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NARRATIVE ASSESSMENT

A new method for monitoring, evaluating, learning, and communicating about advocacy

NARRATIVE ASSESSMENT
A NEW METHOD FOR MONITORING, EVALUATING, LEARNING, AND COMMUNICATING ABOUT ADVOCACY

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PREFACE

Narrative Assessment is a new way to monitor, evaluate, and communicate about advocacy. It has come about because of a need that we have seen among civil society organizations doing advocacy work, as well as their donors. With Narrative Assessment, we want to help organizations to bring out what advocates really do, the challenges they face and address, and the meaning of their achievements. This can be helpful to bring teams and networks together and develop more shared understanding. It can help in communication between organizations and donors. In addition, it can help organizations to communicate with their audiences and support bases.

This manual is an introduction and practical guideline for program or project managers, advocates, Monitoring and Evaluation (M&E) professionals, and Communications staff. We think it is also relevant for donors seeking ways to monitor, evaluate and communicate about the advocacy programs they support.

In this manual, we tell what Narrative Assessment is and what it can be used for. It also charts the different steps involved with Narrative Assessment and offers practical advice on how to carry out a Narrative Assessment.

For those with further interest, we also offer an in-depth discussion of the theoretical background of Narrative Assessment, including a discussion of how it relates to other methods.

If you are interested in trying out Narrative Assessment or learning more, do not hesitate to contact us at **info@narrativeassessment.org**.

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01 INTRODUCTION

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Monitoring, evaluating, and learning for advocacy is notoriously difficult. Efforts usually do not lead to impact directly. Many actors and factors influence how change happens, and evidence is often hard to come by. With conventional reporting, it is also impossible to do justice to the difficulties involved in many contexts, to recognize advocates' capacities, or place achievements in a longer process.

To address these challenges, Hivos and Wageningen University have developed a new monitoring & evaluation (M&E) method for advocacy, *Narrative Assessment*. This new method creates plausible stories about advocacy processes, achievements, and challenges from advocates' perspectives. An advocate and a trained Narrative Assessment facilitator co-produce these stories. The facilitator helps the advocate to create a real-life story about advocacy work.

NARRATIVE ASSESSMENT IN A NUTSHELL

Narrative Assessment revolves around building stories about advocacy and its subsequent usage for learning, monitoring, evaluation, and communication.

Narrative Assessment uses stories to clarify how advocacy works and how it relates to advocacy outcomes. The stories unveil what happened, how, and why. They tell, for example, which decisions were made and how, and which strategies were followed, even while consequences were not clear, adversaries made their own strategic moves, and contexts kept changing.

The heart of Narrative Assessment is, thus, formed by the stories of advocates about their work. Stories revolve around their experiences, their knowledge, and skills that go into making sense, deciding, and acting on opportunities, challenges, and dilemmas. Through the co-construction of stories by advocates and a Narrative Assessment facilitator, the causal links between advocacy and outcomes are explored and substantiated to develop plausible accounts of contributions to change. This way of working does justice to the dynamics of advocacy within specific contexts, it tries to bring out and assess the plausibility of claims made in, for example, outcome harvesting.

However, Narrative Assessment does not have to focus on, or start with, outcome findings. Stories can also be built around other dynamics. For example, stories can tell how a program developed. They can tell about the challenges a program faced with changes in a political context and how these were responded to or describe how hard lessons were learnt. Importantly, challenges and failures that are all too common in advocacy work can be meaningfully incorporated. That is the beauty of Narrative Assessment stories, making use of the fact that a good story will usually partly revolve around challenges.

Narrative Assessment stories are different from, for example, most significant change stories that tell of successes. They focus on bringing out the true nature of advocates' work and their understanding of what happened, and they are told in their voice from their perspective. These stories let audiences follow the ins and outs of advocacy in context, thus capturing the work of advocates in an interpretable, personal way. These stories bring out the skills and knowledge of advocates in relation to the action and results. Narrative Assessment stories thus put advocates at the center. This is because advocacy knowledge and skills are deeply rooted in advocates' experience and knowledge of how to maneuver in complex and dynamic contexts. Their knowledge and skills are gained and shared through learning in action;[1] by experience, facing failures, and learning from doing so; through in-service training and real-time hands-on coaching. Narrative Assessment builds on these well-established traditions while current M&E approaches do not acknowledge or facilitate the identification and sharing of this knowledge.

Box 1. Plausibility

Plausibility is defined here as the quality of seeming likely to be true. Building and examining plausibility of stories is central to Narrative Assessment. To build plausibility, Narrative Assessment stories are co-constructed between the advocate as lead author and the Narrative Assessment facilitator in the role of critical friend. The facilitators are to seek detail, assessing consistency and plausibility of statements, embedding in context, clarification, and where possible, signs of evidence. In this way, Narrative Assessment facilitators test the believability of stories against alternative interpretations, undermining gaps, and apparently empty claims. In this way, Narrative Assessment offers a new direction for conceptualizing rigor, drawing on the narrative inquiry research tradition.[2]

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The method is also different from other story-based methods in that it emphasizes the plausibility of stories. By creating stories in a way that makes them believable, and puts this believability to the test, Narrative Assessment seeks to comply with evaluative quality criteria emphasizing rigor. It helps advocates build stories that inform and inspire peers while also seeking to be more acceptable and convincing to evaluators, donors, and other advocates than the more common 'success stories,' because of this rigor. This makes Narrative Assessment especially useful when objective evidence is hard or impossible to come by. This is often the case with advocacy.

Narrative Assessment stories provide new insights that are meaningful to program because they provide rich grounded understandings about how and why things happened as they did. They show strengths and challenges and capture contextual dimensions, local capacities, and advocates' sense-making that other methods do not easily convey.

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Narrative Assessment stories can help organizations, stakeholders and donors understand and learn, build shared understandings within and across country teams and different levels, recognize different voices, (re-)strategize and improve or (re)design communication.

Narrative Assessment builds on Theory of Change thinking and storytelling. It does not compete with or replace other methods such as Outcome Harvesting but supports a meaningful use of their findings and the development of deeper insights.

THE ADDED VALUE OF NARRATIVE ASSESSMENT

Through the use of Narrative Assessment stories, monitoring, evaluation, learning, and communication about advocacy can be strengthened in various ways. The key ones are highlighted below:

Realistic and contextualized sensemaking: Facilitated storytelling strengthens advocates' sense-making which helps them reflect on their strategizing and usage of their knowledge and skills. Through a Narrative Assessment, advocates may experience that for the first time, their actual work and ways of going about their work are put into words and can finally be shared with others. This can strengthen advocates and the programs in which they work. For example, Narrative Assessment stories

support advocates to reflect on and address questions of strategy, gaps in strategic thinking, and assumptions about the capacities of those involved. The stories make explicit advocates' strategic considerations and the assumptions underlying these. This enables the revisiting of starting points and claims about the effectiveness of strategies. A subsequent collective inquiry into and sense-making around these considerations, assumptions, starting points and claims, and how they relate to advocacy results, puts them to the test. This can drive learning and reflection. Narrative Assessment, thus, links advocacy results with advocates' frustrations, joys, dilemmas, disappointments, and challenges. It seeks to explain the connections and attach meaning to them. It can thereby support more realistic collective reflection on assumptions, strategies used, and contextual developments. The stories improve the ability of teams to analyze what works in a context, supports knowledge sharing, building of mutual understandings, and acknowledgment of diversities.

Team building, connecting levels, (South-South) sharing: Narrative Assessment stories inspire other advocates within and across teams by making visible how, for example, they created or jumped on opportunities, or dealt with challenges under similarly difficult circumstances. It can also help to build team cohesion and solidarity, as stories from colleagues working in similar circumstances show they are not alone. Sharing and talking about richly developed stories together leads to the development of understandings between advocates working in international, regional, national, and sub-national arenas, thus strengthening the connection and respect? between levels, which strengthens strategizing.

Local ownership and amplification of voices: Narrative Assessment is consistent with the narrative forms of knowledge and learning found in many local knowledge systems. Narrative Assessment recognizes local knowledges and makes these visible, thereby supporting local ownership. Narrative Assessment stories also provide accounts of advocates that are told on their terms and embedded in their context. The stories produced by Narrative Assessment, therefore, amplify local voices.

Engagement and support: Reporting advocacy results can easily render advocacy meaningless for publics beyond a very small set of insiders. Lack of impact on constituencies can easily be mistaken for lack of significance if this significance is not articulated. An adjustment to a policy document may be a result of great, long-term effort by advocates. However, making clear what such changes may mean to constituencies or society requires special attention. This is not just because policy processes are technical. Advocacy results are often interim in nature, and require further policy influencing in order to attain clear evidence of change for the ultimate beneficiaries such as improved access to clean water, or a living wage. Advocacy achievements are often small, intermediate steps that have real meaning only in the light of a larger future outcome. Narrative Assessment can contribute to making internal as well as external communication more realistic and appreciative by bringing out the meaning of these intermediate advocacy results.

NARRATIVE ASSESSMENT AND OTHER M&E METHODS

Current M&E methods such as Most Significant Change, Outcome Mapping, and Outcome Harvesting produce findings on results. Narrative Assessment can significantly strengthen them by building on their findings. It is most suitable for zooming in on selected aspects or developments in an advocacy program (a set of interrelated advocacy activities over a period, carried out by an organization or collective of organizations)) that merit further study and communication. In this way, Narrative Assessment complements and deepens rather than replaces other program monitoring and evaluation methods in use. In the appendix, more can be read about how Narrative Assessment relates to other M&E methods.

