** Use your organization's social media (or your program's) to keep in touch with former clients. You can also use social media to showcase your clients' and staff's stories! Every time you check in, verify all of the contact information.

Connect with Supporters

Curate the stories to highlight your organization's direct and indirect impacts on clients, and on the communities you serve.

> *Stories will help supporters identify with your work and your clients, and in turn, help your organization's cause become more personally meaningful.*

Present the stories in an eye-catching design to grab attention.

> *People are attracted to beautifully designed content, like an infographic or images.*

Integrate stories into awareness-raising and fundraising campaigns.

> *Images, quotes, videos, and other quick-impact forms have more impact than words, especially anything longer than a few lines (many won't read a paragraph but will watch a video).*

Demonstrate Community Impact Over Time

1. Establish a Baseline

- What are the disproportionate impacts or other social issues facing the communities you serve? These issues may have informed your organization and program goals
- *Example: Women of color (WOC) more likely to die during childbirth than white women*
- TIP: *See the **Amplify Your Story: Using Public Data** emPower Tool on how to find research and data on issues impacting the communities you serve*

2. Understand Root Causes

- What are the SYSTEMS and MISPERCEPTIONS that are creating these inequalities, beyond individual factors? Use these to shape your measures
- *Example: WOC are perceived to have a higher threshold for pain than white women.*
- *Example Measures: Tracking interactions with, and suggested interventions from medical personnel during birth. Also track racial identities of clients*

3. Direct Your Interventions

- Shape your programming to directly address the issues you want to impact
- *Example Intervention: Provide annual "report cards" to hospitals on how their personnel are interacting with WOC based on the data your Doulas are collecting*

4. Track Your Outcomes Over Time

- Track the same measures at every birth over the course of months or years.
- *Example: Have every Doula complete the same form at every birth for 5 years*

5. Compare Your Outcomes to the Baseline

- Show your outcomes in comparison to the baseline, and to national/state averages
- *Example: Show that the mortality rate for your clients of color is changing over time, and show how your rates differ from state/national rates – this indicates that your intervention (the report cards) may be having an impact on WOC birth mortality*

Thank you for supporting our work! ***Special thank you to Joice Chang for her work on this tool!***