PNI Practicum II: Larger-scale PNI
Activities

Part 1: Introduction, Fundamentals, Planning

1a. Get NarraFirma set up

Start the course by getting NarraFirma installed and ready to use. The quickest way to set it up is to follow these steps:

1. Search the internet for **one-click WordPress site hosting**. You will find a variety of options, most starting at $5 per month. Choose a hosting provider and set up an account.
2. Login to WordPress. Click **Plugins**, then **Add New**. In the WordPress plugin directory, enter **NarraFirma** into the search box. Install and activate the NarraFirma plugin.
3. Once the NarraFirma plugin is installed, click **Create New Project**. Give the project a short name (with 20 characters or fewer).
4. Click **Start NarraFirma**. Choose your new project.
5. Now you should see the main NarraFirma screen, with a button for each phase of your PNI project (Planning, Collection, Catalysis, Sensemaking, Intervention, Return).

For more details and other options see the NarraFirma web site. (Right now the installation instructions are at https://narrafirma.com/home/setting-up-narrafirma, but that could change.)

If you don't have time

These course materials assume that you will be using NarraFirma to carry out your project. If you intend to do that, the sooner you can get it set up the better. You might even want to get it set up before you start the course. If you need help, ask your fellow students or a tech-savvy friend, relative, or colleague.

Can you take this course without using NarraFirma? Yes you can. Just find another way to store your data, look for patterns, prepare your catalytic materials, and take notes on your progress. You might need to look at NarraFirma (on the web site) once in a while to find out what you need to do in each part of the course, but (especially if you are tech savvy) you can do everything NarraFirma can do with many other pieces of software.

Stretch challenges

If you are able and willing to spend some time up front making sure you will get the most out of using NarraFirma, here are some things you can do to get started with it right away.

- Watch the **video** on the NarraFirma web site. It's dorky and out of date, but it can give you a quick idea of what it's like to use the software.
- Look at a **sample project** on the NarraFirma web site, either the fictional one or the empty one. Poke around in it. See what it's like.
- Open any NarraFirma project (your own or a sample project on the web site). Go the main page and click the Help button in the upper right-hand corner. Then **skim over every help page**. Everything you could possibly want to know (and more!) is explained there.

1b. Observe a story-sharing conversation

Before the conversation

Ask at least two friends, colleagues, or family members (people who are not taking the course with you) to chat. *Don't tell them you plan to listen to stories*. But do ask them if you can record or take notes on the conversation for a course you are taking.

Recording is better if you can do it. If you can't record, take as many notes as you can (while still participating in the conversation).

Observe the conversation for at least fifteen minutes.

During the conversation

As you talk, slide a story-eliciting question (a request for a story abstract) into the conversation. For example, you might say something like, "So, what's up with your cat? What happened at the vet?" or something. See if you can *invite someone to tell you a story*. Notice how they respond. If they don't respond by telling a story, keep tweaking your invitation until it works. Do this a few times.

When somebody does tell a story, encourage them to continue. Then respond to the story with a related story of your own. See if you can get a chain of stories going.

After the conversation

Listen to your recording or look over your notes. Think about the negotiations that took place during the conversation. In NarraFirma, answer the questions in **Planning > Observe story sharing**.

If you don't have time

You can skip this first activity if you want to (or have to). It will not affect the success of your project (beyond helping you understand how stories work in conversation). Hopefully some of your fellow students will have done the activity, and you can listen as they describe their observations.

Stretch challenges

If you want to do more with this activity, consider these ideas:

- Listen to a few **different conversations** in different contexts, then compare what you hear. Listen at work and at home, for example, or at the market and at the library, or during a meeting and during a party. Do you notice different styles of story sharing? What do those styles tell you about those contexts?
- Open *Working with Stories* (not the *Simplified* version), go to chapter 5 ("Stories in Communities and Organizations"), and find the section called "**Assessing Story Sharing**." Answer the questions you see there, as best you can, for each context in which you observed conversational story sharing. What does that tell you about each context?

Part 2: Collection I

2a. Answer some questions about your project and participants

In your new NarraFirma project, click on the button that says **Planning**. On the Planning section page, click on **Describe your project.** Answer the questions on that page.

Afterwards, go back to the Planning section page and click **Describe participant groups**. Create as many groups as you need to describe your participants. Answer the questions about each group.

If you don't have time

Just look at the questions in NarraFirma and think about them without writing anything down. Or just jot down a few notes without thinking about complete answers. Even five minutes of pondering the questions will be helpful to you.

Stretch challenges

If you want to think about your project participants even more, consider these options.

- Once you have finished answering these questions, **ask some of the participants** in each group what they think of your answers. Where do they think you have them right, and where do they think you have misunderstood them? Can you improve your answers?
- Ask some participants in each group to review your answers to the questions **about the people in the other groups**. Is it possible to improve your answers to the point where everyone in every group can be expected to agree? If it's not possible, what does *that* look like? What is the landscape of perception among the groups of people you will be including in your project? Are there broad areas of agreement? Are there immovable disagreements? What does that mean about how you should plan your project?
- Ask some people from each group to choose a few aspects of the questions that they would like to join you in working on. Can you use these questions about participant groups to **get a sense of the potential energy** that might be available within each group to drive change? And can you design a project that draws on that energy to engage and empower everyone?

2b. Tell project stories

In NF, go to the **Planning > Tell project stories** page. Choose one of four magical **scenarios**.

1. **Ask me anything**. If you could ask people *any* question, and they would have to answer it honestly and completely, what question would you ask? For example, you might say, "I wish I could ask people what they *really* think about our business plan."
2. **Magic ears**. If you could *overhear* any conversation, without anyone knowing you were listening, what conversation would you like to hear? For example, you might say, "I wish I could overhear two of my neighbors talking about our plans for our new library."

3. **Fly on the wall**. If you could watch *any event* take place, what would you like to see? For example, you might say, "I wish I could watch people's faces as they encounter our new employee policy for the first time."
4. **Something about your project**. This one's a little different. Instead of a what-if story, it's a because-of story. Choose a specific aspect of your project plans, something that matters to you, and prepare to tell a story about how that aspect affected the project. For example, you might say, "I would like to explore how my plan to bring young and old people together will play out in my project."

After you have chosen a scenario, choose an **outcome** for the story.

- Colossal success – your project succeeds beyond your wildest dreams
- Miserable failure – your project ends in disaster
- Acceptable outcome – your project comes out fine, though it could have been better

Now combine the two elements (scenario and outcome) into a story. For example, you might say, "I asked people what they *really* thought about our business plan, and it was a disaster; I learned nothing at all." Think through or talk through the story.

Do this three times, choosing different scenarios and outcomes each time.

If you want to, you can also go through the story elements exercise in **Planning > Create project story elements**.

If you don't have time

You don't have to write down any project stories. Just look over the scenarios and outcomes above and wait for a few stories to come to mind. Even five minutes pondering the building blocks of some project stories will be helpful to you.

Stretch challenges

If you want to do more with this activity, **bring some of your participants into it** with you. Briefly explain to some people from each participant group what you plan to do. Then show them the scenarios and outcomes for this activity and ask them what springs to mind. Challenge yourself to be surprised, even if unpleasantly, by what people have to say. Use it as a test of your plans.

If people tell you that *nothing* springs to mind for them, that's even more useful information. It means that your explanation of your plan has not sufficiently connected to them to conjure up any stories in their minds. You might be thinking of the project too much from your own point of view and too little from theirs. What can you say about the project that will help every participant envision themselves playing a part in it?

2c. Answer the PNI Planning Questions

In NF, answer the questions in **Planning > Answer PNI planning questions**.

If you don't have time

Don't put aside this activity. It is imperative to at least give quick answers to the six questions posed in this activity. Even if you can only spend five minutes doing this task, don't leave it out.

Stretch challenges

You can get some feedback on this plan from some of your participants. And you can go even further by asking some participants to help you improve the plan in a shared editing session.

Another extra step is to **challenge your answers** to the PNI planning questions by asking yourself some provoking questions about them. After you have written your answers (and maybe gotten some feedback or help improving them), ask yourself:

- Is this answer **certain**? Are we sure this is what we want? Are we sure this is the best plan? Or is this aspect of the project somewhat of an experiment?
- **Why** did we answer this question the way we did? What lies behind this answer? What forces or historical factors have shaped it? Is it rational, emotional, or a mix? What is its source of energy, positive and/or negative?
- Is this answer **contentious**? How much agreement is there among people in our community or organization that this project (or any project) should be designed in this way? If there is disagreement, how does our answer to the question take that into consideration?
- Is this answer **realistic**? Are we indulging in wishful thinking? Can we really expect this to happen? Should we scale back our expectations here?
- What **new stories** does this answer bring to mind? If this project succeeded (or failed) because this decision was correct (or horribly mistaken), what would that look like?

2d. Build your privacy policy

In NF, go to **Planning > Build privacy policy** and answer the questions there.

If you don't have time

This is the most important activity in this part of the course. It's even more important than the PNI planning questions. **If you can only do one thing in this part of the course, do this**. It need not take long, but *you must have something to say to your participants* about what you will do with what they say to you. If you do not address the legitimate privacy concerns of your project participants, you will not collect stories that will be useful for sensemaking. You will still collect stories! But you will collect guarded, superficial stories, and those are not useful for sensemaking.

Stretch challenges

The best thing you can do with your privacy policy is to **ask your participants to help you build it**. Write a first draft, then show it to some people from every participant group and ask them to help you improve it. Keep working until everyone you talk to (in every group) not only *says* they are comfortable with the agreement but also *seems* comfortable with it (in their expressions and body language). Don't just look for consent: look for enthusiasm.

Once you are sure that your privacy policy will be acceptable to your participants, work to make it brief (not demanding), simple (not condescending or intimidating, no jargon), reassuring (giving them permission to safely explore), and empathetic (showing that you understand their perspectives). Your goal is to set every participant at ease so they can apply their unimpeded energy to the important task of working together.

2e. Prepare to describe your project plans

You will only have five minutes to talk, so don't overdo this activity. Just get ready to explain what you plan to do in your project.

If you don't have time

If you have done all (or some) of the other activities for this part of the course, you can literally just show your fellow students what you have done so far. You don't need to spend any time preparing a presentation. Just **show up and show your work**, even if it's messy so far. The point is not to wow everyone with your amazing plans. It's just to get some feedback and support before you start gathering your stories.

Stretch challenges

If you want to get the most you can out of this activity, prepare a serious, polished presentation, as though you really were going up in front of people who will get to say whether your project will or won't happen – because you need permission or funding, or because if nobody steps up to participate, you won't gather any stories to make sense of. Consider some reactions you might get and think about how you should respond to them.

Ending the planning phase (optional)

In NF, answer the questions in **Planning > Reflect on the planning phase**.

Part 3: Collection II

3a. Choose and adapt a story form

Open the *Working with Stories Sourcebook* and choose a story form to use in your project. Then adapt the story form you chose to your unique project.