Narrative Assessment is distinct from other M&E approaches, in that it is specifically tailored for advocacy, by starting from three premises.

First, in a challenging and changing environment, advocates' efforts are often countered or aided by forces much more influential than their actions. Small advocacy efforts may bring big wins, whereas huge efforts may be required to merely halt or delay a negative development. In advocacy work, these often-invisible dynamics are the key to establishing causal relations between advocacy efforts and outcomes with some degree of plausibility. However, they are generally black-boxed in current M&E approaches. This blocks understanding of how results were achieved, leading to unsupported assumptions of direct linkages between advocacy and its results. Narrative Assessment makes the otherwise largely invisible dynamics of the advocate's environment an explicit focus of attention.

Second, stories enable connecting and interpreting the complex and contradictory signals of a messy world.[3] Narrative Assessment stories bring out dilemmas and challenges faced by advocates and the way they have acted upon them using their experiences, skills, and knowledge. In this way, Narrative Assessment stories uniquely illuminate the dynamics of advocacy and the real contribution of efforts. This, in turn, allows for insightful descriptions of advocacy work in relation to advocacy results.

Third, Narrative Assessment is not just about storytelling. It uses scientific criteria of narrative inquiry to ask hard questions, tease out the relevance of failures and achievements, critically examine claims, and test and validate stories, thereby strengthening their plausibility and thereby, credibility.

STRUCTURE OF THIS MANUAL

Chapter 2 will explain how to set up a Narrative Assessment. Chapter 3 details the way Narrative Assessment stories are produced. After that, Chapter 4 will go into the different usages of these stories. In Chapter 5, questions of ownership and safety are addressed. An appendix provides in-depth discussion of the theoretical background of Narrative Assessment.

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02 SETTING UP A NARRATIVE ASSESSMENT

Advocates, managers, M&E Staff, consultants and/or others conducting the Narrative Assessment, and possibly other stakeholders (organizational staff, allies, and partners), define the parameters of the assessment. These parameters are:

1. For what and for whom? Defining the purposes of the assessment. Specifying the purpose as clearly as possible will help get valuable stories, since those involved will have selected a specific direction together and, as a result, will know what to focus on. For example, the purpose could be to learn why certain parts of a program were much more successful than others in a certain year; or, what certain advocates did to contribute to a remarkable success; or, why the replication of a success in a new context yield expected results, and so forth.

2. What? Picking the program or the part of to be covered. For example:

- In contributing in-depth information about a program for an end-evaluation report, a team might select a certain advocacy trajectory that has taken place and belongs to the heart of a program; for example, in terms of centrality to objectives, exemplary nature of the work done, or challenges faced.
- Because of unexpected outcomes (good or bad) using a novel strategy in a campaign in a country program, an organization wants to know if there are important lessons to learn for other countries.
- Because of setbacks in a country program, the organization expects to unearth a story about the role of context change that it wishes to share internally or communicate externally.

3. Who? Identifying the advocates who have carried responsibility for programs and whose inside information or role make their participation key to the assessment. Narrative Assessment commonly revolves around a collection of related stories (e.g., from different CSOs working together in a country program; from different advocates working together directly on a campaign; from different country teams working on a single theme in a program). Depending on the purpose of the Narrative Assessment, advocates can be selected for interviewing who may have the best insider information. In any case, only those who have relevant first-hand experience of what happened are relevant potential interviewees.

4. When? Stories gathered right after important events to capture their unfolding will be different in scope from stories capturing a longer period that tell about a series of developments over time. They will be less detailed but can show the interconnections between larger developments. It will also be harder to conform stories told from a distance, but that greater distance may support deeper reflection. The 'when' question is thus not just a matter of planning; it may also shape stories' qualities.

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03 GUIDELINES FOR CREATING NARRATIVE ASSESSMENT STORIES

INTRODUCTION

Creating a Narrative Assessment story consists of four main steps.

1. Inviting interviewees
2. Preparing narrative interviews
3. Conducting narrative interviews
4. Distilling stories from the narrative interviews

Each step involves different aspects. Below, the different steps and their aspects are explained.

STEP 1:

INVITING INTERVIEWEES

There are two types of Narrative Assessment stories. Some stories can be told by a single advocate, while other stories recount a collective effort or a longer history, involving different people over time. In that case, several interviews will need to be integrated into a larger story or stories (see Step 4). Potential interviewees need to be approached in a way that makes the relevance and nature of the exercise clear.

Narrative Assessment is a special experience for many advocates for whom it may be the first time to talk about their work from a deeply personal perspective. Generally, people will be pleased to share their stories, but it will be helpful to explain this special nature, the purpose of the Narrative Assessment and what is expected of them, also in terms of time investment (up to 1.5 hours of their time plus the checking of the story draft). How interviewees are invited to interviews has two important effects. First, done right, those invited become interested in participating. Second, how you introduce yourselves and your purpose will immediately begin to shape their expectations, which will affect what they share.

Participants must agree to what they are getting into, what will be expected of them, how their identity can be protected, and what will be done with the stories they share. This informed consent must be secured before the interview takes place.

STEP 2:

PREPARING NARRATIVE INTERVIEWS

Interviews for Narrative Assessments are not like other interviews. A narrative interview is an interview that does not revolve around questions by the interviewer but helps someone tell their story. For Narrative Assessment, the facilitator helps set up the story, does very little but listen while the story is being told, and then asks questions after that enrich, clarify and build plausibility. Narratives have a beginning, a middle, and an end. The role of the facilitator is, thus, very different from that of a normal interviewer.

Right before the interview, four actions must be taken to prepare the interviewee. Together, the four actions may take about 20 minutes.

1. Preparing the interviewee for telling a story

The facilitator starts by explaining Narrative Assessment and the question or interest that motivates the interview. Many interviewees will be used to reporting and reports are not stories. Therefore, Narrative Assessment requires a mental shift. The stories Narrative Assessment seeks are personal: they encourage advocates to open up and share personal knowledge of developments in their work, in the form of stories from their perspective. While many people share stories frequently outside of work, a preparatory conversation and supportive interview can help bring about and sustain this mental shift. One strategy here is to lead by example. The facilitator, for example, could share with the interviewee how this interview came about.

2. Getting a sense for the story

While the purpose of the story will be defined already (in Step 1), the interviewee and facilitator should agree the story is to be that of the interviewee. Together, the interviewee and facilitator go through the following steps to prepare the telling of the story.

It is crucially important to have at least some sense of the story before the interview starts. All stories have plots. They are an account of interconnected developments over time, with actors taking action, leading to some result. Stories are rich accounts of *things that happened over time.* For a good story, the interviewee must know what happened first-hand. Often there is a main message, something meaningful to the interviewee regarding these events, and the reason to tell the story – defining how it is built up. This main message defines the plot. For example: something was learned, something worked out, or failed for reasons the interviewee understands. The NA facilitator needs to keep this in mind as, in some cases, the interviewee may not have the message of the story all figured out before the interview and the account can be messy with various back and forths.

However, having some sense of what the message is *about,* and keeping what it is about in mind, is important for helping the interviewee to tell a story. It will be clear to them what is to go into the story. The exact nature of the message will develop through the telling of and through the facilitator's probing questions about the story, helping to release memory and make sense of events and actions. This interaction may be the first time the interviewee reflects deeply on what happened and its meaning. This reflection will help the interviewee learn from the interview themselves.

The interviewee and the facilitator explore the question of the message until the interviewee finds they have defined it enough to tell the story, and the facilitator helps to make sure the story is rich and serves the purpose of the Narrative Assessment. A simple way to do this is to establish with the interviewee what the story is going to be about. There are two elements to this that both need to be discussed:

1. **What is the *theme* of the story:** the set of things that happened that will be talked about. For example: how we changed our strategy from trying to have conversations with the government agency to organizing protest.

2. **What is the *message* of the story about:** For example: what we learned along the way that made us realize we had to change our strategy in this way.

While the theme will always be identified in advance, there are times where the facilitator and interviewee will discover important messages during their interaction. These unexpected findings, messages that become visible during coached reflection, are a key contribution of Narrative Assessment. When these occur, it may be wise for the interviewee to name these new points and to explore these new messages further. One of these newfound messages may become the theme of the story.

Once the theme and message are adequately clear, it is possible and necessary to delimit the time and scope. If the timeline is too long and the number and types of actions too many and complex, there will be little chance to create a story with sufficient detail and context to be insightful and convincing. A clear idea of where and when the story starts and some discussion of how to pick which details to include (and often more importantly, exclude) along the way is necessary. The scope should be set so there is enough time to go into important details, clarifying things like crucial turning points at events, explanations of strategy, and reflections on reasoning at the time.

Box 1. Setting scope

A way to set an appropriate scope is for the facilitator to discuss with the interviewee beforehand what developments the story will discuss, also going into the kinds of details that are important to show and make understandable how things happened. This can help the interviewee decide what story could be told within an hour. In addition, a facilitator can decide to adjust the scope if the story becomes so large (e.g., covering a multi-organization campaign over three years) that it is impossible to include the details necessary for an insightful and plausible story on how or why things happened as they did. In such situations, a facilitator can ask the interviewee to focus on a subset of events or actors or consider returning for a second or third interview.

