



Standard Operating Procedure (SOP): Equitable Story Collection

Table of Contents

Standard Operating Procedure (SOP):	1
Equitable Story Collection	1
Table of Contents	1
1. Purpose	2
2. Scope	3
3. Frequency of Storytelling	3
4. Roles and Responsibilities	4
5. Communications Procedures	4
6. Ethical Considerations	5
Ethical & Equitable Accountability Checklist	5
7. Recruitment	6
A. Preparation	6
B. Approaching the Client & Recruitment	7
C. Consent Process	9
8. Collection Guide/Procedure	9
A. Facilitator(s) Guide	9
Facilitator(s) Guide	9
B. Storytelling Formats	11
C. Editing, Submission, and Storage	13
Editing	13
Submission	13
Storage	14
9. Emotional Support Plan	14
10. Review & Updates	15



1. Purpose

TIP: As you work through this SOP template, be sure to customize it to meet your specific organizational needs and goals. This is simply a guide - do not give up or sacrifice any of your organizational values!

To establish a clear and ethical process for collecting and using stories from [Org Name/“clients, community members, etc”] for outreach, reporting, fundraising, and impact documentation while maintaining dignity, respect, and privacy.

The overarching goal of storytelling at [Org Name] is to [name your mission, vision, and organizational goals].

Example: The overarching goal of storytelling at Loaves and Fishes Ministries is to cultivate a deeper understanding, empathy, and active engagement within the community to advance our mission of serving families and individuals struggling with basic needs.

More specifically, this overarching goal can be broken down into several key objectives:

- [outline objectives as it makes sense for your organization based on specific activities and programs]
- *Example: To Humanize the Experience of Need: To move beyond statistics and provide a personal, relatable face to the challenges of poverty, homelessness, addiction, and other struggles, fostering genuine empathy and compassion amongst our audience.*

Ultimately, our goal of storytelling is to transform passive awareness into active support, empowering [Org Name] to continue and expand its vital work in the community while simultaneously empowering individuals with lived experience to share their stories in ways that feel meaningful, powerful, and impactful.



2. Scope

This standard operating procedure (SOP) applies to all team members who engage both directly and indirectly with [clients/community members/individuals with lived experience], including those who collect personal stories, testimonials, or quotes, and those who communicate and share these stories with the broader community. The inclusion of all team members in this SOP is pertinent to ensure that the process of story collecting and storytelling is carried out equitably in a consistent manner, and thus institutional knowledge is shared across the organization.

3. Frequency of Storytelling

TIP: Consider how frequently you want to publish stories. Continuously? Only when a notable story arises?

Example: To ensure a continuous flow of compelling narratives and consistent communication of our impact, [Org Name] will adhere to the following storytelling frequency:

- Each program will submit at least one storytelling report [decide on a frequency that works best for your team, community, and organization as a whole]. This report should contain a narrative or set of narratives suitable for sharing with our various audiences. The [quarterly] submission schedule ensures that our communications remain fresh and relevant, reflecting the ongoing work and impact across all our services.
- These [quarterly] reports will serve as the primary source for developing content for our website, social media channels, newsletters, donor communications, policy advocacy, and other outreach efforts. We encourage [programs/staff/team members] to proactively identify and document stories as they unfold, rather than waiting until the end of



the quarter, to capture the most authentic and timely accounts of transformation and need.

4. Roles and Responsibilities

Role	Responsibility
[Executive Director]	Oversee the process, train staff on SOP, review collected stories, ensure ethical use, and communication strategies
[Story Collector (Program Staff)]	Interview storytellers, obtain consent, revise stories for anonymization, and submit documentation
[Volunteers]	Recommend clients to staff members. Help facilitate client:staff connection if needed <i>(Volunteers should not be collecting stories unless explicitly expressed by the Executive Director)</i>
[Clients/Community Members/Individuals with Lived Experience]	Telling stories, hold accountability in how their story is presented

5. Communications Procedures

- The audience of these stories is [name your audience: community at large, staff, funders/donors, Board of Directors, etc].
- Stories are to be shared in the following formats: [Consider your organization's capacity, both staffing and technological, and determine what formats you will be sharing stories in i.e. written, photo, audio, video, or some combination].