1. At the start of your form, **add two of the common questions** listed at the start of the story form library. Choose whichever ones fit your project best.
2. Look through the questions in the form you chose. You can add, remove, rephrase, or replace any of the questions.
3. If you want to, "go shopping" through the whole story form library, looking at all of the questions in all of the forms. See if there are any questions you like better than the ones you have now. Just keep in mind the cognitive budget (time, attention, and interest) of your participants.

4. In many questions you will see words in {curly brackets}, such as "{the topic}" or "{your community}" or "{a list of outcomes}". Replace those words with words that apply to your specific project.
5. Every set of answers that specifies "a list of" things should also have an "other" option with a write-in answer. You might also want to include the answers "I don't know" or "I'd rather not say" on some questions. (If you give people a way to say *why* they don't want to answer a question, you'll still get some answers, rather than silence.)
6. At the end of your story form, you might want to add some demographic questions about your participants: age, gender, etc. Remember to collect only as much information as you actually need.
7. To generate varied data patterns, **make sure you have at least two scale questions and at least two choice questions**. Some (but not all) questions can be converted from scales to choices and from choices to scales.

I do not recommend that you build your online story form (in NF or elsewhere) until you have finished your first individual interview. Just keep it in plain text for now.

If you don't have time

This is an important activity. Prioritize it. You can put off gathering your first stories until the next part of the course. But **don't skimp on giving your story form your full attention**. Think carefully about the questions you will ask. If your questions aren't inviting and meaningful to your participants, you won't gather stories you can use in sensemaking, and your whole project will grind to a halt.

Stretch challenges

If you have time, **test your story form** before you use it in your first interview. You can test a story form in any of several ways, as follows. I have arranged these methods in order of increasing utility and difficulty. Do whichever of these things you can in the time (and with the resources) you have.

- Let your story form sit for a while (say overnight), then look at it with fresh eyes (say in the morning). **Try not to like it**. Can you see any flaws in it? Ask yourself these questions:
  - Is it **clear** or confusing? Is it consistent in its tone of voice? In its use of tense and person? Is the experience a smooth one? Or does it get stuck on bumps in the road?
  - Is the form **inviting**, or is it demanding? Is it encouraging or intimidating? Is it hopeful and positive, and not in a fake, toxic-positivity way?
  - Does this seem like an **attractive** experience? Is it lively and energizing, or boringly repetitive? Does it provide an interesting reflective experience?
  - Is it **empathetic**? Is it understanding? Does it respect the unique voice and lived experience of each person?
- Think of a person you know who disagrees with you in some way. What would that person say about your story form? Would they tell a story in response to it? If so, what

sort of story would they tell? Now think of a few more people who disagree with you in other ways. What would they say?

- Find a person who knows nothing about the project, a neighbor or friend or family member. Say something like, "Could I show you something I've been working on?" Then put the form in front of them *without a word of explanation*. Then watch how they react to it. Are they bored or interested? Do they seem pleased or offended? What is their take on it?
- Finally, put your story form in front of some of your actual or potential project participants and watch their reactions.

3b. Gather stories in an individual interview

Before the interview

Schedule the interview. Find one person who knows about the topic you plan to explore and is willing and able to talk to you about it. Ask them to join you for a 30-60 minute interview.

You can meet **in person or online**. It is best to **record** the interview, if you can. If you can't record, prepare to take notes. If you plan to record the interview, get permission from your interviewee beforehand, so there are no surprises when you start.

You can of course do more than one interview. The more practice you get, the more you will learn. But one interview is enough to keep up with the course.

Prepare your introduction. Write up or think through a few minutes of introductory remarks. Briefly explain:

- who you are and who you represent
- what you are doing, why you are doing it, and what you hope to achieve
- what will happen in the interview
- how you will ensure privacy and anonymity (your privacy policy)
- what you will do with the stories you collect and who will see or hear them
- your contact information, in case they want to change or retract what they said
- how they can participate in or find out about the rest of the project

Practice saying this introduction a few times until it sounds natural. When you can start the interview without seeming to read from a script, you are ready.

*In these introductory remarks, **do not mention the word "stories."** Say "experiences." (You will be saying "story" later on, but wait until the person has told at least one story to use the word, so they understand what you mean by it.)*

Prepare your story form. You already should have chosen a story form and adapted it to your project. Before you use it in your first interview, practice using it by yourself. Pretend to interview yourself. Then, if you can, find a friend and ask them the questions. *If a question sounds strange or awkward when you say it out loud, rephrase it until it sounds natural*.

Prepare your plan to ask story elicitation questions. Choose how many story-eliciting questions you want to use.

- If you want to use **just *one* story-eliciting question**, you can just ask it. Have one or two additional questions ready in case the person doesn't respond to the question you chose.
- If you want to use **a *menu* of story-eliciting question**s, decide how you will use it. If you are talking online, you can show it in an email or on a shared screen. If you are talking in person, you can hand your interviewee a sheet of paper with the menu of questions on it. Or you can hand them a "deck" of question cards and ask them to pick one.

Prepare your plan to ask questions about stories and participants. You can have people answer follow-up questions in one of two ways:

- You can **ask your questions out loud**. You will get the most reflective answers when people are talking directly to you. However, this option takes up a lot of time. You will be able to collect fewer and shorter stories if you use up your time asking questions.
- You can **ask people to fill out a form**, either online or on paper. This option makes the interview less conversational, but you can use the extra time to gather more and/or longer stories.

Finally, **save five minutes** at the end of the interview for an **after-party**, when your interviewee can reflect on the experience they just had.

During the interview

During your introduction

Start with the introduction you prepared and rehearsed. If you will be using paper or online forms, briefly show them now, so people can see that they have an obligation to fulfill before they leave the interview.

Turn on your audio recorder or prepare to take notes.

Next, ask (or show) your (one or more) prepared story-eliciting questions.

Expect a pause as people take in the question(s). Don't rush to fill the silence. Let them think for a minute. If the silence goes on for a very long time, say or show the question(s) again, rephrase the question(s), or bring out more questions.

- **Don't ask if people understand** your goals or method. Don't mention PNI. Don't give a lecture on what a story is and isn't, *even if people ask for one*. Don't expose the "plumbing" behind what you are doing. If you do, people will use up your interview time discussing the "pedagogy" or "intellectual rigor" of your approach.
- **Don't tell a story**, even if you are sorely tempted to provide an example to people who seem to demand one. Just keep asking your story-eliciting questions, rewording them if necessary, until people start responding.
- **If you get really stuck**, try a self-fulfilling prophecy. Say, "When people get together and talk about things, they usually end up telling some stories about their experiences. That's what we're doing today." Yes, you said the word "story" before anyone told a story. But when people don't pick up *indirect* references to storytelling, sometimes you have to give them *direct* references. (It's still better than telling a story yourself.)

Don't set a time limit for the storytelling. The moment you do that, you have transformed an open story-sharing conversation into a closed story-performing transaction, and your interviewee will stop reflecting on your questions and start giving you whatever it is they think you want from them. Just let them talk (but see below for advice on what to do if they talk for too long).

As the first story starts

If your interviewee responds to your question(s) with something that is not a story, **help them make it into a story** by asking follow-up questions, like these:

- (If they state an opinion) Can you think of a **particular time** when that was true?
- (If they mention a long time period) What was a **high or low point** of that time for you?
- (If they state a fact) How has that state of affairs impacted you? Was there ever a **time** when you experienced something personally related to it?

Keep drawing their attention back to **times, events, and experiences**. (You can think of it as: TEE off a story.) Most people will eventually pick up on what you are asking them to do and start doing it.

When your interviewee does start telling an actual story – and this could happen right away, or it could happen after five minutes of clarification – provide abundant positive feedback. Lean forward. Nod. Say "wow" and "hm" and "really?" Look interested, and not in a fake way. Show them that *this is what you were looking for*.

During the first storytelling

It's okay to ask respectfully curious questions as a story is being told. They don't have to be on your story form. Don't interrupt, but do watch for a signal that the storyteller would appreciate an encouraging question. Often a storyteller will **pause** in the middle of their story and seek out a reaction from their audience. When you see this, take the cue and respond. Say, "What was *that* like?" or "Wow, what happened after that?" **Give the storyteller a reason to stay in the story** until they have finished telling it.

As the story begins to draw to a close, **continue to respond** in a way that shows you heard the story and understood the perspective from which it was told. Even if you didn't *like* the story, you can still honestly say that you heard it.

What if the story *doesn't* draw to a close? What if the person goes on and on? Two different responses are appropriate in different contexts.

- If the person is talking for a long time *because they have a deep need to express themselves*, **let them talk** for as long they seem to need to. As soon as their need to be heard seems to have been met, signal to them that it's time to move on to the next part of the interview.
- If the person is talking for a long time but does *not* seem to be communicating a deep need to express themselves, respond in the same way you normally would when a person goes on for a very long time in conversation. Look away or down; fidget; say "uh-

huh" in a let's-move-on sort of way. Don't cut them off, and don't be disrespectful. But do signal to them that it is time to move on.

Whatever you do, when the person has stopped telling their story, **don't thank them for it**. Doing so makes the story sound like a *thing*, a thing you took from them. If you want to thank them, thank them for *telling you the story*. That brings their attention to the *event* of the storytelling, not the story itself.

After the first story is over

When you are sure the story is over, **ask the questions** on your story form.

- If you are asking your questions out loud, try to blend them into the conversation. Don't say, "Okay, now I have to ask you these questions." Just say, "Wow, thanks for telling me that. How do you *feel* about that story?" and so on.
- If you are asking your questions using an online or paper form, show the person the form and say, "Could you please answer these questions about the story you just told?" Then, as they fill out the form, be ready to discuss their answers, if they want you to do that. If not, sit patiently and wait for them to be ready to tell another story.

As more stories are told

After the first story has been told and the first set of follow-up questions have been asked and answered, it's time to go back to your story-eliciting questions.

- If you asked one question, ask your interviewee to see if they have another answer to the same question. Or you can ask a second question.
- If you gave your interviewee a menu of questions, you can ask them to look over the menu again and choose a different question to answer this time.

As you go through the interview, keep asking for stories, listening to them, and asking follow-up questions. Just watch your time so you don't miss out on the after-party.

During the after-party

When you have about five minutes left, **ask your interviewee to answer some questions about themselves**. Do not ask people to answer questions about themselves at the start of an interview. It will put them off telling stories. Keep the attention away from them until the end of the interview.

After those questions are taken care of, **start the after-party** with a question like, "So how was that? What was it like for you?" Then listen to what they have to say.

They may want to keep telling stories. If they do, that's great. (I always plan some extra time in case interviewees want to keep the party going.) Ask if they mind if you keep recording (or taking notes) and keep asking them questions about the stories they tell. If they are fine with that, you can extend the interview. If they don't like that, **just let them talk**. Your goal is to stay with them until they feel fully heard – or as fully heard as you can help them feel, anyway.