3. Setting the timeline

Together with the interviewee, the facilitator decides upon the starting point of the story (time and place) and invites the interviewee to start from that moment. To help make this happen, the facilitator can ask questions such as: What was for you an important starting point in time for this story? When do you think this story should start? How did this begin? The facilitator will then locate the interviewee at that starting point by asking them detailed questions about that situation.

4. Safety

Stories contain many rich details. These same details may make it possible to identify people which at times may put people and/or programs at risk. Being safe means deciding in advance, during and also afterward what sorts of details may be dangerous to include and how to mitigate those risks. The first step in managing safety takes place once the scope and starting point are set but before the interviewee shares their story. At this point, the facilitator must ask 'might this story contain any details that put anybody or anything you care about at risk?' With that answer in mind, the facilitator and interviewee will collaboratively decide what to do. For more information, see Chapter 5.

STEP 3:
CONDUCTING NARRATIVE INTERVIEWS

Once the story is roughly framed, the interviewee will know what goes into his/her story, and the narrative interview can get started. Asking many further questions during the storytelling will not be necessary after that and can even be counterproductive, as it can shift attention towards what the facilitator is asking and distract the interviewee from building their story from their perspective as it happened.

There are five further tasks for the facilitator:

1. Helping to build the story

The main task of the facilitator is to encourage the interviewee to tell the story step-by-step, to stay in the moment, and to speak from their position, as it unfolds over time.

A story is an account of events over time in specific places, brought together into a coherent whole, conveying certain messages from the standpoint of the interviewee. A Narrative Assessment story is built from the following elements:

1. It contains an element of **transformation** (something important changed).
2. It presents this transformation as a movement **over time.**
3. It contains **actions** by which this transformation happens.
4. **Characters** (one of whom is the interviewee) carry it out.
5. These actions take place in specific well-described **settings.**

These five elements are brought together in a **plot** (possibly involving crises and turning points). This plot has a point: a key **message** to take away from the story.

It is important not to treat these elements as sequential steps. They are interlocking elements that combine like the ingredients to bake a cake. With the preparation done, once the normal reporting mode is left behind, telling the story will often come naturally to the interviewee. The facilitator can help, when necessary, to bring out the specific elements more sharply, by asking questions like: So, what happened next? Who did that, can you tell me a bit more? What kind of event was that, where that happened? So why does this matter for your story?

The facilitator may also help the interviewee to explore what should go into the story, during the telling. An interviewee may very well move in different directions for some time, exploring different developments to see if they fit into the story. While supporting such explorations, the facilitator may help the interviewee to assess what should go into the story by asking questions such as: So how does this (actor, event, etc.) matter for the story for you? Or: Why do you think this is actually part of this story? Or is this another important story? It may happen that the story the interviewee tells consists, in the end, of a set of smaller interlinked stories that, when woven together, make the bigger story. That is not a problem for Narrative Assessment, but the facilitator and interviewee should develop a shared understanding of what the different smaller stories are and how they are related.

2. Helping to make the story plausible

A very important task of the Narrative Assessment facilitator is to help make the story plausible. The facilitator needs to pay attention to the following three aspects of the story and ask questions where necessary to strengthen the story[4]:

1. Detail: Detail makes stories insightful and plausible. Narrative Assessments ask for detail beyond conventional reporting. An important role for the facilitators is to ask for detail along the way, asking questions such as: Can you be a bit more precise about how that happened? How did you manage to get that invitation? What makes

you think the minister took you more seriously at the meeting than before? Asking questions on this will often be necessary since interviewees will otherwise keep their stories at a general level.

2. Context: Stories that clearly place practice in context are easier to interpret and they are more plausible as they are embedded in a reality. This helps to understand why things unfolded as they did and if and how those circumstances match those of the reader. Facilitators need to encourage interviewees to put their story in its context, asking questions such as: 'So why was it evident to you that the government would respond in this way?' or 'Why did the strategy you chose fit the situation in that province?' Interviewees often take their context for granted so asking questions will often be necessary. How much and what parts of that context matter change depending on the audience (e.g., sharing with peers in other countries or donors). Key elements of that context will have to be included.

3. Consistency: Stories are more plausible when they are internally consistent and when they are also consistent with what we know about the context from other sources. Facilitators will be more effective if they can tell if the story fits the context as they are hearing it. This will give facilitators grounds to ask detailed questions. Facilitators must test consistency so they should prepare for the Narrative Assessment interview by reading up or having informal conversations with informed people on the theme and its context before the interview(s) start.

It may be helpful to ask critical questions to explore consistency gaps and questionable silences or claims and so tease out details to strengthen the plausibility of the story. These gaps and silences may cover events that are in some way challenging and/or difficult, which makes them particularly important to capture. Examples of questions are: 'What do you think made this work there, at that moment?', 'What happened that made you think it was your organization that made the key difference since we know other CSOs also tried to influence this ministry?'.

3. Reflecting and refining

It is likely that after the interviewee has completed the first telling of their story, the facilitator still has questions about inconsistencies, context, silences, or missing detail (gaps in the story). The facilitator needs to reflect constantly during the unfolding of the story and see if any such questions arise and ask them at a time when they will not overly steer the interviewee, possibly after the first telling thereby strengthening the story where necessary by asking things like: 'Can we go back to the moment when...'. Asking questions about a story will likely trigger further memories. At this stage, there is a good opportunity to delve into those as well. It will be clearer what the important elements of the story are and what aspects of these might need further attention. Also, the interviewee may not have shared something considered not of importance and may rethink that, triggered by the questions.

At this stage, looking back or reflecting, it is also appropriate to ask the interviewee to identify which parts of the story or stories they have shared link to the main message and how they do so. This exercise provides the chance to ask: 'Are there other things you have not mentioned that matter?'. It also ensures that the facilitator and the interviewee have a shared understanding of the message and how it is rooted in the plot (the interconnected developments the story tells about). The facilitator may ask the interviewee, giving the interviewee space to reflect. The facilitator can also help construct it (finding the right language, looking back together).

There may be different elements to this main message (for example: how we learned to work with Twitter; how we did this working with a social movement; how this helped to get the minister to finally address our issue). This main message and its different elements will be used to give the story tags, for later retrieval.[5]

4. Completing and closing

After completing the above, the facilitator must also ask the interview if anything came up during their discussion that they think is sensitive. If they do identify something as sensitive, the facilitator and the interviewee must decide on how this information should be handled. For more information, see Chapter 5 on safety.

Finally, the facilitator should share with the interviewee what will happen next. This may, for example, be returning the cleaned-up transcript to the interviewee and scheduling a meeting or planning to interact over email to make sure the story reflects the telling and perspective of the interviewee.

5. Recording

To capture stories in all their richness, it is important to record and transcribe the interview in the original language. Given that the quality of a Narrative Assessment depends on details, and that the relevance of these details may not be apparent until later, it is not possible to trust the memory of an interviewer unless they are very well trained in note-taking.

STEP 4:
DISTILLING STORIES FROM THE NARRATIVE INTERVIEWS

Interview transcriptions or notes easily run into 10 to 20 pages. Those writing up a story will need to transform the interview transcripts or notes into a story that is meaningful and to-the-point for busy staff and other audiences to read. While the stories need to be easy enough to understand and engaging, they must do justice to the story as told by the interviewee. This requires condensing the story while retaining key developments and important aspects of the context. It also involves putting the interviewee at the heart of the story as the protagonist whose knowledge and experience are presented throughout the story. At the same time, the story also needs to bring out critical detail and consistency.

Stories can develop from a single interview, to share one advocates' experience. It is also possible to develop stories about programs, implemented by several organizations or individuals, or larger events incorporating and connecting stories told by different advocates. These are different types of stories, requiring different forms of reworking. Below, we first address the story from the single interview; we then go into the more complex task of developing stories from multiple interviews.

1. The single-interview story

During a narrative interview, an interviewee is not telling a ready-made story; they are constructing the story, reflecting, remembering, and adding on the spot. There may be main points and minor points, repetitions, and side stories. These things are what often make for a long transcript telling much more than the main story. However, based on the preparatory exploration beforehand and the way the story is told and concluded, the facilitator will be able to distil at least the main story from the interview, identifying and bringing out:

- the main set of interconnected events forming a **plot;**
- and how the telling of the events conveys a main **message;**
- connecting **characters** with **action;**
- over **time;**
- in **settings** that are described so they can be clearly recognized and are demonstrably relevant to the message.

A single interview can usually be boiled down to a 2-3-page story. Sometimes, one interview ends up containing more than one story; and from one transcript, more than one can be distilled. To stay as close as possible to the interviewee's form of the story, it is advisable to maintain the wordings, the style of narrating, and the first-person perspective of the interviewees as much as possible. Stories are written from the perspective of the interviewee. To get the feel right and stay in the perspective of the interviewee, it is helpful to listen to key bits of the interview before and while writing the story. Cleaning up grammar, hesitations and the like is advisable though, as it will raise the clarity and quality of the story, making it a more compelling read.

To make a story interpretable for different intended audiences, the facilitator may add information. This may be necessary since the original audience (the facilitator) is not the intended audience. The interviewee may have told their story rightfully assuming that the facilitator has insider knowledge on, for example, the setting, actors, or events. The facilitator needs to consider what information, for example, about the setting of the story, should be added to the story for an intended audience and then ask the interviewee to check the draft to see whether the adjusted rendering still does justice to their perspective.

Sensitive information may need to be adapted, in particular when the story is meant for external audiences (more on that in Chapter 5 on safety).