- Stories will be shared through the following communication channels:
 - [add as appropriate. Some examples listed here.]
 - Newsletter
 - Year-end report
 - Website
 - Social media
 - Spoken during events (with permission)
 - Possible media outlets (if/when media outlets reach out, Executive Director will redirect them to storytellers for permission)
 - Posters or flyers to hand out.]

6. Ethical Considerations

- Consent: No story is collected without a signed consent form.
- Confidentiality: Never publish identifying information without explicit permission.
- Dignity: Avoid sensationalism; center the client's voice and humanity.
- Trauma-Informed Care: If a client becomes distressed, stop the collection process immediately.
- Voluntariness: Clients can decline to participate at any time, without reason.

Use this checklist as you work through the storytelling process:

Ethical & Equitable Accountability Checklist

To be used by the person(s) collecting the story - Often, stories are told without considering ethics and equity. Prioritize working through this checklist together with yourself and the storyteller to ensure all involved parties feel seen and respected in this process.



- ☐ I have permission to tell this story (from the storyteller and/or others involved). The consent form has been signed.
- ☐ I have offered the opportunity for the storyteller to remain anonymous, if desired.
- ☐ I've avoided stereotypes or "deficit framing", a focus on highlighting the negative, the challenges, the struggles, and the problems within a story which often leads to defining people by shortfalls rather than strengths.
- ☐ I have made sure to avoid "trauma porn," the practice of commercializing or sensationalizing someone's trauma graphically through the media.
- ☐ The story centers dignity, agency, and context.
- ☐ Together, we have named the systemic causes of the challenge and not just individual experience.
- ☐ If I'm telling someone else's story, I have included them in the review or editing process.
- ☐ I've honored cultural storytelling traditions and formats.
- ☐ I have talked about emotional safety and support with the storyteller as we prepare to share their story.

7. Recruitment

A. Preparation

- Familiarize yourself with the [Glossary](#) before beginning this process.
- Ensure you have the most recent [Consent Form](#) and all three Storytelling Templates available.
- Review materials about ethics, consent, and trauma-informed storytelling.



- Ensure Storytelling flyers and posters are readily available.

B. Approaching the Client & Recruitment

The ethical and respectful recruitment of clients for storytelling is paramount to the values of [Org Name]. Our approach prioritizes dignity, trust, and the well-being of the individuals we serve.

Program Staff as Key Identifiers

- Front-line program staff (case managers, shelter staff, food pantry volunteers, etc.) are often best positioned to identify individuals whose stories might be impactful and who demonstrate a willingness to share. They have established relationships and a nuanced understanding of client circumstances.

Focus on Transformation and Resilience

- While stories of need are important, prioritize individuals who have experienced positive transformation, demonstrated resilience, or achieved significant milestones with the support of [Org Name]. These narratives are often more inspiring and empowering.

Voluntary Participation

- Never pressure or coerce a client into sharing their story. Participation must be entirely voluntary and free from any implication that their willingness to share will affect the services they receive.

Diversity of Voices

- Strive to represent the diverse experiences within the community, including different demographics, program participation, and types of challenges overcome.



Initial Approach and Discussion (The Soft “Ask”)

- Establish Trust First: The initial approach should only occur once a trusting relationship has been established between the client and the staff or volunteer. (Please note: Trust takes time! Trust cannot be created with the sole intention of collecting a story. Be intentional.)
- Casual and Empathetic Conversation: Begin with a casual, empathetic conversation. For example, a staff member might say: “Your journey has been so inspiring, and we often find that sharing real stories helps others understand what people go through and how our programs can make a difference. Would you ever be open to talking about your experience with someone from our team?”
- Clearly State the “Why”: Briefly explain the purpose behind [Org Name] collecting stories and what the story could potentially influence.