After the interview

Immediately after the interview is finished, **check your stories**. If they are in the form of notes, go back and see if there is anything you want to add to them. If you made an audio recording, check it now. If something went wrong, the stories are still fresh in your mind, and you can capture some notes about them.

In NF, if you want to, go to **Collection > Enter story collection session records** and answer the questions there. (That page is mainly for group sessions, but it will work for an individual interview as well. Just skip the questions about interactions among participants.)

If you don't have time

I have set up this course to help you practice gathering stories in four different ways:

- through individual interviews
- through group interviews
- in group story-sharing sessions
- with a web or paper survey

I recommend that you avail yourself of all of these opportunities to learn. However, you don't *have* to collect stories in all of these ways to learn from this course. What you do need is **at least 100 stories**. It is up to you how you will gather them in the time and with the participation and resources you have available to you.

If you are already used to gathering stories in interviews, for example, you might want to put more time into facilitating story-sharing sessions. Or if you have already done a lot of surveys, you might want to skip that aspect of the course. You can get more stories using a survey, though, so if you don't want to use one, make sure you have scheduled plenty of interviews and story-sharing sessions.

Remember that you have a total of **six weeks to gather 100 stories**. If your story collection starts up slowly – say you can't get people to talk to you, or people are too busy, or *you* are too busy – don't worry. You can collect all of the stories you need even in the last two weeks of the six. They will be busy weeks, but you can do it. Just focus on being ready to move on to the next part of the course when the six weeks of story collection are over.

Stretch challenges

How can you do more when gathering stories in individual interviews? Here are a few ideas.

- Don't do your very first interview with one of your project participants. Rehearse it with a friend, colleague, or family member. And ask your rehearsal partner to challenge you. Ask them to respond to your eliciting questions without telling stories, then practice guiding them toward storytelling. After they do tell a story, ask them to challenge your questions about the story. See if they can help you improve your interview practice before you speak to your project participants.

- Record yourself interviewing someone (either in the project or during a rehearsal). After the interview, listen to the recording and evaluate your behavior. Consider these questions:
  - When in this interview did I show **respectful curiosity**? Did I ever fail to do that?
  - How well did I support the **rituals** of storytelling? How did help the interviewee through the beginnings (abstract), middles (evaluation), and ends (coda) of the stories they told? How did they respond? How could I have done that better?
  - During the course of the interview, what sorts of **needs** did the interviewee communicate to me? Were they bored, annoyed, offended, confused, intimidated, or excessively compliant? Did I **notice** those needs? Did I address them? What could I have done better?
  - What subtle **signals** did I send to the interviewee about what I wanted them to do or say – for example, on how to frame the story, how long to make it, what language to use, how much to reveal, how much emotion to express? Did they pick up on those signals? Did I send any signals unintentionally? What was the result of that?
- If you want your individual interview practice to be more complete (with relation to your project), interview at least one person from each of your participant groups. If you do that, you will be sure to have covered that mode of story collection from each perspective.

3c. Transcribe your collected stories

If you made an audio recording of your interview, listen to it now and convert the stories in it into written text. (Using a transcription service or software is also okay.)

If you asked your questions about each story in the interview (instead of, say, asking people to fill out a form), you don't have to transcribe *that* part of the interview. Just fill out a copy of the story form with the answers the person gave you. You only need a *verbatim* transcript of the actual stories, plus any answers to free-text questions you asked.

If you don't have time – to transcribe any stories at all

You can use audio stories in sensemaking, and sometimes it is the best option, for example for older people, children, or the illiterate. But for most people, text stories are so much easier to handle that in practice, most story workers record and transcribe the stories they collect. Careful transcription can capture much of the meaning in told stories while reducing the effort required to get them ready to use in sensemaking. (Be sure to read the section of *Working with Stories Simplified* on transcribing stories.)

However, transcription does take time. If you know going into this course that you will not have time to transcribe the stories you will collect, or if you know you don't want to transcribe your stories for some other reason, you can plan to use either of two methods of getting story texts ready for sensemaking.

First, you can **take notes** on each story, or have a helper sit in on your interviews and sessions and take notes. Then you can use the notes in your sensemaking, also **making each story's audio version available** in case people want to hear the rest of the story.

Second, you can **ask your participants to summarize their stories** in writing just after they have finished telling them (to you or to other project participants). Just put a big empty box at the start of your story form and label it with a prompt like "Please summarize the story you just told. What happened in the story?"

Asking people to summarize their stories **saves time** you would otherwise have to spend transcribing stories or cleaning up automatic transcripts. You can use that extra time to gather more stories from more participants. If your participants are used to writing things down, they might not mind helping with the project in this way. Also, if your participants do not trust you, they may not be willing to trust that your transcripts will be verbatim (and not, for example, censored). Giving your participants **permission to craft a written version** of their story, one that captures what mattered to them in the story they told in speech, gives them more power over the project.

The write-what-you-said option does require **more time and attention** on the part of your participants. As a result, some people may write little or nothing. So don't choose this option if you don't think people will be able or willing to summarize their stories. Take notes or make recordings and transcripts instead.

If you don't have time – just for this first interview

You can put off transcribing your stories until you have conducted a group interview. You could even put off the task until you have facilitated a story-sharing session, though you will have some catch-up work to do then.

Stretch challenges

If you want to be extra certain that your story transcripts are correct (just the first ones or all of them), you can ask your participants to review them. Contact your interviewees, show them your transcriptions, and ask if there is anything they would like to correct or change.

My experience has been that participants like this, but about one out of twenty actually send any feedback. (Still, people like it, and that improves the chance that some of them will be willing to participate in later parts of the project, like sensemaking sessions.) And if people do respond with feedback, you can use it to adjust your transcription style until everyone is happy with what you have made of what they said.

3d. Improve your story form

Now that you have used your story form, how could you improve it? Make any changes you think will help you get better stories and answers to questions.

If you don't have time

Unless you have encountered major problems with your story form, you can skip this activity without much loss to your project.

One way to improve your story form as you gather stories is to **grow your questions as you gather your stories**. In your first interview, ask your questions about the story in a completely open-ended way, with no lists of answers to choose from. Just let the interviewee say anything they want to say (even if you already have a draft list of answers). Then do a second interview. This time, use draft answer lists. Invite the interviewee to choose an answer from the list or supply a new one. Then, if you can, do this a third time. In this way you can **let your answer lists emerge** from the experiences of your participants, making it more likely that people in your later sessions will find choices that describe their feelings.

You might be wondering: Why use answer lists at all? Why not ask open-ended questions throughout the story collection process? You *can* do that, of course. The problem is that open-ended text responses aren't all that useful in sensemaking. Most people don't have the patience to read through long, detailed free-text answers during a sensemaking session. It's hard enough to get them to read the stories. **Countable answers generate interesting visual patterns**, and interesting visual patterns help people make sense of the data you collected.

You can generate countable answers yourself by coding free-text answers, but then you run the risk of inserting your own bias. In my experience, the best way to help people make sense of their own data is to **help them build visual patterns** with well-written and well-tested answer lists. If you always include a write-in option, and if you listen to your participants as you develop your answer lists, you won't be silencing anyone.

3e. Build your NarraFirma survey

Now that you have built your story form, tried it out in a real interview, and made some improvements to it, it is time to get it ready for more people to use.

In NF, enter your story form using these pages in the **Collection** section:

1. Write story eliciting questions
2. Write questions about stories
3. Write questions about participants
4. Build story forms
5. (Optionally) Translate story forms

It is important to understand that in NF you begin by building **a library of questions**, then draw on that library to build your story form. The lists of questions on the "write questions" pages are not automatically asked. They just sit there waiting for you to put them into a form. (I say this because people are often confused about that point.) While editing your story form, use the Preview button to see how the form looks before you use it.

If you don't have time

You don't have to use NarraFirma to enter your stories. You can enter them into a spreadsheet, then import them in to NarraFirma (it's technical, but maybe you can handle that). And you don't have to use NarraFirma to find patterns in your data, either. I think it's useful, but I'm biased.

Stretch challenges

There isn't much extra you can do here. At this point you should already have written and improved your story form in plain text format (say in a word processor), so this is a simple data entry task. Can you build your story form in NarraFirma from the start? Absolutely. I just thought it might be difficult to do that if you haven't used NF before. But it's up to you.

Part 4: Collection III

4a. Gather stories in a group interview

Group interviewing is an excellent way to gather stories, especially when your participants have had similar experiences, because **they will remind each other** of experiences and emotions you can't guess at. Group interviews work especially well with older people (who tend to forget until they are reminded) and with people who are afraid to speak up.

A group interview is like an individual interview, except that:

- There are multiple storytellers in the conversation, not just one.
- Every storyteller can hear and respond to the other storytellers.
- When you engage with one storyteller, everyone else can hear you.

These differences mean that you have to a few things differently when you set out to interview multiple people at the same time.

Build your groups carefully

Don't interview participants together if they have widely varying amounts of power in any context that matters to your project. If you do, the powerful people will talk and everyone else will listen. And if you force the less powerful people to talk, they will say what they think the powerful people want to hear.

Some mixing of people with varied experiences can be helpful. Experts and novices are two good groups to mix. Novices are very good at keeping experts from saying "you know how it is" and stopping there (without actually telling any stories). But don't mix people with *wildly* varying experiences, like (say) people who have lived in a big city all of their lives and people who have never left the countryside. They will not remind each other of anything. If your goal is to improve communication among people with wildly varying experiences, gather your stories from both groups separately, then bring the stories together during sensemaking.

Give everyone code names

In an individual interview, you don't have to keep track of who said what; there's only one storyteller. In a group interview, things are more complicated. You need to keep track of who told what story, but you don't want to identify people by name. **Give each participant a unique identifier**. It can be a number, a letter, an animal, or a type of cloud – it doesn't matter, as long as you stick to the same system throughout the session.

Help your participants build story chains

In an individual interview, there is a one-to-one ratio between story-eliciting questions and stories. You ask: they tell. In a group interview, story-eliciting questions are only there to get the ball rolling. Most of the stories collected in a group interview should be told in response to other stories. You ask: they tell, and then *they* tell, and *they* tell, and so on.

Story chains emerge naturally in many groups, especially when people know each other. You may find that you only need to use your story-eliciting question(s) once, and that all of the rest of the stories in the interview flow in a chain from that one spark.

On the other hand, you may need to **relight the fire** a few times as the interview goes on. Especially when people don't know or trust each other, or when the topic is sensitive, you may need to step in and give the group a nudge from time to time.

To help people build story chains, practice these steps.