After drafting the story, the facilitator must send it to the interviewee for checking, giving them the opportunity to correct the draft. In this exchange, the facilitator must tell what they have added or changed in the story and why those decisions were made.

Sometimes, a story that an interview tells consists of a few interconnected smaller stories. For example: 'How I built a relation at a ministry'; 'How an opportunity to influence a policy developed at that ministry because of a political development'. In such cases, we speak of a 'composite story'. Those will be more common still with stories built from more than one interview. At times, these smaller stories can be separated, while for other purposes, they are better kept as one story.

2. The multiple-interview story

Many advocacy trajectories involve several organizations working in alliances, multiple events over a longer period, and more than one advocate. Stories from different interviewees can be put together in a single story. As this is more complicated, the multiple-interview story is more challenging for facilitators than the single-interview story and may require some additional support from the trainers.

When advocates have worked together very closely, there may be a single composite story to tell by combining different interviews into one, with one plot that the interviewees all agree on. In that case, the process of building the story may be similar to that of a single-interview story, be it that you include different advocates' voices into it. In that case, the facilitator may need not write the story in the first (I) person but, rather, to take up the role of a narrator, telling the story but 'existing outside of it' (telling what happened and what advocates did, etc. in the third person, (he/she/they). In some cases, the narrator will also have to at least partly formulate the plot and main message (and thus also the rest of the story), bringing together different voices into one story (which may shed a different light on the same sequence of events).

For example, a facilitator has conducted a set of narrative interviews with advocates from four different organizations, about a campaign over several years in which each played a role. This set of interviews will have to be reconstructed into one single story that ties these together. The question is how to do this without imposing an interpretation that does injustice to the interviewees. Based on the different interviews, the facilitator can decide that the interviews each show a different part of the campaign (from a similar perspective or a different view on it). A challenge is how to define the main message. It can still be possible to do this while drawing on the interviews, as they together may provide input for this based on their similarity. For they all engage the same difficult context and all contribute to the same result, offering part of a sequence of events that contributed to a certain outcome.

The facilitator can introduce that starting point at the beginning of the story and then proceed including the different voices of the interviews in a single story. Within these parts, the principle remains the same of maintaining the voice of the interviewee as much as possible, with main elements (events forming a plot with a message, characters, action, and setting) distilled from the interview as with the single-interview story. The narrative will have to create text elements connecting those voices, and also a concluding part confirming the main message, and reflecting on the different elements.

A multi-interview story will be longer than the single-interview story. It's important to decide upon an acceptable length for your audience and adjust the story accordingly. If the case under study is complex, with many story strands, facilitator(s) may also decide to create several stories from the same set of interviews.

An example applying this approach for a Cordaid program can be found here, also in French, in which the authors of this manual worked with this approach.[6]

Here too, to make the story understandable for different intended audiences, the facilitator may add an introduction, some information, for example on the setting, to help these audiences understand the story. This may be necessary since the original audience (the facilitator) is not the intended audience.

Again, sensitive information may need to be adapted, in particular when the story is meant for external audiences (more on that in the section below on safety).

After drafting the story, the facilitator sends it to the interviewees for checking, giving them the opportunity to correct the draft. In case of variety in perspective, the facilitator might want to address this in a meeting with all interviewees where possible. If no agreement is found, it can be decided to resolve this by focusing the stories on agreed elements, with further reflection on plausibility as a key factor deciding what should go in. If different accounts continue to be plausible also after this reflection, stories can highlight the different experiences as partial and/or reflecting different angles.

04 STORY USAGE

Narrative Assessment builds collections of stories for a purpose. The purpose defines the focus of the stories, but also the usage. A set of stories can be brought in for enriching periodic reflection, learning, and planning, for reporting, and for communication with diverse stakeholders

ENRICHING COLLECTIVE REFLECTION, LEARNING, AND PLANNING

Narrative Assessment stories can be used to support collective reflection, sense-making, and learning. Through these activities, Narrative Assessment can also support decision-making.

Stories can be shared and discussed during workshops to support:

- reflection regarding interventions, the handling of challenges, and acting on windows of opportunity;
- Reflection on evidence of successes or failures and their implications;
- Dialogue on the way forward, e.g., by refining a Theory of Change based on the assessment of the effectiveness of strategies.

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Example: Reflection and planning meeting *Green and Inclusive Energy* program Hivos

Introduction

The *Green and Inclusive Energy* program was part of a wider initiative implemented by consortium of Hivos, IIED, and Article 19. The program advocated a transformation towards inclusive decentralized renewable energy systems. It worked in three different levels: country-level (Indonesia, Zimbabwe, Malawi, Kenya, Tanzania and Nicaragua - later replaced by Guatemala), regional (Central America), and global level. For its program management, the program used Outcome Harvesting and Theory of Change thinking[7]. Small teams including an advocacy officer work with partners in the countries, guided by a joint theory of change. The reflection and planning meeting followed a first cycle of Outcome Harvesting (elaboration of outcome statements, substantiation, and analysis).

Step 1. Narrative interviews

To prepare for the annual reflection and planning meeting of the Green and Inclusive Energy program, narrative interviews with all advocacy officers were held on the outcomes to which they contributed. Each advocacy officer selected one or more outcome statements for the interview. An interview guide was elaborated to provide some focus for the Narrative Assessment facilitators.

There were two major interview topics: advocacy dynamics to unpack the relations between the outcome achieved and the influencing factors; and exploring what went into the actions in terms of, among others, decision-making and underlying assumptions. Where appropriate, attention was directed to partnership and collaboration issues.

Step 2 Narrative Assessment stories

From the verified transcripts, emerging common themes were identified by the Narrative Assessment facilitators and agreed with the program manager, who in this case is the 'owner' of the annual reflection and planning meeting, and with the meeting committee. Around each theme, stories were then carved out from the transcripts, with some interviews contributing to several themes. This resulted in the editing of 11 stories of 1/2 to 1.5 page organized in four theme clusters: working with government, inclusiveness in advocacy, working with partners, and innovative advocacy approaches. Each story contained the six story elements mentioned earlier: transformation, a movement over time, actions by which this transformation happens, a specific setting, a plot (often involving crises and turning points), and a takeaway message. A theme cluster often covered stories from more than one country or level.

Step 3 The reflection workshop design

With the stories as a basis, a workshop was designed together with the meeting committee. The workshop participants consisted of staff from partners and the program with different roles and included those with whom a narrative interview was held. It was decided to organize sharing, reflection, and sense-making in four groups around the theme clusters. Theme clusters were each moderated by a facilitator, including the Narrative Assessment facilitators, to help focus on:

- Connecting the stories and bringing out commonalities;
- Sense-making of what emerges.

Before the start of the workshop, participants received all outcome statements and all 11 stories, so they were aware of the achievements of the program and had an equal information base.

Step 4 The reflection workshop
Each group worked with their cluster stories around reflection questions such as:
• What resonates with your own work and thinking?
• What do these stories tell us about our strategies?

The facilitator helped the group to reach deeper levels of reflection by linking, comparing, or contrasting issues emerging from stories, and by highlighting strands or threads. In this way, the group could jointly make sense of what was revealed and capture the emerging insights.

There were two rounds of group work so each participant could discuss two theme clusters. The insights from the group work were then shared in a plenary for collective reflection on what convergence and agreements emerged across the stories and themes. The workshop participants then looked at the theory of change to locate the collective agreements on aspects such as interventions, challenges, assumptions, outcome areas.

Evaluation of the use of Narrative Assessment stories in the reflection workshop
For a reflection meeting, the Narrative Assessment stories proved to be of added value as advocates felt that the stories helped to create the right perspective: they could understand not just the end result, but also the context around it, and appreciate the challenges confronted. They felt that the unpacking of advocacy dynamics enabled them to finally explain what they are doing and show a human face to their work. They stated that these Narrative Assessment stories 'are our own stories, not stories that we are used to telling donors'. The stories made their work more understandable to each other. Showing how advocates dealt with failure and challenges, jumped on opportunities, strategized and went through lows and highs did not only increase real and realistic learning, but also mutual empathy and the insight in their own work as part of a collective endeavor.

Those who were involved in an interview felt that this was really useful, as it forced them to take the time to reflect. The critical questions that were asked helped to generate a good process of reflection.

While one story already allowed to draw many conclusions, bringing together many stories from across the program was reported to make the reflection even more interesting and useful for learning —including from what did not work— and to stimulate new ideas. Common themes emerged from the many stories, for example about leadership, and about being flexible and adaptive as an advocate. Having the stories from across the program also created a feeling of partnership; a sense that one is not alone pushing the cart.

The reflection meeting brought many insights with implications for the program's theory of change in the countries. The next step for the advocates and their teams will be to adjust their strategies and Theory of Change based on the insights.

MID-TERM AND FINAL EVALUATION

Authors and readers of reports about programs often have related complaints. Reporting can be a time-consuming chore. Reading and processing reports can be unrewarding as the commonly found tables and narrations are hard to make sense of and poorly convey the meaning of what has been done, achieved, or not achieved. Narrative Assessment offers a way to make reporting and evaluation broader, more meaningful. Stories and insights from across stories can be integrated into reports to convey the nature of the work being done, as well as the nature and significance of successes and challenges.

