Effective Educator Development TA CENTER

EED TA CENTER BRIEF

Sharing Your Story

Data Storytelling Toolkit

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This content was produced under U.S. Department of Education contract #9199022F0375. No official endorsement by the U.S. Department of Education should be inferred.

Introduction

Life happens in the narratives we tell one another. Data storytelling "acknowledges that stories are how we, as humans, often understand the world" (LaTurner & Morgan, 2022, p. 4). This toolkit offers a suite of tools and resources to help districts, schools, higher education institutions, and nonprofits develop and share data stories that move the audience to action.

Data storytellers seek to persuade and show meaning of data in a way that is accessible and compelling by

(1) engaging the audience's **heads** (through authentic messaging, photos, quotes, or testimonials),

(2) touching their **hearts** (through authentic messaging, photos, quotes, or testimonials), and

(3) activating their **hands** (with a clear call to action that results in next steps).

data noun

factual information used as a basis for reasoning, discussion, or calculation".

- Merriam Webster dictionary

These objective data can be collected observations or measurements, and often need a translator - or storyteller – to make the data accessible and compelling. That is where you come into the picture – pairing your own insights with those found in this brief.

Well-crafted data stories are powerful drivers of action. In ways that other forms of communication cannot, stories convey messages that tap into a supporter's emotions and inspire action. Creating and sharing stories that show evidence of progress and success can help educational leaders cultivate partnerships and generate resources to sustain programs and initiatives over time.

Data stories combine four key elements:

1 Data	2 Visualizations	3 Narrative	4 Design
Offers a relatively objective perspective.	Make the data accessible.	Brings the data to life and makes the data more compelling.	Presents elements in a visually appealing and compelling way.

Modified from LaTurner & Morgan, 2022, p. 4

Data stories do not need to be lengthy or fancy documents or videos to be effective. Data stories are compelling when they are:

- Easy to follow
- Rooted in facts
- Designed with the right audience in mind.
- Built on the right data. (LaTurner and Morgan, 2022, p. 4)

So how do you write a data story? This toolkit is not meant to be a comprehensive guide to data quality. Instead, it focuses on using the data you have to share your story. To begin, consider who will support the development of the data story. Ideally, this is a collaborative effort among people with data expertise, communications expertise, and programmatic expertise. In many cases, there may also be additional review and sign-off at the leadership level before it is disseminated. Think about who on your team can support the data story development.

Data stories can take a variety of formats. They can be infographics, data visualizations, or narrative stories with embedded data. Here are just a few examples:

- UTeach National Expansion Spring 2024 (utexas.edu)
- Celebrating 150 Years of Connecting Evanston: 2023 Annual Report (epl.org)

Using the *Sharing Your Story* Toolkit

The following subsections are organized by a sample data storytelling process:

- Define a clear objective and identify the target audience.

- Identify and visualize the data.

- Find your voice and craft your story.

- Incorporate design elements.

- Share your story across multiple channels.

Telling stories—especially those of individuals or communities being served by your work—requires care to avoid the exploitation of individuals and perpetuation of biases, stereotypes, and systemic oppression. To keep these considerations at the forefront, each section also includes ethical and equity considerations

Step 1: Define a Clear Objective and Determine the Right Audience.

Effective data stories can raise awareness, cultivate support, and maintain partnerships—but not always all at the same time. Knowing why you are sharing your data, and with whom, informs how you write your story.

What do you want your audience to learn, feel, or do because of this data story?

Before you begin, make sure you are clear on the call to action of your data story. For example:

Sample Sentence Stem	Example
[Audience] will learn/understand [insight] based on [dataset].	The school board will understand how the new STEM professional learning program is impacting schools based on teacher survey data and early student achievement results.
[Audience] will feel [emotion] based on [insight].	The Sunnyside Foundation will feel energized based on the success of our recent efforts to diversify the workforce.
The [audience] will want to take [action] to achieve [change].	Community members will want to volunteer in our schools to support our reading buddies program.

Who is your audience?

Clearly articulate who your audience is and think about what they care about. For example, the information you share with educators is likely going to be different than what you share with businesses. In some cases, you may already know exactly who your audience is and what they value. In other cases, you may need to do research to better understand your audience and what types of stories will resonate with them. If you are talking with an individual, look at their LinkedIn profile, talk with other community members that know them, and look for basic information online. If you are meeting with an organization, review their website to understand their mission, vision, and strategic plan. Reviewing press releases or learning about other causes or organizations they support can be helpful.

Sample audiences:

- Educators
- District leaders
- Boards of education
- Families
- Community members
- Chambers of commerce
- Businesses
- Foundations
- Legislators

When considering your audience, take notes on the following questions. See Appendix A for these questions in a worksheet format.