- As each story is being told, **listen for hooks**: aspects of each story that might connect them to other stories not yet told. Notice elements like characters, locations, behaviors, emotions, events, challenges, and so on.
- As each story ends, **wait and see** if another story comes bubbling up. Let the group sit in silence for a moment.
- If nobody says anything, **reinforce the permission** to respond to the story with another story. Say something like, "Has anyone else had an experience like that?" And then wait a bit longer.
- If nobody still says anything, **bring out your hook**. Say something like, "That story took place on a train. Has anyone else had an experience on a train that related to ___ (the topic)?" Or, "The people in that story really trusted each other. Can anyone else remember a time when trust was important to them?"
- If that doesn't work, bring the group's attention back to your **eliciting question(s)**. Rephrase them if necessary.

Should you "go around the circle," asking each person to share a story in turn? I don't recommend it. It's harder to get a story chain going when stories *must* be told in a certain order. Plus, giving everyone a turn makes storytelling seem like more of a performance than a conversation. The better thing to do is to help story chains grow by strengthening the links between stories.

As you do this, though, **keep track of who has and has not told a story**. When the next pause comes, say something like, "We haven't heard from Jarah or Aline yet. Is there an experience either of you would like to tell us about?" But don't *make* anyone tell a story. If a person doesn't want to speak up, leave them alone. They might still be interested in a one-on-one interview.

Save your story forms for the end of the session

In an individual interview, asking questions just after each story is told does not interrupt the flow of the conversation. It *is* the conversation. In a group interview, **you can't ask questions after each story**, because everyone *else* will have nothing to do.

Instead:

- After each participant has finished telling a story, ask them to **give their story a name**. Say, "What name would you like to use to refer to that story?" If people don't seem to want to do this, give the stories names yourself. Make sure the names are short, simple, and visual, like "The advisor" or "Maybe tomorrow" or "In Spain." **Keep a running list of story names** (and who told them) on a whiteboard or notepad.
- When there are ten minutes left in the interview (before the time you saved for the after-party), **ask each person to fill out a story form for every story they told**. Show or give each person a list of story names.
- If you are not recording and transcribing stories, make sure your story form has big empty box for people to summarize their story in.
- Make sure everyone can see that everyone else is also filling in their story forms. If you let people answer questions in a staggered fashion, half of them won't do it. Peer pressure is a wonderful way to get people to do possibly-boring things.

After the session

In NF, go to **Collection > Enter story collection session records** and answer the questions there.

If you don't have time

Try to do at least one group interview, if you can. The dynamics are different than in the individual interview or story-sharing session. You can hold a group interview with two people in an hour.

Stretch challenges

As with individual interviews, it would be most comprehensive to hold one group interview with each group of participants in your project.

Here's another idea: Read "The Ultimate Guide to Anecdote Circles," which the Anecdote group has published here:

https://www.anecdote.com/pdfs/papers/Ultimate_Guide_to_ACs_v1.0.pdf

Anecdote circles are basically the same as what I call group narrative interviews (and I worked with Shawn Callahan ages ago, so some of our ideas come from the same place). After you read that (excellent) document, hold another group interview, incorporating what you have learned from it as well as what you have learned from me.

In general, you should feel free to incorporate any resource or exercise you find that supports participatory story work into this course. As long as it is meant to help people share stories with each other and make sense of them together, it's fair game.

4b. Transcribe and enter stories

As you did for the individual interview, convert the stories on your audio recordings into text transcripts (if you have decided to do that). But this time (assuming that you have already entered your story form into NF):

1. Create a story collection (**Collection > Start story collection**).
2. Enter your transcribed stories (these and the previous ones) on the page **Collection > Enter or import stories**. After you paste each story into the large text box for it, answer the questions about the story and about the person who told it.
3. If you make a mistake or want to change something later, you can (carefully) edit your stories on the **Collection > Review incoming stories** page.

4c. Invite people to take your survey

Either before or after your group interview, prepare an email or other communication that invites people to take your online survey. Then send it out.

If you don't have time

You do not have to gather stories using a survey. But if you are pressed for time, this method of gathering stories will probably be more attractive to you than any of the other methods.

Stretch challenges

Here are some ideas that might make your survey work better for you.

- Make sure your introduction is pitch-perfect and gives people all the information they need to participate (see the section in *WWS-S* on surveying, in the chapter on story collection).
- Consider adding a video introduction to your survey. Use your powers of persuasion and your position in the community or organization to sell the project to potential participants.
- Test your survey with some participants (from each group) before you invite everyone to take it. Watch their reactions carefully. Look for confusion, offense, fear, interest, curiosity, enthusiasm, gratitude. Ask people what they think would make the survey better.
- Consider making use of networks within your community or organization to invite people to take your survey. For example, you might ask people who have taken the survey to tell other people about it. Or you might ask some leaders to help you find people who might be willing to pitch in and spread the word.
- Consider helping people to participate with a small gift like a voucher for a coffee shop. Do not frame the gift as payment for a story, because that will change the stories people tell. And don't make the gift too large, because people will think you are paying them to say what you want to hear. Find a gift that seems polite and friendly, then say something like "Thank you for being part of this project. Here is a token of our appreciation." You can read more about participation gifts in *WWS-S* (search for "How

to help people participate") or in *WWS* (search for "How to help participants find time to participate").

Part 4A: Catalysis I

4A-a. Facilitate a group story-sharing session

Before the session

Schedule the session. Ask 3-15 project participants to join you for a 60-90 minute group session. Find people who know the topic and are willing and able to *talk to each other* about it. (They will not be talking to you! You will be on the sidelines.) You can meet **in person or online**.

Plan your recording scheme. In an interview, you can record stories by taking notes. In a lively group session, however, this is nearly impossible. Stories can fly thick and fast in a lively group. For this reason, **group sessions should be recorded** if at all possible. If you really can't record a session, enlist the help of multiple note-takers, so you can at least spread out the task of keeping up.

If you will have six or more people in your session, make a plan to **record the stories in each small group**.

- If you will be meeting person, you can use a few burner phones or small digital recorders you distribute around the room.
- If you will be meeting online, you can:
  - Ask helpers (or participants) to make local copies of breakout-room recordings and send them to you.
  - Use multiple online accounts for your breakout rooms.
  - Spread out your sessions so that no session has more than 3 or 4 people in it (thus you will need only one group at a time and can record the main session).

Choose an exercise. Look through the exercises in the "Story-sharing exercises" readings for Part 4. Choose an exercise that works for you, your topic, and your participants.

Adapt the exercise to your needs. If you want to rewrite the exercise you chose in language that works better for you, go ahead and do that. You might want to add more time to some parts of the exercise or remove details that don't apply to your situation. For example, if you are sure that you will only have one group, you can remove all of the "small groups" instructions. Prepare a plan that works for you.

Prepare your materials. If the exercise you chose has any physical materials to it, or if it requires any online preparation (for example, a diagram on a whiteboard), get that ready now.

Prepare your story form. Use the same story form as you used in your interviews. Prepare paper copies or an online survey.

Prepare your introduction. You can use the same introduction as you prepared for your individual and group interviews. There is no need to mention the name of the exercise. Just say something like, "We are going to talk about your experiences with ___."

During the session

Start with the introduction you prepared. Then begin the exercise, using your (possibly modified) exercise agenda.

Keep the pace. When there is a quick task to complete, don't dawdle, and don't let people dawdle. Get it done fast. When there is a larger block of time, give people a ten-minute warning and a two-minute warning.

Disappear. Once the stories start flowing, fade into the background as much as you can. Don't tell stories, and don't ask questions. Let your participants do the talking. If things are going *very* wrong – say one person is taking over the whole conversation – you may have to intervene. But do it gently. For example, everyone should get a chance to share at least one story. But if you try *too* hard to enforce that rule, you could end up with nothing but superficial stories.

Ask people to give each story a name, just as you did in the group interview. If you have multiple small groups, ask each small group to choose one person to **take on the role of story namer.** That person should make sure that each story gets a name and that a running list of names is kept on a whiteboard or notepad.

Pause to fill in story forms. In each story-sharing exercise there is a **5-minute pause** in which people can answer questions about the stories they told. Have your story forms ready for that moment. Ask your story namers to give or show each person their story names. Make sure everyone can see that everyone else is doing this.

After the session

Check your stories. If they are in the form of notes, go back and see if there is anything you want to add to them. If you made an audio recording, check it now. If something went wrong, the stories are still fresh in your mind, and you can capture some notes about them.

In NF, go to **Collection > Enter story collection session records** and answer the questions there.

If you don't have time

Of the four story-gathering methods covered in this course, **this one is the most important** for building your PNI practice. That's because:

- this is the most **useful** way to collect useful stories for sensemaking
- this is the most **difficult** way to gather stories
- you are least **likely** to have experienced this method of story collection before

So if you can only afford the time to practice one story collection method, unless you have facilitated story-sharing sessions before, I suggest putting your time into this one.

If you want to do more in this part of the project – and if you can get enough participation to support it – challenge yourself to **try out every story-sharing exercise** described in *Working with Stories Simplified*: twice-told stories, timeline, landscape, ground truthing, and local folk tales. You can even print out the Narratopia game and use it to gather some stories for your project.

And you can go beyond *Working with Stories Simplified.* **Look on the internet for story-sharing exercises** and try using some of those as well. For example, some well-known ice-breaker games can work to gather stories. For example:

- two truths and a lie (tell about two true experiences and include one tall tale)
- never have I ever (follow up each declaration with a related story about something that did happen)
- experience bingo (create bingo cards listing experiences people might have had, call out locations, and ask for volunteers to tell about experiences that fit into those locations)
- ten things we have in common (three experiences we have had in common)
- ten superpowers we have (three times when we had superpowers – or wished we did)

Just make sure that the ice-breaker exercises you try out do not ask people to perform, compete, or make fun of each other, especially if your project topic is sensitive. Depending on what you are asking people to talk about, fun and games might or might not be appropriate.

Finally, you can challenge yourself to **build your own story-sharing exercise**. Go to *Working with Stories* (not the *Simplified* version), to Chapter 9 (Group Exercises for Story Collection), and read the section called "Build Your Own Story Collection Exercise." Do what it says there. Draw on your own creativity to build something that works for you and your project.

4A-b. Transcribe stories

As you did for your interviews, convert your audio recordings into text transcripts, then enter your stories into NarraFirma.

4A-c. Promote your online survey

Send a follow-up reminder to everyone who was invited to take your survey and has not yet responded. Include in it a few brief **inviting excerpts** from stories you have collected so far. Not whole stories! That might be off-putting. Just a few well-chosen sentences or phrases.

To find inviting excerpts, read through the stories you have collected. Look for nuggets that convey a spirit of energy, a sense of "something happening" in the project. Find points of action, turning points, and expressions of emotion. Look for excerpts that show potential participants that **people are recounting real experiences** here. Some of those experiences will be bound to resonate with the experiences other people have had. And be sure to provide both positive and negative excerpts, so people can see that participants are free to choose what they will say.

These are some (made-up) excerpts that I'd consider using to invite more people to participate.