Narrative Assessment offers a way to make reporting more meaningful. Stories and insights emerging from collective reflection on stories can be integrated into reports to convey the nature of the work being done, as well as the significance of achievements and programs. They can, for example:

1. Provide a robust, plausible explanation of how outcomes have been achieved.

2. Situate outcomes in challenging contexts, facilitating the proper interpretation of programs and their achievements.

3. Do justice to contextually relevant knowledge and capacities.

4. Situate the work in a longer-term process, offering rationales for supporting future action.

Mid-term reports can also include a section exploring ways forward for staff, program partners, and donors, who would read it with the insight in the capacities, challenges and opportunities of the program gained from the earlier report sections.

For end-of-project reporting, this applies as well. In addition, the stories and insights can offer a sense of advocacy as a (challenging) journey. Advocacy achievements are often small intermediate steps that get their real meaning only in the light of a larger future picture that can be sketched through the stories, providing a sense of the significance of future support — depending on the plausibility of stories and the insights drawn from them.

Example: Mid-term review of *Sustainable Diets for All* program of Hivos

Introduction

The *Sustainable Diets for All* program was part of a wider initiative implemented by a consortium of Hivos, IIED and Article 19. The program advocated a transformation towards sustainable food systems. It worked in four countries distributed over four regions (Indonesia, Zambia, Uganda and Bolivia) and at the international level. Similar to the Green and Inclusive Energy program, it used Outcome Harvesting and Theory of Change thinking.[8] A small team including an advocacy officer worked with partners in each country, guided by a joint Theory of Change. The mid-term review meeting followed a second cycle of Outcome Harvesting.

Step 1

In preparation for the mid-term review, the SD4All program manager suggested holding Narrative Assessment interviews with all five advocacy officers. After a first interview, in conversation with the program manager, the Narrative Assessment facilitators decided to focus the interviews not on particular outcomes, but rather on how to start an advocacy program. Six interviews were held via meeting software, including one with the program manager and one with two persons. At this writing, a seventh interview with staff from the consortium partner IIED will be held in a few weeks. An interview with a partner organization did not go through because of connectivity problems.

Step 2
From the verified transcripts, six stories were created around emerging themes identified by the Narrative Assessment facilitators. All themes related to the evolving program. In this case, the stories were between one-and-half and five pages. Again, each story contained the six story elements mentioned earlier: transformation, a movement over time, actions by which this transformation happens, in a specific setting, a plot (often involving crises and turning points), and one or more takeaway messages.

Step 3
As the meeting was part of a mid-term review, some instruments from Theory U[9] were used that can support deeper reflection, such as levels of listening and dialogue walks. The team worked in two groups on the following questions:

- What do the stories tell about your own journey and the journey of the SD4All program?
- What do the stories tell you about how important challenges and opportunities for SD4all have been taken on?
- What do the stories tell you about the best possible ways forward for SD4all
  - at the level of your country or region?
  - at international level?
- With the stories in mind, think with your heart and mind about what SD4all should try to achieve in the coming 2.5 years.
- Based on the stories and the discussion so far, can you come up with one to three concrete ideas for SD4all to take up, that can be made operational this week?

In plenary, the team then discussed the following:
- What opportunities do you see emerging and where?
- Where and on what should SD4All therefore put more weight?
- How can we translate our views so far into concrete actions: during this week, and in the coming two years?

This session then led into one on the consequences for the SD4All overall, country theories of change, and priorities for the year and the remaining project period.

Evaluation of the Narrative Assessment process and experience
As the program works with consortium partners, these required more information on the context of the new approach. SD4All was a new program on an ambitious topic. The Narrative Assessment stories helped to unearth insights into the struggle to start such a program, to show the strategies and reasoning used, and recognize the complexities of starting a new program with a heritage from the past. Interviewees remarked how they changed from thinking that the interview was a test, to coming into a reflective and learning mood through the facilitated interview. They said that the interviews helped them to remember what was already forgotten in the rush of the day. However, not all interviewees found it easy to transmit the peculiarities of their context despite their understanding its importance. As this was a first pilot it took quite some time, whereas a regular use of the approach could make it more agile.

For all participants, the process itself was as important as what it produced. It was recommended to extend this approach to the partner organizations as well, and to organize a training of Narrative Assessment **facilitators.**

COMMUNICATION

The stories developed and assessed through Narrative Assessment can form a firm and appealing basis for communication to diverse internal and external audiences.

The stories developed and assessed through Narrative Assessment can form an appealing basis for communication to diverse audiences. They can, for example:

1. Show ways of working that are representative for a program
2. Highlight key achievements
3. Recognize diverse organizations' capacities
4. Amplify different voices
5. Facilitate connection with and between advocates
6. Offer insight into advocacy as a challenging journey
7. In the light of a larger future picture, provide a sense of the significance of ongoing and future support
8. Recognize the capacities of individuals and organizations

By communication, an organization accounts for past actions, while also appealing to support further actions. Story-based communication is highly suitable for relating to the future as much as to the past. Moving over time, a story is a proposition of the meaning of past actions, that also shapes how things are seen and what is done in the future. It can also be a proposition to come along on a next stage of a journey. To offer such a proposition, stories need to present an engaging view of a plausibly successful way forward.

By revealing the advocacy dynamics and relating them to outcomes achieved, Narrative Assessment stories can offer credible interpretation of how a change is a step in the right direction, and how that may help set the stage for further desired change. That credibility and the plausibility of the stories and derived public documents are robust as the advocates' knowledge, ability and insights are embedded in stories co-created through critical inquiry and rigorous analysis.

Where Narrative Assessment stories do not report actual or expected future success, they can show how ineffectiveness or failure came about and could be overcome. The stories can make understandable how an unwelcome and unexpected turn of events, struggles among the advocates themselves to get a hold on complex issues, or other factors have influenced the advocacy work and results. The insights from such stories help advocates to explain their case internally.

The journey that organizations and programs are undertaking with their advocacy is shared with partners, communities, donors and the wider public using Narrative Assessment stories. These stories can also offer legitimation and justification for continued support and further investment. This is important given the public and political debate regarding the effectiveness of development interventions. The Narrative Assessment stories not only satisfy the need of media and supporters for narratives and case studies to give context to the numbers and statistics. Crucially, communication based on Narrative Assessment stories can strengthen arguments for continued investment while at the same time contributing to a realistic understanding and acceptance of advocacy outcomes for what they are: steps on an often long and windy journey.

Stories can be presented in diverse ways, for example, in written form on programs' or organizations' websites, as videos, as blogs shared through social media, or in the form of (online) collections, such as the one here, developed with Cordaid, also available in French[10]

STORIES FOR DIFFERENT AUDIENCES

Stories for different audiences are to be written differently, although they may originate from the same interview. Below are some main considerations that can inform the adaptation of stories to different audiences:

Purpose: Stories for in-team learning do not have to hold much contextual knowledge, regarding, for example, the country or issue. Stories that are to convince a donor or are used for peer-to-peer learning across countries or regions might be strengthened with that same knowledge.

Safety: Stories that convey sensitive information are best kept internal or adapted for external usage.

Strategy: Stories that convey knowledge about important contacts or strategic knowledge are best kept internal.

Context: The context where something has happened and the context where that story will be read will differ. To translate between contexts, the story must contain information that permits the audience to understand how things function. For example, an interviewee may state that they went to their cousin who works in the ministry. This familial relationship may not be relevant in the same way in the context of the reader. To improve quality, then, the story needs to show how the familial relation matters. To insert this knowledge into the story, the facilitator ideally has the contextual knowledge while also being aware it is in fact contextual knowledge. To help identify key elements of context for outside audiences in case of doubt, the facilitator can review draft stories with a member of the intended outside

audiences to see what needs to be clarified. In case the facilitator is from outside of the context, they need to ask the interviewee during the interviews any time that a turn of events or strategizing or role of context is unclear to them. Aware of the content that needs to be added, the facilitator can finalize the story in a way that makes sense to readers who are in different contexts.

LANGUAGE

A story is supposed to be an account of things that matter to the storyteller. Part of the way people experience things is shaped by language. Language is not neutral. Different languages influence what we see, all translations are partial (they are incomplete and they shift meaning) and nobody is perfectly multilingual. We're all better in some languages than we are in others. This means that if we want to tell a story as we experienced it, we best tell the story in the language in which we experienced it. If that is not possible, the story should at least be told in a language the interviewee is comfortable with. This implies that the facilitator should also be comfortable with that language. In addition, stories drafted from interviews should be in that language, so that the interviewee can check whether the rendering matches their perspective and telling. After such checking, stories can be translated into other languages for usage.

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05 OWNERSHIP AND SAFETY

INTRODUCTION

The stories told in Narrative Assessment are owned by the interviewee as the teller of the story. They are highly personal, sharing perspectives and accounts of events as they unfolded in advocates' working lives. It is the interviewee who is to decide how much is told and with whom. Since sharing is the main purpose of Narrative Assessment, the stories must be safe enough for interviewees to allow for sharing.

Narrative Assessment asks for a wealth of details and some of these may make it quite easy to identify precisely who did what where, why, and with what effects. This information may be useful to those who oppose the goals of advocates and programs. For example, if an advocate successfully uses a family network to build trust with a senior official, and if this senior official acts in the way the advocate suggested, public recognition that this official's actions were influenced could put the advocate, the official, and the programmatic gains at risk. Further, circumstances may change over time so stories that were once safe later become dangerous. These changes are likely not to be detected by outsiders. As such, those who share stories must know that they own them. This means they have the right at any time, to have their contribution modified or removed.