- In what ways does my work align to the audience's mission, values, and priorities?
- What motivates my audience?
- What does my audience already know?
- What do audience members think they know but really don't?
- What new information does my audience need?
- What questions will my audience have?
- Are my audience members data experts or novices?

- Does my audience prefer high-level insights, or do they look for more details?
- Do numbers engage or overwhelm audience members?

Note: Some of these questions are compiled from Gordon & Conaway (2020), pp. 115-116 and Competency-Based Education Network (2018).

Once you have clearly identified your purpose and audience, you are ready to start thinking about data and your story.

Before You Begin: Ethical Considerations:

1. **Who is the story about, and who is telling the story?**

   There is an inherent power dynamic between program participants and staff who lead programs and are often the storytellers as well. When storytellers craft stories and include experiences of individuals, they run the risk of framing the story from their unique perspective, which is likely different from the actual experience of program participants. One way to address this is to have participants share their own stories and confirm accuracy and authenticity prior to publication.

2. **Are any critical perspectives left out?**

   Highlighting an individual's needs or success in a program can personalize stories. A single story does not offer a holistic view of collective experiences across individuals. To ensure that all critical perspectives are considered in the storytelling process, storytellers may want to be more inclusive by collecting stories across participants, analyzing patterns and trends, and using the data to inform a decision about including an individual story that represents the collective or a collection of stories (Wester, 2023).

3. **Who controls the story, and how is it being used?**

   Be upfront with individuals about the precise use of a story and their contributions, including who the information will be shared with, how widely, and which communication channels will be used. Make sure that there is full transparency and agreement before stories are shared.

Step 2: Identify and Visualize the Data.

Consider the data you have. Data are often stored in multiple places, so an important first step might be to have conversations with your data manager(s), your evaluators, or other contacts responsible for collecting and storing data. Once you have a sense of what is available to you, you'll be better prepared to go through the data storytelling process. See Appendix B for a template for reviewing your data. The following questions provide a few important considerations specific to data stories.

What data will you use?

Consider which data will be most useful to you based on your story audience and objective.

Some data might be nice to share, but they are not central to your story. Based on what data you have access to, consider which data are most relevant to your question and choose that with confidence.

If your data story is focused on the readiness of your students to teach in *middle school* – then identify data that will help you answer that question. Essentially, "start by identifying the data that can inform the topics you'll want to explore instead of looking at all the possible data available" (Mattison, 2023). For example, the readiness of your students to *teach pre-K* might be nice to know – but is not actually answering your question that is focused on middle school.

Be transparent about your data.

Data are imperfect; note their limitations. For example, if you are missing some data, it doesn't mean you don't have a story to tell; just be clear in your writing of your data's limitations. If needed, add text or a footnote to the visualization to give the reader more context.

How do you visualize your data?

Keep data visualizations simple.

Data displays do not need to be fancy. Gordon and Conaway (2023, p. 123) recommend four simple two-dimensional displays, listed in the table below, which are "familiar to many audiences, straightforward to interpret, and easy to format in a way that highlights the most important information". Pie charts are not included in this table because they are tough to interpret and obscure small differences among groups (Gordon and Conaway, 2023).

WHAT DOES THIS DISPLAY SHOW BEST?

Bar Chart	Line Graph	Scatter Plot	Table
• Rankings, with data ordered from low to high or high to low • Differences in quantity or magnitude across groups • Part-to-whole relationships	• Trends over time • Differences between groups in trends over time	• Relationship between two variables when both variables when both variables take on many values	• All the individual values for a variable or a set of variables.

Gordon and Conaway, 2023, p. 124

Summarize your display in your data visualization. Descriptive titles share a key takeaway with the audience and give greater power to the most important finding.

Color is an important feature of data visualizations. They can help highlight key pieces of data and better illuminate differences. For a great blog on using colors in data visualizations, see What to Consider When Choosing Colors for Data Visualization blog. Make sure visualizations are high contrast and avoid color combinations color-blind users cannot differentiate. A color contrast checker like this one can help make sure there is sufficient contrast between colors.

Collecting and Displaying Data: Ethical and Equity Considerations:

Do you have initial active consent to use any personal information? Obtain active consent prior to collecting, using, or sharing any personal information. Active consent, which includes written affirmative agreement, to use personal information is the best. Don't assume that passive consent, or opt-out consent, is sufficient. Take the time to get full agreement on why, what, when, how, and with whom information will be shared (VanDeCarr, 2014).