- That's one of the things I like about this place.
- And he's like, you don't understand our customers.
- She was exhausted, I'm sure! But happy.
- It would have been great. But they killed it.
- I definitely learned a lesson that day.
- All that work was worth it to hear him say that.

Notice how these excerpts give a *hint* of some of the events people are recounting, but don't provide details. Such careful selections demonstrate discretion and respect for privacy. Also notice how some of the excerpts are **evaluation statements**, bits of commentary people add to their stories to convey meaning and significance. The overall message of an invitation like this is: we are listening to people with respect, and we will listen to you with respect too. I have found that this sort of demonstration helps people step over the barrier to participation more than anything else you can show them.

On the other hand, excerpts aren't magic. You might need to do more than just hone your message. You might need to reach out to potential participants in other ways. Call people on the phone or send out text messages. Scatter some paper copies of your survey form around in a place where people meet, like a bus station or library or cafeteria or break room. Or go to one of those places yourself and see if you can get some impromptu interviews or story-sharing sessions going. Keep gathering stories until you get the number you need.

If you have tried everything and you still can't get to 100 stories, don't worry. You can probably find some useful patterns with 80 stories, and you might even find some useful patterns with 60 stories. I set the minimum number of stories for this course project at 100 because I wanted you to be certain to find some patterns you can use in sensemaking. But if you can't get to 100 stories, you can still move forward with your project. You just might end up with fewer useful patterns to explore, like maybe 4-6 remarkable patterns instead of 8-10.

If you don't have time

If you have lots of stories coming in, or if you are gathering lots of stories in other ways, you may not need to do any extra promotion of your survey.

Stretch challenges

Even if you have lots of stories coming in, you might want to promote your survey with the use of selected excerpts anyway, just to practice the process. After all, your next project might not have as much energy for participation as this one does. Also, you *can* collect more than 100 stories in your course project. That's a minimum, not a maximum.

Reflect on this project phase (optional)

In NF, answer the questions in **Collection > Reflect on the collection phase**.

Part 4B: Catalysis II

4B-a. Check your data integrity

Begin by transferring all of the stories and answers to questions you collected into one format.

In NF, go to **Collection > Enter or import stories** to add any stories collected outside of NF into the system, either one at a time or by importing a CSV spreadsheet file.

Next, **compare answer counts** in your different formats to make sure that you have not lost or garbled any data during your entry or import process. For example, say you took notes on paper during your interviews, and in your notes it says that 24 people said they felt "happy" about their stories. But in the stories marked "interview" in your data set, you have only 21 "happy" entries. See where the missing happiness went. That sort of thing.

Finally, look at the first-level patterns in your data (bar graphs and histograms). Consider the **common data integrity issues** you went over in your sandbox session, plus those described in your course readings. If you find that any of those issues match your data, use what you have learned to resolve the issues.

If you don't have time

Checking data integrity is not optional. Everything else in catalysis rests upon it. Spend the time to get this right.

Stretch challenges

There isn't much extra you can do here. If you have checked that your data accurately represents what people said, you've done this step right, and you can move on to the next part of catalysis.

4B-b. Create and answer qualitative annotation questions

Read through your stories. When you notice a pattern, make a note of it. When you are finished, look through your notes to see what sorts of annotation questions might be useful to your project. Also consider these commonly useful annotation questions:

- **Scope:** How many people were mentioned in this story?
- **Facts**: What official or unofficial roles, rules, locations, or groups were mentioned?
- **Emotions**: How emotional were the word choices in this story? Or, what was its emotional tone?
- **Formality**: How formal or informal was the wording of this story?
- **Content**: Was this a recounting of events? Or was it a scenario, situation, fact, or opinion?
- **Narrative form**: Who was the protagonist of this story? What was their goal? Who or what helped and hindered them? What was the story's setting? What unwritten rules are apparent in it? What caused the central tension or conflict in the story? How was it resolved? What is the story's overall message or theme?

- **Narrative function**: What dilemmas, mysteries, discoveries, learnings, or solutions are apparent in this story? If it was used to teach, on what subjects would it be instructive?
- **Narrative phenomenon**: Judging from what they said, why did this storyteller tell this story? To inform, explain, blame, defend, instruct, reminisce, promote, persuade, or entertain? Where did the story come from? Was it a first-person experience, a second-person relating, a rumor, or just something everyone knows?

Choose at least one annotation question to answer. In NF, go to **Catalysis > Write annotation questions** and create your questions. (The templates you can copy on that page might also be helpful to you.)

Then page forward to **Catalysis > Annotate stories** to answer the questions for each story.

If you want to, you can **theme your stories** using the instructions in the Catalysis short readings. Add themes to each story as answers to a "Theme" annotation (single choice) question.

If you don't have time

You can skip this part of the course. If you are pressed for time or just not interested, you can drop it out entirely. It will not do any positive harm to your learning or your project. Annotating stories by answering qualitative-analysis questions is a useful skill, and doing so could turn out to be useful in your project. But it's not a must-have. You can put off practicing this aspect of catalysis until your next project.

Stretch challenges

If you want to challenge yourself with this activity (especially if you have done this kind of work before and find it easy), here are some suggestions.

- **Go question shopping**. Go to *Working with Stories in Depth* (which may still be called *More Work with Stories*) and find the section called "The story fundamentals questions expanded." That section describes (in more detail than you could possibly want) sixty questions you could ask about a story. Go shopping there for more questions you could use to annotate your stories. You can also find good questions in many good books about stories and how they work; see especially the medium-length and long course readings.
- **Let your annotation questions emerge** from the stories themselves. Read through the stories, letting them flow over you. Every time you read a story, then another, and think "well, that's an interesting similarity" or "that's an interesting difference," think of a question that might capture that similarity or difference. Keep growing your list of possible questions as you read. Check them frequently to see if they still seem worth asking. At some point you will feel like some of the questions on your list are more solid than others, in terms of their potential for generating useful patterns. Mark those questions in some way. Eventually you will know which questions you want to use.
- **Try some experimental questions.** If you have the time and inclination, try answering some questions that seem interesting but that might or might not work for the stories you have collected. It does not take that long to answer a question about 100 stories, especially if you have read through the collection so many times that you can remember

each story with a glance. Give yourself permission to satisfy your curiosity about what will happen if you ask all the questions you would like to ask. Questions that don't work can be easily ignored later on.

- **Don't answer your annotation questions yourself**. Ask some of your project participants to do it. You can divide up the task among any participants who are willing to volunteer for it, or you can have multiple people answer the same questions about the same stories, then use the most common answers. This elaboration is especially useful when your participants don't trust you, because it means that the annotation questions that contribute to the patterns you produce do not represent an insertion of your own bias. For a particularly sensitive project, you might even want to set up an **oversight group** of participants who are willing to help you make sure that every pattern used in sensemaking comes from the people, not from an expert. In most projects this is not necessary, but in some it could make the difference between success and failure.

4B-c. Mark remarkable patterns

When you are satisfied that:

- You have all of your data in one place
- It is correct
- You do not want to add any more data

It is time to review the patterns you have and choose those you will put more work into.

In NF, go to **Catalysis > Start catalysis report** and create a new report, choosing the story collection where you put your stories. Then go back and forth between **Catalysis > Configure catalysis report** and **Catalysis > Explore patterns**, reviewing all of the first, second, and third-level patterns NF has generated for you.

Once you have become familiar with your patterns, start choosing which of them you want to continue to work with by marking them as remarkable.

In NF, on the **Catalysis > Explore patterns** page, click the **yes** button under the pattern image where it says "Is this pattern remarkable?" Do this for **at least 8-10 patterns** (20 is better).

If you don't have time

If you want to include catalysis in your project, **you can't skip this step**. Without choosing some patterns to explore in sensemaking, you will not be able to prepare catalytic materials. Also, the rest of the catalysis process depends on what you do in this step. Budget some time to choose your patterns carefully, even if you have to take some time away from the next steps of the catalysis process.

There are ways to reduce how much time it takes to go through the patterns generated by your data. Look at the sections on "Scoping your explorations" in the short and medium-length course readings to get some hints on how you can shorten the time you need to carry out this task.

And remember this: **lumping is your friend**. If you asked questions with single- or multiple-choice answer lists, you are likely to find that some answers were not often chosen. Lumping together similar answers with low counts reduces the number of patterns you need to look at and improves the strength of the remaining patterns. Be careful not to distort what people said! But if you can find one, a good lumping scheme can cut your catalysis time in half. Search in your readings for "lumping" to find advice on this topic.

One more thing: reviewing patterns **starts out slow and speeds up later**. At first you may look at your hundreds or thousands of graphs and think you'll never get through them all. But don't worry. Your pace will pick up as you go. If it doesn't, go back to the "Scoping your explorations" sections in the course readings and learn how you can reduce your load.

Stretch challenges

Reviewing patterns in catalysis is one of those tasks that **expands to exceed the time available** to it. In some of the larger projects I have worked on, I have spent dozens of hours reviewing tens of thousands of graphs, searching for useful patterns, and in each case I could easily have spent double or triple the time I spent without coming to the end of what was possible.

So you don't have to stretch yourself to do this part of your project. It will stretch itself for you. To the extent that you can let that stretching happen naturally, let it happen. Do your best to be patient and careful in this step, because **you are choosing the patterns your participants will see**. In the transformation from analysis to catalysis, the selection of remarkable patterns is one of the few remaining places in which your own biased opinion can distort what people said.

So if you want to be extra careful in this step, put some extra attention into **establishing firm rules** to guide your selection of patterns and **documenting your process** so people can see exactly why and how you chose the patterns you chose. Look over your course readings on catalysis principles and bias-reducing rules for help doing this right.

Another thing you might want to do to maximize your learning in this step (and maybe speed up your process) is to make sure that you fully **understand the graphs and statistical test results** you have generated. If you don't already know how to interpret basic statistical tests (or maybe it has been a while), you might want to look over some of the long course readings on the topic.

You might be wondering why I have not recommended that you improve your project (and reduce the effect of your bias) by asking your participants to help you select remarkable patterns. Sadly, you are not likely to find any volunteers to help you do this. I mean, you can *ask*, but in my experience, **nobody wants to do this**. Personally, I find this sort of thing fascinating. I could look at graphs and statistical test results all day. I love it when I get a nice fresh batch of patterns to poke around in, and the more the better. But the great majority of people don't like doing this sort of work and won't sign up for it.

4B-d. Write at least one observation

In NF, on the **Catalysis > Explore patterns** page, for at least one of the patterns you have already marked as remarkable, fill in the box under where it says "Enter an observation for this pattern here." Give the observation a short name and a relative strength.

If you don't have time

I wanted you to write your first observation in this part of the course in case you need to ask for help from your fellow students. If you understand what you need to do here and don't think you will need any help, **you can skip this activity** and write all of your observations in the next part of the course.