Box 2. A three-legged stool

Evaluation often seeks to establish relationships between outcomes, mechanisms (how the outcomes were achieved), and context. Outcomes assessment is, predictably, interested in outcomes. The standard of validity for outcomes assessment is transparency: it should be possible to confirm precisely what is reported. Narrative Assessment focuses on the other two parts of this three-legged stool, namely, mechanisms and context. These two other parts are often used for a different purpose: improving practice. By gathering stories, Narrative Assessment builds a rich understanding of how mechanisms contribute to outcomes and the role of the context in this.

An insightful, plausible story showing how or why things happened as they did does not require full transparency. In those cases where full transparency is considered necessary, it is possible to gather information that helps others in a manner that does not specifically describe actual practice or an actual context, in a way that can make people or actions involved identifiable. This section describes a few strategies that can be used to improve the ability of people to report useful information, preserve the integrity of the data gathered, and protect the people and programs that have shared their stories.

SAFE GATHERING AND REPORTING

Facilitators should not ask for or hold information that could be used to harm. If it is not possible to talk about things as they actually happened, then the facilitator and interviewee, before starting to record their session, may agree on a strategy that the interviewee will use to hide those parts that create risks. The simplest way to hide the origin of a story is to **change details** like the names of the organizations involved, dates, and locations in the story in ways that blur the connection to specific events, actions, or relations. This can also be discussed at the closing stage of the interview or afterward.

If this blurring is not sufficient, an alternative approach is for the facilitator to ask the interviewee to present their **narrative in the third person** ('I have a friend who...'), to **depersonalize the account** by explaining how somebody in a situation like theirs might respond, or to change details in the story that are not relevant to the lessons learned.

While this may sound as going against the transparency and verification purposes of sound evaluation, it may make sense for advocacy and thus Narrative Assessment, since an important purpose of Narrative Assessment is to understand how things happen in advocacy. It is possible to tell a valid and useful story using a fictional setting. The decision to fictionalize parts of a narrative must be taken consultatively as they must both protect and communicate. While the person asking for permission to do so need not reveal the details, they must provide a strong justification. Incidentally, this sort of fictionalizing need not alter the nature and level of detail present in a narrative.

But what about context then? An accurate description of the exact context in terms of people, places, and exact events may not be crucial for building understanding (of, for example, why an unusual strategy succeeded). What matters is ensuring that the details provided support accurate interpretation. It is possible, and sometimes necessary, to modify details about context in stories and have distant readers still make correct interpretations. This means that heavily modified stories can support valid assessments.

To make it possible for a team to validate or more deeply address the story, the facilitator, with permission of interviewees, may choose to create a document stating the modifications, and store this securely.

CATEGORIZATION, STORAGE, AND RETRIEVAL

To be able to use stories for various purposes, it is important to gather and store them, and to do that in ways allowing for access and retrieval of different types of stories (e.g., stories about outcomes, stories about a certain part of the program, or certain types of challenges). This is particularly helpful in cases where large numbers of stories are produced, as with evaluations involving multiple organizations or several countries.

Categorization

Stories will be structured around themes. These themes, which will be informed by program interests, will become thematic tags. In addition to these thematic tags, interviewees will answer the question 'what is most important in the story you just shared?'. This will create a list of 'key points' tags. Each narrative will also be classified according to a standard set of variables like location, program, date, the identity of the interviewer, and any other non-thematic variable that is relevant. All three kinds of tags will be put as keywords at the top of the story.

Storage and retrieval

Recordings of interviews, original language transcripts, and all working documents (including an 'info' file that contains all relevant information about the story) can be stored in a folder accessible only to the team directly involved in that Narrative Assessment. This folder is to be categorized as confidential.

The stories produced from interviews, edited for safety and confidentiality, can be stored both in the original language and in English.

Once the stories, both in original language and in English, have been checked to ensure they do not create risks or violate legal requirements regarding personal data, they can be placed in a folder within the 'Narrative Assessment stories' folder that is accessible to others involved, for example, staff of other organizations involved with the same program. All these stories the consortium must be safe for public access.

To facilitate retrieval, the location of each story, tags, and contact information can be entered in an Excel sheet stored in the 'Narrative Assessment stories' folder. Management can decide whether to keep or destroy confidential records at the end of the project.ppendix. Theoretical foundations

FOOTNOTES

1 Argyris, C., & Schon, D. (1978). Organizational learning: *A theory of action approach*. Reading, MA: Addison Wesley.

2 See Loh J. (2013). Inquiry into issues of trustworthiness and quality in narrative studies: A perspective. *The Qualitative Report* 18(33), 1-15.

3 Polletta F., Chen P.C.B., Gardner B.G. et al. (2011). The sociology of storytelling. *Annual Review of Sociology* 37: 109–130; Roe E .1994) *Narrative Policy Analysis: Theory and Practice.* Durham and London: Duke University Press; Wagenaar H. (2014). *Meaning in Action: Interpretation and Dialogue in Policy Analysis*. London: Routledge; G. Monbiot (2017). It's time to tell a new story, The Guardian 9-9.

4 This section draws on Loh J. (2013). Inquiry into issues of trustworthiness and quality in narrative studies: A perspective. The *Qualitative Report 18*(33), 1-15.

5 Tagging of stories is discussed in Chapter 5.

6 Van Wessel, M. G. J., Ho, W. W. S., Marty, E., & Tamas, P. A. (2021). *Advocacy in context: Stories from South Sudan, Nigeria, Burundi, Central African Republic and Afghanistan.* The Hague: Cordaid; van Wessel, M. G. J., Ho, W. W. S., Marty, E., & Tamas, P. A. (2021). Available at: https://edepot.wur.nl/543871; Van Wessel, M. G. J., Ho, W. W. S., Marty, E., & Tamas, P. A. (2021). *Le plaidoyer dans le contexte: Histoires du Soudan du Sud, du Nigeria, du Burundi, de la Republique centrafricaine et de l'Afghanistan.* Cordaid.Available at: https://edepot.wur.nl/543872.

7 http://www.theoryofchange.nl/sites/default/files/resource/hivos_toc_guidelines_final_nov_2015.pdf

8 Ibid.

9 Scharmer, C. O. (2007). *Theory U: Leading from the Future as it Emerges.* Cambridge, USA: The Society for Organizational Learning.

10 Van Wessel, M. G. J., Ho, W. W. S., Marty, E., & Tamas, P. A. (2021). *Advocacy in context: Stories from South Sudan, Nigeria, Burundi, Central African Republic and Afghanistan.* The Hague: Cordaid; van Wessel, M. G. J., Ho, W. W. S., Marty, E., & Tamas, P. A. (2021). Available at: https://edepot.wur.nl/543871; Van Wessel, M. G. J., Ho, W. W. S., Marty, E., & Tamas, P. A. (2021). *Le plaidoyer dans le contexte: Histoires du Soudan du Sud, du Nigeria, du Burundi, de la Republique centrafricaine et de l'Afghanistan.* Cordaid. Available at: https://edepot.wur.nl/543872.

APPENDIX THEORETICAL FOUNDATIONS

WHY NARRATIVE ASSESSMENT?

Many organizations use advocacy to work towards a better society. Monitoring and evaluation aim to create knowledge about advocacy and its effectiveness. This is necessary to be able to plan, learn and adjust course. In many cases, it is also necessary to communicate about advocacy and be accountable to, for example, institutions and citizens supporting an organization's advocacy.

However, monitoring, evaluating, and learning are notoriously difficult when it comes to advocacy. Causal relations between actions and results are hard to establish. Influencing often takes place behind closed doors and it can be risky to talk openly about it. Those targeted by advocacy often may not be ready or available to discuss being influenced or not by specific actors, actions, or events. Intervention effects can be expected to be one among numerous other causal strands, making it hard to determine or claim their contribution. In addition, the targets of advocacy —policymakers, publics, private sector actors— are moving targets, continually subject to various influences. Moreover, as change processes often play out simultaneously at different levels, and involve multiple actors, actions, and events, it may be difficult to identify evidence and interpret the contribution of outcomes to desired changes.

In addition, to advocate effectively, advocates need to navigate unpredictable and unknowable dynamics. These dynamics may provide opportunities for advocates or throw up sudden barriers that limit opportunities to attain desired changes, notwithstanding best efforts and capabilities. It also means that advocates often have to adapt to changes in the contexts where they work.

In practice and research, much of the difficulty of assessing advocacy results from the complexity of the change processes in which advocacy is involved.[1]

In line with this, there is no generally agreed view on 'what works when' in advocacy. There are some shared understandings on how to act effectively. For example, there is the notion of working based on an analysis of political context, of working within windows of opportunities; of engaging with policymakers' needs and understandings rather than just having confrontational approaches; of providing credible evidence and usable ideas; and of forming coalitions. However, none of these are sufficient for success.

Consequently, strategizing by advocates often is not based on sure-fire knowledge of cause and effect, but on practice-based and contextualized judgment on possibilities for change and which strategy could effectively influence specific targets in a given context and at a certain moment. Therefore, much knowledge about the unfolding of advocacy work in relation to a change process is tacit in nature: it exists and develops in advocates' minds and in interactions between advocates and with other stakeholders.

Narrative Assessment is not a new concept. The term 'Narrative Assessment' is also used in other domains, to refer to varied forms of qualitative assessment. For example, in special education, educators make 'Narrative Assessments' of students' progress that cannot be measured conventionally, through standardized testing. While our context is very different, the rationale for our form of Narrative Assessment is related: current monitoring and evaluation (M&E) methods primarily focus on results, but do not address the often-complex relations between results and efforts.