Make sure your visualizations don't perpetuate inequity. An outstanding three-part blog on this topic by Stephanie Evergreen and Vidya Shanker highlight that even with best intentions – sometimes our visualizations can be misleading and/or perpetuate inequity. They recommend including those you are 'studying' in the conversation; as the authors ask: "Can you take the risk of running your imagery by a trusted friend or colleague and getting some feedback? Can you put yourself out there and test your work with some sample audience members?" Include members of your community (teachers, leaders, students) as part of your storytelling team to make sure the visualizations are not misleading. For more information on inclusive evaluation and research, please check out this resource: Why Am I Always Being Researched.

Once you have data visualized, you can begin to further craft your story.

Step 3: Craft Your Story.

Data stories often include familiar story elements, like characters, conflicts, rising action, falling action, and solution. Use the questions and considerations below to help outline your story. See Appendix C for a data story template.

How did this work come about?

Start with context.

This is a good place to begin establishing credibility. How has your organization or group been working on this previously? Or, if you are using your data story to raise awareness of an issue, how did you become aware of the issue? With data storytelling, you'll want to be able to clearly and succinctly outline your context (one slide or paragraph) in both formal presentations and informal responses and conversations. Keep this lean; after your first draft, take a look and ask, "What can I cut to get to the action faster?"

Who benefits from the work, and how do they benefit?

Connect to a person, group, or community.

Help your reader see the human side of your work. Share information about a person, group, or community impacted by your work. Share their aspirations, their strengths, and the systemic barriers that they face.

What problem are you solving?

Introduce the conflict.

Here you might share more about the depth of the problem you're dealing with. Is it an information problem? A social problem? Data can help illustrate the problem, which also helps focus stories on systems instead of individuals.

How is the world better as a result?

Share your solution—and your data.

Think about the most valuable contribution you can measure and that tells a good story. The solution should represent a change from the beginning of your story. In a classic narrative, protagonists transform through the process of the journey; your data story can also show a journey through changes in the character and changes in your data.

Note the journey of the work.

Your work is not yet done; share the challenges that remain in your work, and what is needed to keep going. This is a crucial point to set the stage for your call to action. Spend time connecting your audience to the logical and emotional appeals of your proposed solution and the path ahead of you so that your ask can really pack a punch.

What's next?

Close, connect, and call to action.

Make an explicit request for support or information on how to get involved. You've teed up your argument, now knock your ask out of the park. Make a clear and concise call for action. A successful data story will help turn your audience into your partners. Sample calls to action include asking people to connect via email or social media, and ask for volunteers, or a request for funding. If your call to action is a specific funding request, demonstrate a specific benefit of giving so that the potential funder can see their impact that their support will have.

Include contact information.

Include a contact person's name, title, phone number, and email. If the person listed as the contact leaves the organization, this information will be out of date. If you anticipate that this data story will be accessible for a long period of time, an alternative approach is to include a specific title or office where someone can get additional information with a shared email address.

Before You Begin: Equity Considerations

1. ***Orient stories toward solutions.*** Innovation is widely perceived as a way forward. A solutions orientation taps into this perception and promotes greater support for programs and services that benefit communities. Routinely, storytellers emphasize problems, disparities and inequities. This framing can be disparaging to participants and result in compassion fatigue (i.e., a sense that there are just too many problems that deserve attention) or intractability interpretation (i.e., a conclusion that a problem is so entrenched that nothing can possibly work). You need to share your program and community's needs, but focus on the solutions and possibilities (Davey, 2009).

2. ***Avoid deficit framing.*** Too often, storytellers define people as problems. Terms like "at-risk youth," "troubled youth," "homeless students," "single-parent homes," and "low-income families" focus on deficits and carry negative connotations (Gallion & Sharma, 2021; Here to Here, 2020). In addition, these terms are racially coded, meaning that they are "seemingly race-neutral but [are] actually a disguise for racial stereotypes without the stigma of explicit racism" (CSSP, 2019, p. 9). See the table below for additional examples. To avoid deficit framing and racially-coded language, start with aspirations and contributions of people and focus on what is possible, rather than what currently exists.

3. ***Use abundance framing.*** Commonly, storytellers use a ***scarcity mindset*** to frame stories, especially to showcase needs: ***"problem + solution = finite impact"*** (Bob Woodruff Foundation, 2019). This can be limiting, especially when persuading potential sustainability partners to support a program. Focusing on opportunities and assets can lead to limitless possibilities for support. Storytellers can use this ***abundance framing***, ***"opportunity + assets = infinite possibility,"*** to tap into potential sustainability partner's personal aspirations and organizational vision. This is a far more powerful and compelling approach (Bob Woodruff Foundation, 2019; Community Foundations of Canada, n.d.)

   Consider this example. "We help at-risk students in high poverty schools."

   Now, consider this revision. "We help determined young students overcome obstacles and achieve their dreams."