Stretch challenges

The best way to get the most out of this activity, I think, is not to write lots of observations but to **practice exploring patterns in detail**. Look in the catalysis parts of your readings for sections that cover exploring remarkable patterns and writing observations.

4B-e. Strengthen your patterns

If you have not been able to find 8-10 remarkable patterns in your data set, do what you can to bolster your data. Gather more stories; ask more questions; answer more questions yourself; improve your lumping schemes. Look in your course readings for advice on what to do when you find few or weak patterns in your data.

If you don't have time

If you have not found at least 8-10 remarkable patterns and you don't have time to strengthen them, your options depend on how many remarkable patterns you did find.

- If you found **at least three** remarkable patterns, you can still finish the catalysis process, and you can still use the patterns you found in sensemaking. Your support for sensemaking will be weaker than it could have been, but you will still get to practice building catalytic materials, and that's worth something. You will need to inform your participants that the patterns they will be working with are even more tentative than is usual for this kind of work, but otherwise you will be able to proceed as planned.
- If you found **two or fewer** remarkable patterns, it would be best not to use any catalytic materials in your sensemaking workshops. Catalysis is an optional part of PNI, after all. You can carry out a perfectly successful project without it. If this is the case, you can skip the rest of the catalysis activities (except for preparing your story cards). Then, every time a sensemaking activity calls for you to facilitate a "pattern-focused" exercise, skip the drawing-out-stories step and ask people to work with all of the stories you collected.

Stretch challenges

If you're interested in learning more about catalysis, you could work on strengthening your patterns even if you have found plenty of remarkable patterns to work with.

Use your curiosity to help you find avenues to explore. Maybe you found some weak spots in your story collection – fewer stories from one participant group, for example – that you could improve on with a little extra effort. Or maybe you thought of an annotation question that might offer an additional insight.

Just remember that when you add more data to your collection, some of your existing patterns could change, so you might have to go back over them to check which patterns are (still, or newly) remarkable.

Part 5: Sensemaking I

5a. Write observations

Write an objective observation for every remarkable pattern. In NF, on the **Catalysis > Explore patterns** page, select the pattern, scroll down past its image and past its observation, then click the Add button to create new interpretations.

If you don't have time

Writing observations can be done very quickly. Just write what you see. Keep it simple: "Of the 72 stories in which X, 28 people said Y and 44 said Z." It can be that short. If you don't delve into any details, you can probably get through writing observations for 8-10 patterns in half an hour.

Stretch challenges

If you want to get the most out of this activity, spend some serious time exploring every remarkable pattern you found. For each pattern, read and compare at least two subsets of stories. Look through this list to see if you notice any differences in:

- Narrative form:
    - Settings (Where did the stories take place? When?)
    - Assumptions (What sorts of unwritten rules were in place?)
    - Behaviors (What were the characters like?)
    - Emotions (What feelings did the characters express?)
    - Relationships (How did the characters connect to each other?)
    - Plots (What sorts of events took place?)
    - Resolutions (How did the stories end?)
    - Morals (What messages were conveyed?)
- Narrative function:
    - Subjects (What topics were touched upon?)
    - Lessons (What did characters learn?)
    - Dilemmas (What choices did characters face?)
    - Challenges (What obstacles stood in the way?)
    - Resources (What did characters draw upon?)
    - Discoveries (What were the aha moments?)

- Connections (What other stories were referenced?)
- Narrative phenomenon:
  - Negotiation (How did the storytellings begin? How were they adjusted?)
  - Confidence (Were the storytellings timid or self-assured?)
  - Mood (Were events framed in positive or negative ways?)
  - Evaluation (What sorts of meta-commentaries were added?)
  - Word choices (Did any particular phrases come up often?)
  - Activity/passivity (Did characters do things, or were things done?)
  - Reception (How did audiences respond?)
  - Familiarity (Did the stories seem well known to the audiences?)

You can do a sort of **mini qualitative analysis** like this on two or three subsets of stories related to each pattern. When you think you have found all there is to find for that pattern, describe what you discovered as objectively as you can, providing evidence (such as excerpts) to back up your claims. Make sure that anyone would be able to see and agree with what you describe.

5b. Write interpretations

After you have written an observation for every remarkable pattern, write **two or more competing interpretations** for each observation. Use the instructions on the "Writing interpretations" page in the Catalysis short readings.

Finally, go back to each interpretation and add any **extras** (like ideas or questions) you think might be helpful.

Note that these activities separate the steps of writing observations and writing interpretations, but it is normal to **keep moving back and forth** between the two steps. For example, you might find yourself pausing while writing an interpretation because you have suddenly realized that a pattern you marked as unremarkable now seems remarkable. **You are building a portrait of what people said**. Like a painter who keeps going back and touching up every little part of their painting, you can keep refining every little part of your catalysis materials right up until you use them in a sensemaking session (and maybe afterward).

If you don't have time

You cannot skip this activity. If you can't find the time to write competing interpretations for each observation, you should not use your observations in sensemaking at all. (And that would be fine. You do not have to use catalytic material in sensemaking.)

If you are curious about why this activity is so important, read this aside.

> It *seems* like it should be possible to use observations in a sensemaking session without any interpretations. It seems like you should be able to ask your participants to simply talk about what they see. Why go to all this trouble? Why not just talk about the facts?
>
> Because **PNI projects are almost never about facts**. They are about values, beliefs, feelings, hopes, fears, dreams. To work productively on such things, people need more than facts. They need to explore what the stories and patterns *mean*. And on that, opinions will vary.

Consider the story of the four blind people who encountered an elephant. Every one of them felt a part of the elephant (the trunk, the legs, the ears, the side) and became convinced that they understood the whole thing. It was only when the people learned about the *other* ways in which the elephant had been experienced that they understood what it truly was.

Asking people to work with naked factual observations is like asking the four blind people in the story what animal they have come across. Every participant in your sensemaking sessions will show up with their own assumptions, and those assumptions will be invisible. Giving people competing interpretations **makes the invisible visible**. This will help your participants explore the meanings in your stories and patterns more deeply than they can on their own.

Why can't you just ask your participants to interpret your observations during the sensemaking session? Because **writing interpretations requires care and diligence**. It requires that the writer examine their actual beliefs about what each pattern means and place them side by side with foreign (and sometimes unpalatable) alternatives. This is not something most people can easily do, and it's even harder to pull off in the pressure cooker of a group sensemaking session.

You can, however, ask your participants to interpret your observations in a **group catalysis session**. In fact, if you can pull that off, it's even better for your project than writing the interpretations yourself. However, it can be difficult to find people who are willing and able to go through such a challenging process. If you don't have time to write the interpretations yourself, you probably won't have time to do that either.

Stretch challenges

If you want to learn the most you can about writing competing interpretations, write them in both of the ways they can be written.

1. Write a set of interpretations yourself, as described in this activity. Be sure to expand each interpretation with ideas to discuss and questions to ponder.
2. Plan, recruit volunteers for, and facilitate a group catalysis session. In the session, help a group of your practitioners to do what you did. Ask them to improve upon and add to the interpretations you wrote. To prepare for the session, read through the course readings on the process of writing interpretations. Use them to help your volunteers understand why the process is useful and what you need them to do to make it work. When the session is over, use its results to improve your catalytic materials.

5c. Cluster your observations or interpretations

When you feel that you have captured everything your data have to say in a way that will help your participants make sense of your topic, it is time to start drawing together what you have created into a coherent package.

First, choose whether you want to cluster by observations or interpretations. Look at the section called "Clustering catalytic material" in the Catalysis short readings to make your decision.

In NF, go to the **Catalysis > Cluster interpretations and/or observations** page and follow the instructions there.

A quick note about cluster names. If you think your participants are likely to be defensive, insecure, or apathetic, **draw your cluster names verbatim from your stories**. Find "lightning bolt" phrases that seem to capture the energy of the topic, and bring them right up to the surface. Doing this gets people's attention and challenges them to explore what you have prepared. Don't offend people! But do look for places where meaning seems to have coalesced into powerful words.

If you don't have time

You can't print a catalysis report from NarraFirma without clustering something, because the clusters form the structure of the catalysis report. But you can complete this task in ten minutes if you need to.

Stretch challenges

This is a pretty simple activity; there's not a lot to learn about it.

5d. Prepare your catalytic material

In the Catalysis short readings, look for the section called "Getting ready for sensemaking." Think about the questions and suggestions in that section in relation to your project and participants.

In NF, go to the **Catalysis > Print catalysis report** page and generate an HTML copy of your materials. You can use the report exactly as it is, but some people like to pretty it up. To do that you have three options:

1. Copy and paste the report into your favorite word processor. Some word processors pick up HTML pretty well; others don't. (You may also need to play with some of the advanced printing options in NF.)
2. Run the HTML file through software that converts it to whatever format you want to use. I recommend **pandoc** (https://pandoc.org).
3. Print the HTML file to a PDF file, then use software that converts PDF files to whatever format you want to use.

If you don't have time

If you used NarraFirma to do all of the other catalysis steps, this step should take you about two minutes to complete. You can print off the resulting HTML file exactly as it is. It's not the most beautiful thing in the world, but it works.

It's not necessary, but you might want spend some time making your catalysis materials look good. You want your participants to feel privileged to be part of the project. It sends a sign of respect and appreciation when you prepare beautiful things for them to use. Just be careful not to introduce any distortions into the material as you do this, for example by making some stories or patterns or interpretations seem more important than others.

5e. Prepare your story cards

The last thing you need to do before your first sensemaking session is to get your story cards ready for your participants to use.

In NF, go to the **Sensemaking > Print story cards** page. Choose from the options there, then click **Print story cards**. As with the catalysis report, you can use these exactly as they come out of NF; you can copy them from your browser and paste them into a word processor; or you can convert them from HTML to another format.

If you don't have time

If you entered your stories into NarraFirma, this step takes one minute.

Stretch challenges

If you want to, you can pretty up your story cards somewhat, but be careful. Making the stories look too nice can make them seem changed (or worse, faked). Make sure it's obvious that **this is exactly what people said**, not some fancified version of it.

Reflect on this project phase (optional)

In NF, answer the questions in **Catalysis > Reflect on the catalysis phase**.

Part 6: Sensemaking II

6a. Facilitate a contact-only sensemaking session

When you dump a lot of stories in front of people without any instructions as to what to do with them, most people don't think about what the stories mean. What they do is read the stories, one after another, and accept or reject each one: this story makes sense, this story relates to me, this story sounds right, this story doesn't. The stories go into two bins: **good stories and bad stories**. That's not surprising, because one of the functions of stories is to judge accountability. And it is useful to do that! But it's useful in a very simple way.

Your goal is to help people go beyond such simple judgements to the **deeper exploration of meaning** in the entire body of stories you have collected. So you need to give them something to do that goes beyond binary judgement. The contact tasks I have described in this course help people do that. The more complex sensemaking exercises that you will use later on (landscape,

timeline, and so on) delve even more deeply into the meanings in the stories. But let's start with a task that is still relatively simple.