Choose an appropriate time to collect the story

- *[Example: Housing Clients, Employment Clients: Offer the opportunity to do this during client consultation meetings. Inform the client of the opportunity during one meeting, share a flyer/infographic, and offer them time to think about it. Follow up in the next meeting to remind them of the opportunity. Maintain printed copies of the storytelling templates in case people would like to share their story immediately.]*
- *[Example: Food Pantry Clients: Offer to help people carry food to their car and tell them of the opportunity on their way out. Have a flyer ready so they can get in contact with you. Maintain printed copies of the storytelling templates in case people would like to share their story immediately.]*

Offer an opt-in, not opt-out approach



[Example: “If you’d be open to sharing your experience to help others understand the impact of our work, please let me know and I’d be excited to go through this process with you carefully.”]

C. Consent Process

- Provide the [Consent Form](#) (paper or digital).
- Explain each section clearly, particularly:
 - How and where this story may be used
 - This is a voluntary process and clients have the right to withdraw their story at any time throughout the process.
 - Options for anonymous submission and photos.
- Ensure the storyteller and staff complete the consent form before you proceed. *No story is collected without a signed form.*
- Inform the storyteller that pauses can be taken – and are encouraged – at any time during the storytelling process.

8. Collection Guide/Procedure

Once you’ve identified a client that has expressed interest in telling their story, proceed with this section. Utilize the Facilitator(s) Guide below as you work through the story collection process.

A. Facilitator(s) Guide

Facilitator(s) Guide

Before collecting this story:

- ☐ Reflect on your identities and the power you hold in this relationship. (Even with consent, inherent power dynamics exist here!)
- ☐ Consider how the storyteller will benefit from this process.



- ☐ Approach this with care. Storytelling is a vulnerable and exposing process.
- ☐ Identify possible notetaking approaches:
 - ☐ Interview - If audio recording, can transcribe notes later (by hand or trusted AI source such as Otter). If the storyteller doesn't want to be recorded, identify a second person to be present as notetaker, with the storyteller's permission.
 - ☐ Autobiography - Transcribe for storyteller or provide pen/paper/computer for storyteller to write their own.
 - ☐ Collective Storytelling - Transcribe for storyteller, provide pen/computer for storyteller to write their own, or take turns doing this together.
- ☐ Ask the storyteller if they would like to have a trusted support person present. This can mitigate any unnecessary risk of putting you as the facilitator or the storyteller in any discomfort/distress.

During story collection:

- ☐ Decide WITH the storyteller the overall goal of sharing their story (raise awareness, inspire action, shift narratives or stereotypes, influence policy/funding, celebrate resilience or success, document history/memory, etc).
- ☐ Decide WITH the storyteller what format they would like to share their story in (see below table and [decision tree](#)), and how note taking will occur.
- ☐ Be ethical, patient, compassionate, and non-intrusive. If a client becomes distressed, check in with the interviewee immediately. Ask if they are okay, ask if they need a break. This gives folks agency around their storytelling process.
- ☐ Utilize agreed upon notetaking process (above).



- ☐ Provide the option to take a photo (see consent form).

After collecting this story:

- ☐ Check in with the storyteller. Ask how they are feeling, what they need. Provide a copy of [Reflection](#) questions to take with them.
- ☐ Offer for the storyteller to give you or another staff member feedback on this process.
- ☐ Provide next steps and how to follow up if they have more questions or would like to add to their story.
- ☐ Finalize and polish the story into its final format (see below for editing, submission, and storage policies).
- ☐ Once the story is finalized/polished:
 - ☐ Share with the storyteller and get either written/verbal approval.
 - ☐ Shred written notes.
 - ☐ Delete notes/template from [appropriate storage drive].
 - ☐ Keep the final story and signed consent form in [appropriate storage folder].