HOW STORIES CAN HELP

A story is an account of events over time, brought together into a coherent whole, conveying certain meanings from the standpoint of the narrator. Stories are interpretations of human action in practical, concrete situations. They simultaneously function as explanation, justification, and instruction. A plausible story creates order and sense in a shifting, unpredictable and opaque environment. By making past actions understandable in this way, the stories create the conditions for further action.

Stories are uniquely useful for reflecting on and assessing advocacy. By building stories, advocates can take along others on their journey, as key characters in a story that unfolds over time. Stories can cover all situations that advocates face, make sense of and navigate. Stories allow them to share their knowledge of the situation, of other story characters, the context involved, and of the transformation of which they were part and in which they had a role to play. These stories can be greatly varied. They can be about relations built over time, and how they made a difference. They may be about just one window of opportunity and how it was swiftly acted upon with great results. They can tell about the ways constricted political space for action hampered a programme unexpectedly, or about the ways powerful adversaries acted against a programme's objectives, and how this was responded to. Importantly, in Narrative Assessment stories, disappointments and failures are not negatives one would rather hide; they form meaningful parts of the stories.

Furthermore, stories are useful for assessing advocacy because advocacy often seeks to advance change in situations that, from the programme's perspective, are an affront to moral principles of some sort (e.g., the right to clean water, to land, justice, basic human rights, or protection from violence). In addition, advocates appeal to a shared moral standpoint when they call out for support, or make propositions with regard to the worthiness of their efforts or the significance of their success. In such situations of assumed or observed moral affront that demands action, stories can convey the meaning of the work being done.[2]

In addition, stories make available the lived experiences of advocacy staff, providing vibrant, multifaceted, and situational rendering of meaning.[3] By relating a story to the programme's Theory of Change, its meaning can be constituted in terms of what is relevant for wider audiences (colleagues, partners, communities, and donors).

NARRATIVE ASSESSMENT AND OTHER M&E METHODS

A NEW WAY TO BE RIGOROUS

Stories are easily criticized as subjective, and therefore as not meeting requirements for evaluation, which is assumed to be factual and unbiased. Addressing these risks, Narrative Assessment offers a new direction for conceptualizing rigour, drawing on the well-established narrative inquiry research tradition. To clarify how, we first need to clarify the risks attached to stories as a form of information. A story imposes meaning and coherence upon a disorderly and ambiguous reality. A story is an account of what happened, idealizing and cleaning up, attributing causation, highlighting, and lowlighting. Stories, thus, as much create as they describe order. By idealizing and cleaning up, stories provide meaning and direction, also countering the threat of becoming overwhelmed by disorder and indeterminacy.[4] However, idealizing and cleaning up entails certain risks pertaining to credibility. While stories impose meaning and coherence on messy situations, they may do so in ways that glorify the programme, advocate or achievements while presenting images of perfection that are alienating and implausible. To counter these risks, Narrative Assessment includes a critical examination of claims made in stories, to maximally develop the plausibility of stories. Plausibility is determined by the 'verisimilitude' of stories – their quality of being believable. Narrative Assessment stories therefore are co-constructed between the advocate as lead author and the Narrative Assessment facilitator in the role of critical friend. The facilitators are to seek detail, assess consistency of statements, and make sure it is clear how the story is embedded in its context, relating to that more objective reality (e.g., of a certain political context or event).[5] In this way, Narrative Assessment facilitators test the believability of stories against alternative interpretations, undermining gaps, and apparently empty claims. In consequence, Narrative Assessment stories are not just-so stories, but credible monitoring data.

METHODS AND THEIR LIMITS

But why go through the trouble of taking up a new method, when there are many methods already available and in use? This is because Narrative Assessment can address a set of important limitations of other methods.

It is increasingly recognized that conventional M&E methods are not very suited for dealing with complex interventions such as advocacy. For example, experts recognize that causal pathways often cannot be fully known prior to an intervention; that what needs to be measured may not be known prior to an intervention, and that processes shaping a programme and its results are not stable.[6]

Practitioners, scholars, and consultants have increasingly started to take complexity as a starting point for understanding development work itself, as well as its monitoring and evaluation. Several recent publications stress the complexity-related challenges involved with advocacy and its monitoring and evaluation.[7] Recently,

M&E methods have been developed that seek to engage with complexity, including Complexity-responsive Evaluation,[8] Complexity-Aware Monitoring,[9] Developmental Evaluation,[10] Contribution Analysis,[11] Outcome Mapping[12] and Outcome Harvesting.[13] While those M&E approaches have much to offer, they are not specifically geared to advocacy. and have certain limitations when it comes to monitoring and evaluation of advocacy. Current M&E approaches do not address four key issues, discussed below:

- measurement and evidence;
- the meaning of achievements and failures;
- learning;
- communication

MEASUREMENT AND EVIDENCE

Current M&E methods focus on the measurement of achievements, often using indicators to classify these. Outcome indicators used for advocacy are often quantitative in nature, such as 'number of elected officials who publicly support the campaign'. Also, qualitative indicators are employed, including e.g., strengthened organizational capacity, or uptake of certain arguments in political debate. To a degree, such indicators can be used to 'measure' achievements of advocacy programmes. However, rather intangible outcomes such as increased credibility of the organization's positions in the eyes of policymakers, or increased support for a certain policy position among policymakers are hard to measure. At the same time, these are crucial achievements.

In addition, these methods do not critically reflect on the issues of evidence. They easily gloss over the fact that when it comes to advocacy, evidence of outcomes is often not available or accessible, because they are intangible, invisible, or politically sensitive. Some methods that focus on evidence-gathering, (contribution analysis and process tracing being the most prominent ones), are appealing in their sensitivity to complex contexts and processes. At the same time, implementation of such methods, especially when it comes to complex programmes involving many actors (as often found in advocacy for development) is highly resource-intensive, while not able to resolve key mentioned challenges of evidence availability and accessibility that would often be confronted.

THE MEANING OF ACHIEVEMENTS AND FAILURES

While advocacy achievements may be measured in some cases or to some degree, they need to be interpreted to make sense. For example, a number of elected officials publicly supporting a campaign does not tell us whether the campaign has actually changed their viewpoints. Qualitative tools measuring change do exist, including e.g. Most Significant Change, Outcome Harvesting, and Outcome Mapping. However, while such approaches can bring out results in qualitative terms, they still pay little attention to the question of what an outcome means in light of the Theory of Change of a programme, and in the context in which the outcome is achieved. As mentioned earlier: advocacy results are often steps in the direction of impact, rather than results that have a direct impact on constituencies. The nature and significance of an advocacy outcome can therefore often only be interpreted in light of the hypothesized pathways of change and desired outcomes that are described in a Theory of Change. Furthermore, current tools are highly intervention-centred, paying little attention to the context in which a particular intervention is to make a difference and how contextual factors influence and interact with intervention activities. In advocacy, an organization's intervention will be but one factor in a complex process involving many actors and factors. Current tools thereby tend to provide a rather decontextualized presentation of a programme and its results when it comes to advocacy. What a programme's achievements mean in the broader context in which it operates remains hard to say.

LEARNING

By focusing on outcomes first and foremost, existing methods provide little insight into the actual work of advocates. The judgments and analyses behind strategies contributing to achievements and failures remain black-boxed. As a consequence, they cannot support decision-making and strategizing about the next advocacy steps: what went into the mix of efforts, knowledge, relations and skills to achieve outcomes, what dilemmas and challenges came up, and how these were confronted and eventually solved (or not). Existing methods, therefore, offer little opportunity for the identification of lessons to strengthen future advocacy theories, approaches, and strategies.

COMMUNICATION

Existing M&E methods for advocacy are mostly focused on producing reports for internal and external accountability purposes. There are two basic limitations with this, constricting the usefulness of such reports for communication.

Internal communication in organizations and networks

Existing methods do little for internal communication about advocacy work within organizations and networks. Reports that focus on what comes out of the 'black box' of advocacy do not convey the nature and significance of advocacy work and the knowledge and skills involved. In addition, current M&E methods ignore the fact that

advocacy is not done by one organization on its own, but engages multiple actors. They do little to bring together stakeholders (one's organization, allies, and partners), to interpret the significance of the advocacy work and its link with its achievements. They do not address questions of interpretation of achievements, and failures and challenges are not collectively addressed. Collectively obtained experiences and lessons are therefore not used for planning next actions. Unpacking the inside of the 'black box' will help organizations to understand and learn about advocacy work. Explaining advocacy and the relation with its results to the internal audiences supports advocates in their own organization. Collective interpretation and sense-making of advocacy work in relation to results has the potential to strengthen coalitions and networks and the impact of their collaboration.

External communication

Commonly used M&E methods do little for external communication. They tend to lead to reports that are technical in nature and therefore inaccessible for audiences beyond a small circle of experts. These reports are not well-suited to convey advocacy achievements, which often are steps towards impact rather than forms of impact. Advocacy results easily remain out of view or meaningless for supporters and wider publics. In addition, lack of impact on constituencies can be mistaken for a lack of significance if the significance of the results is not articulated. For example, achieving an adjustment to a policy document may result from great collective efforts made over many years. However, it should be clarified how that change is or may become helpful to constituencies or society at large. This is not simply because policy processes are technical. Again, the outcomes of advocacy for development are often interim in nature, banking on *future* policy processes to attain the ultimate legitimacy of positive impacts such as increased access to clean water, food security, or a living wage. In existing M&E methods, this is not considered. We therefore expect that explaining advocacy and the relation with its results through Narrative Assessment stories to supporting donors and the public at large can help build support for past and future action.