Before the session

Choose a story contact task. Look through the exercises in the short readings and choose a simple task (sorting, ranking, clustering, or pairing). Which task seems like it will be the most useful for your project and the most interesting to your participants? You will have more opportunities to use contact tasks later, so if you can't decide which task to use, use one now and another later.

Plan your session agenda. Every sensemaking session has four parts: the introduction, the main portion (including any contact tasks and exercises), the wrap-up, and the after-party. Think about how much time you want to allocate to each part.

1. Your **introduction** should be brief and simple.
2. Next come your **contact tasks and exercises**, however long they will take. In this case, they will be:
   a. A story-contact task (sorting, ranking, clustering, or pairing)
   b. A short break to switch gears
   c. A simple pattern-contact task (see the section "Sensemaking with patterns: contact" in the short readings)
3. To **wrap things up**, prepare a few categories of things you would like people to list, like surprises, discoveries, insights, and so on. Make sure you have a place to write down these things (a place everyone can see) as people call them out.
4. Be ready to launch the **after-party** with a simple reflective question like "So what was that like for you?"

Note that **the story-contact task *must* precede the patterns-contact task**. Why? Because if you do it the other way around, people won't understand where the numbers in the patterns came from. After people soak up some stories, the patterns will start to make sense.

If you can't get people to commit to the time period you will need for your session, start with your ideal agenda, then **trim down parts** here and there, stopping when you cringe at what is likely to happen in so little time. If every part has been trimmed as far as it will go and you're still way over, drop a whole section of your plan. It is better to simplify an over-packed agenda than to try to rush through it.

No matter how much slack there is in your agenda, it is always useful to **create a time-crunch plan**. Mark a few parts of the agenda as **especially shrinkable** if you are running late. Like a crumple zone in a car, such markings can protect the most important parts of the session.

Once you have figured out how you are going to allocate your time, write up an agenda you can take with you to the session. If you want to, in NF, go to the **Sensemaking > Plan sensemaking sessions** page and write out your session agenda there. You don't have to write down every tiny detail of your plan! But making the plan will help you work it out.

Practice your introduction. The introduction you give in your sensemaking sessions should be somewhat like the one you used in your interviews. However, since people will be working with

stories rather than telling them, it should also be different. For one thing, you can go ahead and say the word "story" right away, because people will have example stories right in front of them. As before, **keep your introduction brief**, a few minutes at most. Don't deliver a lecture on sensemaking or stories or anything else. Just give people a quick idea of what is going to happen, then start them on their first task.

Practice the introductions to each task. As you introduce each task, set expectations carefully. Don't say things like, "Stay with me here, this is about to get complicated" – even if it is – because what people will hear is "You can't do this." They *can* do this. The sensemaking exercises in PNI are no more complicated than most board games. To convey the (relative) simplicity of the task, practice saying things like, "Okay, so this is how this works" or "Here's how to do this" or "Here's the game plan."

Get your catalysis materials and story cards ready. See the section called "Setting up small groups" in the Sensemaking short readings to decide how many small groups you want to support. Then decide how many sets of cards and materials you will need (one per group, or one poster-sized set on the walls, or one storyteller per group).

A special note on timing and story volume

Depending on how many stories you collected, it may be impossible for every participant in your sensemaking sessions to absorb (read or listen to) every story. But people often want to do exactly that. The resulting conflict can throw a wrench into the best sensemaking plans.

The antidote to this problem is to plan in advance **how many stories you will ask people to absorb** based on:

- how much time you can give to the story-contact task
- how long your stories are, on average
- how fast you think people will be able to absorb the stories

If you can't let every participant read every story, **give them a way to access the stories later**. This can range from a public web site to contact information they can use to request a copy of the stories. Be careful not to give the impression that you are *forbidding* people access to the stories. Make it clear that this is a *time* constraint, not a form of control.

It is also fine to **trim down very long stories** to fit into the time better. Just make a note that you have done this and give people a way to access each unabridged story if they want to (on the spot or later on).

During the session

Start with the introduction you prepared. Then begin your contact task(s) or exercise(s), using your agenda.

Start recording. You don't need to make transcripts in a sensemaking session, but you might want to record the session anyway. An audio recording can help you look back and reflect on what happened later on. And if you intend to write a project report (maybe for your funders), a transcript could help you capture some of the key moments in the session – when a group discovered an insight, for example – and provide some useful verbatim quotes.

Introduce the project, topic, and stories. Give a quick hint of the planned tasks and/or exercises, then get started with your first task.

Let it flow. Sensemaking exercises, including contact tasks, are basically games. Set up the rules, give people their gaming materials, and let them go.

Watch for snags. Fade into the background, but watch what is going on and be ready to help or intervene if necessary.

Manage the transitions. No matter what sorts of tasks and exercises you have in your agenda, pay special attention to the moment that comes just after one ends and before the next one starts. People sometimes lose interest or become annoyed when you ask them to switch from one task to another. They might not want to stop doing the first task; they might be tired; or they might feel like you are asking too much of them. It helps to give people a break between the two tasks to re-energize, and it helps to (briefly) explain *why* you are asking them to move on to a new task.

Watch your time. Give people ten-minute and two-minute warnings. If things start falling behind, shrink some of your previously-prepared shrinkable parts.

After the session

In NF, go to the **Sensemaking > Enter sensemaking session records** page and write your notes on the session there.

If you don't have time

I set up the sensemaking portion of this course to ideally provide you with **three increasingly ambitious sensemaking plans**. You do not need to follow that sequence to succeed in the course. If you are having a hard time getting enough stories, or your catalysis process is going slowly, or you can't get people to sign up for (or show up for) your sensemaking sessions, don't worry. You can hold two sensemaking sessions, or just one, in this part of the course, and you will still learn a lot.

Stretch challenges

If you are nervous about facilitating your first sensemaking session, rehearse it. **Do the contact exercises** you have chosen, all by yourself. Sort your stories, rank them, cluster them, or pair them up with stories from your own experience. Then try out your patterns-contact task: choose an observation or interpretation; use it to choose some stories to read; think about what you see. The better you understand what people will be doing in your session, the better you will be able to help them do it.

What else can you do to get more out of this activity? You can hold more than one contact-only session: one per participant group, one per sub-topic, one per day of the week. And you can try out all of the story-contact exercises, or slot in some exercises that aren't covered in this course: ones you find on the internet and ones you come up with yourself.

Here's what to look for in a story-contact exercise.

- A good story-contact exercise helps people **approach** the collected stories gently and with respect in an open and listening exploration rather than a closed and critical evaluation.
- A good story-contact exercise helps people **explore** and discuss the collected stories in a quiet, safe, face-saving way that does not challenge them or put them on the spot.
- A good story-contact exercise helps people **connect** the collected stories to their own experiences and perspectives, either by arranging the collected stories into groupings that have meaning to them or by responding to the collected stories with stories of their own.

Evaluate any exercise you find or create by these criteria. When you are sure it meets them, try it out in practice. Then watch what happens.

You can also find other activities online that might work as a patterns-contact exercise, or come up with your own. Here's what to look for in a patterns-contact exercise.

- A good patterns-contact exercise is **enabling**. It gives people the agency to explore patterns that are interesting *to them*. It does not ask people to prove that the patterns they choose to explore are noteworthy for some external reason.
- A good patterns-contact exercise is **straightforward**. It does not intimidate or exclude people by asking them to do more than a person with an average level of education or experience in the community or organization would be capable of.
- A good patterns-contact exercise is **relevant**. It does not ask people to sort among dusty, boring technical details that don't matter to them.

Remember: the sensemaking exercises I describe in this course were not received on tablets of stone. They originated and evolved in practice: in the course of carrying out real projects with real participants. As you build your own PNI practice – and your own flavor of PNI – you can change the exercises you see here, and you can build your own exercises. Look in *WWS*, in the chapter on sensemaking exercises, for a section called "Build Your Own Sensemaking Exercise."

Part 7: Sensemaking III

7a. Facilitate a full sensemaking session with an intermingled pattern-focused exercise

Do you remember what I said in the instructions for the previous activity: that people need a task to do when they encounter a collection of stories? The same thing is true of patterns. You can't just throw patterns in front of people. You need to **help people work with the patterns** you found, not just accept or reject them.

You already used a simple pattern-contact task in the previous activity. That was a baby step into pattern exploration. Now it's time to help your participants dive more deeply into the meanings behind the patterns.

All of the sensemaking exercises described in this course (landscape, timeline, story elements, etc.) can be done using your entire story collection. In fact, if you did not find any patterns during the catalysis phase of your project, this is how you should finish the course. Use the sensemaking exercises in this activity (and the next) across your entire story collection, disregarding all instructions to focus on particular patterns.

If you did find patterns during catalysis, however, you can use them to help your participants **focus on explorations that matter** to them. Here's how.

In the contact-only sensemaking session you facilitated in the previous activity, you asked people to choose an observation or interpretation to explore, then you asked them to read **subsets of stories** from the collection. Now you will ask them to do the same thing – but instead of simply talking about the stories in each subset, they will *use the stories in a sensemaking exercise*. In a sense, you will be helping people to **create a series of small projects** within the larger project, each mini-project focused on a single pattern of interest.

There are two ways to use a pattern-focused story exercise in a sensemaking session.

1. You can use an exercise that **intermingles** story subsets. Your participants will:
   a. Place their sticky notes into **one space**, distinguishing between the story subsets using color or shape or some other visual attribute.
   b. Look for overall patterns in the space, using the visual attribute as an additional dimension of meaning.
2. You can use an exercise that **juxtaposes** story subsets. Your participants will:
   a. Place their sticky notes into **two separate spaces**, one per subset of stories.
   b. Look for patterns within each space.
   c. Compare and contrast the different sets of patterns.

Because the intermingled method is easier to understand and facilitate, we will practice it first.

Before the session

Look at your catalytic material, and look at the story exercises described in the short readings (in the Sensemaking chapter). Choose an exercise that will help participants compare subsets of stories by placing them together into one space.

Not every exercise will work for this. The landscape, timeline, and local folk tales exercises will work, because when people are finished, they will be able to see the different origins (colors) of the sticky notes. But the story elements exercise won't work, because the original sticky-note colors will no longer be visible in the end result. (If you have an exercise in mind for this activity that is not listed in the readings for this course, make sure it supports intermingling.)

After you have chosen your story exercise, plan your session agenda, working out how you will place each span of time. Use the section called "Using material in sensemaking: Intermingling" in the short readings. Using NarraFirma, go to the **Sensemaking > Plan sensemaking sessions** page and write out your session agenda there. You don't have to write down every tiny detail of your plan! But making the plan will help you work it out.

A special note on asking people to pull out story subsets before an exercise

The time period when people are pulling out story subsets can be a **bottleneck**. Participants who are engaged with the topic, confident of their skills, and willing to put in some work can sail right through this part of the session. But problems can arise if any of those elements are missing. Use these tips to help you anticipate some common issues.