B. Storytelling Formats

There are various ways that stories can be told and collected. Offering clients/community members multiple options is trauma-informed by giving storytellers a sense of autonomy over their story and how it is told.

The following templates can be offered (use [decision tree](#) if helpful):

Storytelling Collection Formats			
	Interview	Autobiography	Collective Storytelling



	(Template)	(Template)	(Template)
Brief Description	An interview allows the storyteller to tell their story verbally, being guided by a facilitator with some structured questions.	An autobiography is a very open ended format, allowing the storyteller to put their story in writing with little to no guidance from the facilitator. (Facilitator could be scribe for storyteller if requested).	The collective storytelling template allows the facilitator and the storyteller to co-create the story together, developing a full narrative with a beginning, a middle, and an end.
Time Required	About 1 hour (for consent and interview process)	At least 1 hour (for consent, overview, and writing time)	At least 1.5 hours (for consent, overview, and collective narrative building)
Organization Goal/ Expectation	Example: <i>Each program will submit at least 1 story per quarter.</i>		



C. Editing, Submission, and Storage

Editing

TIP: Determine your workflow for who will be editing stories. Will it be the person who collected the story? A communications professional? Consider different timelines for editing videos, audio, and written stories

- Example: Follow ethical, respectful, and trauma-informed storytelling processes.
 - Allow at least one hour to edit a client's interview or biography.
 - Copy-edit their story for typos, grammatical errors, or awkward sentences. Your clients will want to be presented with respect and authority for their knowledge and experience.
 - Use people-first language and acknowledge larger systems. Instead of “a homeless person” say “a person who is navigating homelessness” or “a person who was affected by our broken housing system”. Put the person first, not their condition. Give them power and autonomy in the story.
 - Use language that storytellers use themselves. If they did not describe it as a “struggle” or “suffering”, do not insert those words into the story.
 - Check for respect by putting yourself in the story, would you feel respected if someone else described you in this way?
 - If you're able to, show the final product to the client to get any feedback and make sure they feel comfortable with how their story is represented.

Submission

Once a story and its corresponding consent form are fully completed, they must be submitted to the [identify point person for storytelling and SOP management].



Storage

TIP: Storage process will look unique to your organization. Make edits to the following storage suggestions to best reflect your organizational practices.

Digital: All digital files must be stored in a secure, access-limited folder [(e.g., Google Drive with restricted access)].

Paper: Once the story is written and complete, all hard/paper copies should be shredded.

Labeling: Label folders and files using non-identifying naming conventions.

- Folder: ["shelter_Dec2025_BP" (initials of client)]
- Subfolder 1: ["RawData_Deleteby[DATE]" ([DATE] set to the end of the quarter in which raw data was collected i.e. notes were collected in mid-April, so "RawData_DeletebyJune2025")]
- Subfolder 2: ["Story+Consent"]
 - Document 1: Final Written Story
 - Document 2: Signed Consent Form

9. Emotional Support Plan

- Stories can leave us feeling overwhelmed and emotional. Do not push through your work day with difficult or big emotions. Take care of yourself and your needs, including,
 - Take a 15-minute break and reset after a particularly emotional story.
 - Talk to another trusted individual and/or support person at your organization to help you process the story and validate the emotions you were left with.
 - Ask for a hug, coffee, or other small acts of kindness from your colleagues.



- Remember to keep things confidential and avoid emotional processing with other clients.

10. Review & Updates

All staff will:

- Utilize this SOP regularly, as stories are collected, to ensure the maintenance of best and most ethical practices.
- Commit to maintain ongoing relationships with storytellers and update them on story usage as changes occur.

[Project lead/Storytelling Program Manager/etc] will:

- Review storytelling SOP annually or whenever significant changes are made to client engagement practices.
- Review [Google Drive] on a semi-monthly basis to ensure raw data/notes are being deleted and stories are staying organized.

Effective Date: [Insert Date]

Updated Date: [Insert Date]

Approved By: [Insert Name or Title]

Applies To: All staff and volunteers involved in story collection