HOW NARRATIVE ASSESSMENT BUILDS ON EXISTING APPROACHES AND METHODS

While Narrative Assessment offers an alternative approach, it also builds on existing approaches and methods that are currently in use for planning, monitoring, and evaluation: narrative methods, collective sense-making approaches, and Theory of Change. This is outlined below.

Narrative methods

Several existing methods for monitoring and/or evaluation include stories, such as Performance Story Reporting[14]; Most Significant Change[15]; Collaborative Outcomes Reporting[16], and Narratives of Change.[17] The potential of stories to learn about change in complex development contexts is widely seen. However, stories have been part of evaluation methodology to only a limited degree, mostly putting the capturing of programme impact in participants' or beneficiaries' stories at its core.[18]

So far, ideas on the importance of stories and development of methods have not led to a story-centred approach specifically adapted to advocacy monitoring and evaluation. Importantly, current methods do not engage with the fact that advocacy achievements mostly do not lead to direct impact, but to steps in a longer process of change. These steps can best be understood from a Theory-of-Change perspective, best accessed by engaging the advocates themselves whose strategic manoeuvring we would need to understand.

Existing methods also do not help in making advocacy understandable or realistically justify investments. They do not incorporate inquiry into practical judgement and advocacy processes. In complex situations with many unknowns, and a key dependence on the nature and quality of advocates' practical judgments, understanding advocacy and its results would demand attention to just that. The nature and quality of that judgment in a certain context, incorporating analyses of strategic options and considerations, chances at success, while balancing opportunity, cost and risk can only be conveyed through stories.[19]

Finally, important here is that existing story-based approaches in evaluation do not make optimal use of the communicative potential of stories. Nor do they adequately address the risks that need to be acknowledged and dealt with when it comes to stories, in particular their tendency to idealize, highlight and lowlight certain aspects, acts or events, rather than simply providing a factual account of 'what happened'.[20]

In short: while stories help to provide a view of the reality of advocacy work and achievements in a way no existing method can, Narrative Assessment stories go beyond that, by building in robustness and credibility through the critical inquiry techniques used by the Narrative Assessment facilitator.

An example illustrating the approach is Outcome Harvesting. Narrative Assessment's way of working builds on outcomes created through Outcome Harvesting.

Outcome Harvesting is an evaluation method that similarly collects achievements with an open-ended approach, includes the incorporation of evidence of what has been achieved, and works backward to determine whether and how the project or intervention contributes to the change.[21] Outcome Harvesting is flexible, accommodating the complexity of change and adaptation in interventions. However, Outcome Harvesting does not centre on interpretation, the narrative construction of how outcomes and the path towards them are to be understood and described from the Theory of Change (whether formally named as such or not) that advocates work with. It constructs the connections between outcomes only to a limited degree, and importantly, does not focus on making comprehensible how they could come about. Outcome Harvesting also doesn't involve reflection on challenges confronted during programmes – why outcomes did not come about, what dynamics and conditions may have contributed to that, and how such issues were engaged with. Finally, Outcome Harvesting doesn't address challenges involved with gathering evidence for advocacy evaluation. In a way, Narrative Assessment seeks to form a response to Outcome Harvesting to address these issues, innovating upon it.

Collective sense-making methods

Several methods involve collective sense-making through interpreting outcomes (e.g., Most Significant Change; Collaborative Outcomes Reporting). Narrative Assessment builds on these, from the starting point that bringing together different viewpoints and interpretations helps to build more robust knowledge and evidence regarding the effectiveness of advocacy programmes. An innovative dimension in Narrative Assessment is the role given to critical inquiry of sense-making. In this, Narrative Assessment draws on Narrative Inquiry, accepting that robustness will be aided by an optimal substantiation of claims provided in stories. Advocates' practical judgment forms an important contribution to that substantiation. This acknowledges the importance of contextualization, balanced with enhancing robustness and credibility through critical inquiry.

Theory of Change

Narrative Assessment is closely linked to Theory of Change in two ways, Firstly, the construction of meaning involved in the co-construction of stories (what happened, why, how relevant are our achievements, how can disappointments and challenges be understood) takes place in light of Theory of Change. Secondly, reflection on the strengths, limits and gaps in analyses and capacities to achieve change is to feed into reflection on the ways past action holds up against Theory of Change, and to inform future action. Theory of Change allows focus on longer-term impacts rather than short-term results. As Theories of Change make assumptions and pathways of change explicit, a Theory-of-Change process facilitates reflection, interaction and adjustment when it comes to assumptions and understandings of how change happens. This supports critical reflection on how an intervention may actually contribute to desired change. It can take into account that achievements and change caused by other influences create new conditions for programmes. Programmes can be expected to improve their effectiveness with the capacity to act on these conditions and adjust in such situations, rather than by holding on to planned actions.[22] It also facilitates interaction and adjustment across different actors in a programme. Theory of Change in an interactive process of deliberation and critical reflection may help to confront and engage with differences.[23] Theory of Change is hereby hailed as potentially helpful in articulating assumptions and pathways of change, and dialogue and adjustment over time, as programmes unfold, as well as evaluation.[24] Many reports and practical guidelines engage with Theory of Change and its potential merits in terms of its focus on assumptions and pathways of change. This is considered fundamental to devise, understand and adapt interventions.

Theory of Change can be a fundamental starting point for advocacy monitoring and evaluation because of the complexity of the processes of change that advocacy programmes seek to contribute to, and the complicated nature of interventions. Relating to a programme's Theory of Change, advocates can articulate how outcomes fit specific pathways of change, allowing for flexibility in accounting for the way programmes unfold. The interpretation of outcomes by relating to Theory of Change also makes it possible to specify and clarify Theory of Change as directly relevant for the outcomes at hand. It also facilitates establishing where programme theory had not worked out as foreseen, and how this can be explained.

In advocacy monitoring and evaluation, it is commonly accepted that outcomes will often only be steps in the direction of the desired change. Programmes are often oriented towards normative and legal frameworks, often at multiple levels, concerning, for example, human rights, biodiversity, gender, and reproductive health and rights, or climate change mitigation. Time frames in programme theory are typically many years longer than the duration of programmes.

With advocacy outcomes largely remaining at a remove from impact, relevance for constituencies can and should be *theorized*, banking on future changes that in the end

are to contribute to impact. Outcomes can be accepted as relevant when they can be constructed, plausibly, as steps in the direction of desired change; a step in a long journey that can be assessed in the context of many other steps*, including future ones*.

Bringing Narrative Assessment together with Theory of Change thinking acts as a double-edged sword: theorizing (especially hypothesizing future pathways) is strengthened, as well as the review of assumptions about strategies and pathways built into the Theory of Change.

FOOTNOTES

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GLOSSARY

HIVOS
Humanistisch Instituut voor Ontwikkelingssamenwerking. Hivos as a humanist institution believes that human life in its many forms is valuable and that people are filled with potential.

OUTCOME HARVESTING
Outcome Harvesting collects ('harvests') evidence of what has changed ('outcomes') and then, working backwards, determines whether and how an intervention has contributed to these changes.

MOST SIGNIFICANT CHANGE
The Most Significant Change technique is a qualitative and participatory form of M&E. It is based on the collection, systematic selection, and analysis of stories of significant changes attributed to an intervention.

THEORY OF CHANGE
Theories of change are the ideas and hypotheses ('theories') people and organizations have about how change happens. These theories can be conscious or unconscious and are based on personal beliefs, assumptions and a necessarily limited, personal perception of reality.

ADVOCACY
Any action that speaks in favor of, recommends, argues for a cause, supports, defends, or pleads on behalf of others. Advocacy can include many activities that a person or organization undertakes including e.g., social media campaigns, public speaking, publishing research, and lobbying.

OUTCOME MAPPING
Outcome Mapping is a set of tools used for planning, monitoring, and evaluating interventions aimed at bringing about social, economic, or technological change. The idea is that to succeed, an intervention needs to involve multiple stakeholders. OM connects 'outputs' to 'outcomes' by focusing on the patterns of action and interaction among stakeholders.

NARRATIVE ASSESSMENT
Narrative Assessment is a systematic monitoring and evaluation approach to making sense of the realities underlying advocacy results. It starts from the stories of advocates themselves and focuses on unpacking the dynamics and contribution of advocacy work, to inspire learning and to support program adaptation and communication.

NARRATIVE INQUIRY
Narrative inquiry is a form of research that centers on the stories research participants tell about their experiences. It is based on the premise that, as human beings, we come to understand and give meaning to our experiences through stories.

CO-CREATION
Co-creation is a way of working, or form of strategy, that brings different parties or actors together to jointly work on a mutually valued outcome or proposal. Co-creation brings a blend of perspectives and ideas from the different actors to generate proposals and solutions that supposedly are richer

SENSE-MAKING
Sense-making is the process by which people give meaning to their collective experiences. There are various tools to support collective sense-making.

PLAUSIBILITY
The quality of seeming likely to be true. Building and examining plausibility of stories is central to Narrative Assessment.

NARRATIVE ASSESSMENT FACILITATOR
Person who conducts the Narrative Assessment interview and possibly also creates the story from that. This person is versed in constructively posing critical questions to help the advocate tell a plausible story.

A new method for monitoring, evaluating, learning, and communicating about advocacy