Reaction	What to say	If this seems likely
People who are used to giving (or getting!) orders may become annoyed that they are being asked to do "**clerical work**."	Explain the participatory element of the session. Explain that owning this task gives them the **freedom and power** to explore the aspects of the collected stories and data that they find most interesting and useful.	Make sure your catalytic materials and story cards look **professional** and attractive.
People with low confidence may balk at this task because they think they are **unqualified** or will do it wrong.	If you think this is likely, take a few extra minutes to explain the process of pulling out stories. Show people that it is **simple and easy**. Offer to provide help if necessary.	Make sure your catalytic materials and story cards are simple and **approachable**.
People who are apathetic about the topic or the session may find this task **boring** and may do it sloppily or incompletely. This will weaken the patterns they discover, proving that your approach is stupid and worthless.	Sell the effectiveness of the sensemaking process. Give them a **vision of future success** by describing a discovery you've seen in such an exercise (even if it's a discovery you came to by yourself in preparation for the session). Tell them that the more they put into the session the more they will get out of it.	Make sure your catalytic materials and story cards look powerful and **captivating**.

Whether or not any of these conditions apply, you can help people get past this potential bottleneck by helping them **share the task**. Pulling out stories is usually an objective task. For example, a group might be looking for stories about which people said they felt "encouraged" versus "discouraged." So groups can split up the task without biasing the result. If a group of four wants to pull out 20 stories, each person can pull out five.

Can you help groups use a computer to pull out subsets? Yes, but in a busy room with lots of people doing lots of things, this is hard to coordinate, and it may actually be slower than just asking people to do it themselves. (Still, the option can be useful when you have a very small session, say with only a few people.)

No matter what obstacles people face in pulling out stories, it is better to let this time period run long than it is to rush into the story exercise with too few stories to support the emergence

of useful patterns. If you think this part of the session will be a bottleneck, give it extra time, or create a contingency plan to shrink or jettison another part that comes later.

During the session

The instructions for running this session are mostly the same as for the previous one. Help your participants get started, then get out of their way, but be available to help if they get stuck.

After the session

In NF, go to the **Sensemaking > Enter sensemaking session records** page and write your notes on the session there.

If you don't have time

If the many moving parts of this activity seem overwhelming to you, **you can put off tackling a pattern-focused exercise** until the next part of the course. Instead:

1. Start with a story contact task.
2. Don't show your participants any patterns, even if you have them.
3. Facilitate a sensemaking exercise *using the entire story collection*.
4. End the session with the same wrap-up exercise and after-party you used before.

Once you have run a full sensemaking session with stories but without patterns, you can add the pattern-focused complication in the next part of the course.

Stretch challenges

I have been in sensemaking sessions that ran for three consecutive 8-hour workplace days, and I can confidently say that **no one has ever reached the upper limit** of what is possible in a sensemaking session. You can keep going with sensemaking for a very long time.

I can think of four ways to do more sensemaking than I have described in this course. (All of these expansions apply equally to this activity and to the next.)

1. Hold one session per **participant group**. Sometimes it is not possible, and sometimes it is not advisable, to hold one sensemaking session with everyone who wants to participate in your project. The different groups might not get along, or they might see things too differently to work together fruitfully. In that case you might want to hold separate sensemaking sessions for each participant group. Your project report (which should be made available to all participants) should include a record of what took place in each session.
2. Hold one session per **sub-topic**. During your project, you may find that your original topic has spread out into two or three or four sub-topics, each of which seems like it would reward attention during sensemaking. You could then hold a series of sensemaking sessions, each of which addresses a single sub-topic. The same people could come to all of the sessions (making the series a sort of seminar), or you could gather different participants for each. You don't need to use different exercises. You can just ask people to confine their explorations to one sub-topic at a time.

3. **Grow your catalytic materials** by combining your explorations with those of your participants. During sensemaking, have each group come back to the observation or interpretation they chose and add to it, using what they learned from the exercise they just experienced. But *don't just do this as an exercise*. Actually allow your participants to add to the catalytic materials you will bring to the next sensemaking session. If the people in the session are from one participant group, or are considering only one sub-topic, you can ask them to note that detail in the new materials they write. After four or five such sessions, you may find that your catalytic materials have transformed substantially from what you started with. And all of that building can go into your final report.
4. Build a **pyramid** of sensemaking. You can combine the previous three elaborations in a variety of sequences. For example:
   a. You could hold a sensemaking workshop with each participant group (or on each sub-topic), then follow up with a combined workshop that includes people from all groups (or covers all sub-topics) and draws on the outcomes from all previous workshops.
   b. You could ask people from each participant group to add to your catalytic materials separately, then assemble a combined group to consider all of the materials together.
   c. You could create a task force with a few representatives from each participant group. They could meet in a series of sub-topic workshops in which they improve on your original catalytic material until every task force member is satisfied that they have explored (and said) all they needed to explore (and say). Then you could hold a session for each participant group in which you ask them to work with the revised materials to make sense of things for their larger group. Finally, the task force could meet once more to take in what the larger groups had to say.

The most important thing to remember in scaling up sensemaking is the value of **nesting**. In the same way that a single story can contain many perspectives without forcing consensus among them, sensemaking need not end in a grand consensus, no matter how ambitious or multi-layered it is. You can **preserve intact the kaleidoscope of perspectives** you have discovered and explored within the story of your project, the stories your participants told and heard, the discussions they had, and the things they built.

Part 8: Intervention and Return

8a. Facilitate a full sensemaking session with a juxtaposed pattern-focused exercise

Now that you have practiced helping people use catalytic material to guide deep explorations of stories, you can add one more complication. You can use a story exercise that does not allow

participants to intermingle story subsets. To do this, you will ask your participants to carry out two entirely separate story exercises, then **compare the results**.

Look at your catalytic material, and look at the story exercises described in the Sensemaking short readings. **Choose any exercise that requires only one group**. (The "Twice-told stories" and "Composite stories" exercises require multiple groups.)

There are a few critical things to remember about this activity.

- You absolutely must have small groups with **at least four people** in them. This is because you are going to ask each small group to split into two even smaller groups.
- Groups can choose **only two story subsets** to work with, unless you have a group with 6 or more people, in which case they can split into 3 very-small groups.
- You must **keep groups apart** while they do the story exercise. If they are paying attention to each other, their results will leak into each other, and the comparison will be less than useful. If you are meeting physically, move the subgroups apart as far as you can, into separate rooms if possible. If you are meeting online, move them into separate breakout rooms (and don't let them share the same stack of whiteboards, because they will be tempted to peek).

After you have chosen your story exercise, start building your session agenda, working out how you will place each span of time. Use the section called "Using material in sensemaking: Juxtaposition" in the short readings.

When your agenda is ready, write it down as you did before.

If you don't have time

These last two sensemaking sessions are the heart of the course – and **the heart of PNI**. If you can't find the time (or the participation) to run all three sensemaking sessions, or even two, find a way to run at least one.

Stretch challenges

Please refer back to this section in the previous activity description for some general ideas on expanding sensemaking.

With regard to juxtaposed exercises specifically, a word of encouragement and caution. Helping people compare and contrast things they have built using stories is **the most difficult and the most fruitful use** of narrative sensemaking. In the same way that listening to stories helps us to see things through the eyes of other people, seeing how other people interpreted and understood stories and patterns helps us to see through their eyes even more deeply.

This advanced technique is especially useful when **differences among groups** are important to your project. For example, in a project that includes groups of people with different relationships to power – say managers and staff, or teachers and students, or politicians and citizens – you can use **parallel pattern-focused exercises** to help people get closer to understanding each other. It is also helpful when you have groups of people on either side of a cultural or ideological divide.

But be careful. Use this elaboration only *after* you have practiced facilitating a juxtaposed story exercise among groups that are not divided.

I once gave a talk called "Story Sharing as Mediation and Manipulation" (at the 2023 Stories without Borders conference). If you can, find that talk (or the slides for it) and think about how its exemplary and cautionary tales can help you design sensemaking workshops that are helpful and not harmful.

8b. Prepare to present an account of your project

You will have ten minutes of class time to tell everyone what happened in your project. You can do a little or as much with those ten minutes as you want to. Everyone will be listening with respectful curiosity to **the story of your project**:

- what you planned to do
- what you hoped would happen
- what did happen:
  - how the various activities went
  - what surprised you (and what didn't)
  - what challenges and opportunities arose
  - how the project turned out
  - what people said to you about the project
- what you learned:
  - about the topic of the project
  - about yourself (and your strengths and weaknesses)
  - about PNI (and its strengths and weaknesses)
  - about your own flavor of PNI
- what you would like to do next

You can use that list to plan your presentation. Or you can use it without preparation during the class. Just read each prompt aloud, then talk a little about it.

These are some other things you might want to show during your presentation:

- Things people built in your sensemaking sessions (timelines, landscapes, etc.)
- Wrap-up lists people filled in during sensemaking (discoveries, curiosities, etc.)
- Excerpts from some of the pivot, discovery, and voice stories you found in your sensemaking (what are those? see *WWS-S*, chapter 7 (Narrative Sensemaking), "Facilitating Convergence")
- Things people said about the project itself (expressions of gratitude, discomfort, distrust, confusion, revelation, etc.)

If you don't have time

You do not have to spend any time preparing to talk about your project. You can just show up at the last meeting and talk about what you remember. Building an actual presentation is an optional activity.

Stretch challenges

If you are serious about doing PNI, this activity is an excellent opportunity to **practice making the case for your flavor of PNI**. As you prepare to present your project, pretend that you need funding or permission to do the next project you want to do, and that your success in getting that funding or permission will hinge on how well you present your work in this project.

8c. Do some optional wrapping-up things

All of these activities are optional. You can choose to spend lots of time on them! But you don't have to. It's up to you.

Plan and carry out a narrative intervention

Look through the interventions described in the short readings. Choose one and do it, either fully or as an experimental prototype. Then, in NF, go to the **Intervention > Enter intervention records** page and write and write your notes on the session there.

Return stories to the community

In whatever way works for you, your project, and your participants, return the stories to the people who told them and to the community or organization to which they belong. Then, in NF, go to the **Return > Reflect on the return phase** page and answer the questions there. Also look at any of the other pages in that section to see if you want to use them.

Create a project report

Take all of your materials and combine them into some kind of report on the project as a whole. In NF, some of the pages in the **Return** section might be useful to you.

Reflect on the intervention and return phases of your project

In NF, answer the questions in **Intervention > Reflect on the intervention phase** and **Return > Reflect on the return phase**.

Reflect on this project phase

In NF, answer the questions in **Sensemaking > Reflect on the sensemaking phase**.

Reflect on the whole project

In NF, go to the **Return > Reflect on the project** page and answer the questions there.