Step 4: Incorporate Design Elements.

There are several common features to embed in data stories to create a more visually appealing and interesting story.

Quotes

Using quotes from participants or partners provide glimpses into what happens in a program or its impact. Quotes that describe the impact on an individual can also offer additional evidence as that has personal touch, making a story more vibrant and personalized.

Testimonials

Testimonials from participants or partners offer tremendous value in that they affirm the value of a program or strategy. Sharing how a program has addressed a problem or resulted in an improvement is important evidence that can complement the data story. Testimonials can be written out as short quotes, or they can be shared in video format. Either way, testimonials are ways to provide easy-to-digest evidence of a program's impact.

Photos

Photos can convey information that words cannot. Pictures are a great way to add emotional appeal and add humanity to a data story. When selecting images, take an inclusive approach and avoid perpetuating stereotypes. Consider whether people will see themselves reflected in the visuals (Community Foundations of Canada, n.d.). It is important that the picture selected aligns with the story, is high resolution, and has the necessary permissions from the subject. All photos should also include alternate text to make the data story more accessible.

Videos

Embedding videos into data stories is a powerful way to engage potential sustainability partners in the context of a program. Video production is time and resource intensive, making it prohibitive for many. If resources are available, videos are an excellent way to create highly engaging data into a story. It is important that the video aligns with the story, is high resolution, and has all necessary permissions from the subject. Like with photos, make sure videos are inclusive and do not reinforce stereotypes. Include alternate text.

Hyperlinks

Hyperlinks expand a story's real estate significantly. Readers interested in learning more can click embedded hyperlinks to increase their knowledge and understanding. Hyperlinks should be used strategically and sparingly to add key information without overwhelming a reader with too many hyperlinks. Be sure to test hyperlinks before finalizing and sharing a story. Check the hyperlinks periodically to make sure that they remain active.

Step 5: Share Your Story.

Communication campaigns are a purposeful strategy with a plan that focuses on a specific message with a specific goal related to changing knowledge, attitudes, behavior of an intended audience. Unlike a communications plan, communication campaigns, which can be part of a plan, focus on a singular message. This makes them ideal for disseminating data stories**.** Communication campaigns include a variety of communications shared across multiple channels and over time. This creates coherence and increases greater likelihood of reaching intended audiences. This *PSA Toolkit: Teachers: Leadership Shaping Lives,* created by the US Department of Education, Teach.org, One Million Teachers of Color, and the Hunt Institute, offers an excellent example of what a high quality campaign for data stories could be.

Are you ready to share your story?

Get feedback.

Once you've crafted your story, see if it resonates with people outside your work. Share it with community members or trusted partners and ask for feedback, keeping in mind your audience. For example, if your intended audience is a foundation, ask someone who is familiar with philanthropy to share their feedback. If your intended audience is parents, ask a few parents in the community for feedback.

Attend to details.

The look and feel of data stories matter. Take the time to carefully review and finalize a story prior to sharing. Efforts include editing, proofing, designing, double-checking any hyperlinks, previewing on various platforms or browsers, and ensuring accessibility. See Appendix D for a data story checklist.

What dissemination methods will you use?

Dissemination brings stories to life. There are multiple channels for sharing data stories with expansive opportunities to get the word out. Think about your intended audience—which dissemination method will be best for them? Sharing stories through multiple channels simultaneously (e.g., website, press release, email, and on Instagram) can increase visibility and awareness of a program's progress, success, and needs. **Tip**: If you are using Microsoft Office, use the built-in accessibility checker to improve accessibility in your documents.

Website

Websites are an excellent channel for sharing data stories with potential sustainability partners, staff, and communities. Commonly, stories are shared directly on the website, or they are rewritten as blogs and then posted on websites. If posting on a website, check periodically to make sure that links are still working.

Email

Email lists are essential for continued engagement with interested stakeholders, including existing and prospective funders. Once an email list is set up, this is an easy channel to access on a continued basis. Make sure to update your email list regularly after receiving bouncebacks or as contacts change. If you have a large email contact list, consider testing out two different email formats by sending one to one group and one to another; then review the data available to see if more people opened one version compared to the other.

Video

Videos, when well done, are highly engaging and evoke emotional connections. Making videos has become easier in recent years, but developing, editing, and finalizing videos can still take significant time and resources. When developing videos, ensure that no one is included in the video without proper consent, and consider accessibility up front by making sure closed captioning is available.

Print

Printed materials can help reach audiences who may not be digitally connected, but print-mail is time consuming and expensive. If this option is selected, consider keeping the story to one page for easy of consumption and reduced costs. Attend to things like color contrast and font to make sure the final product is accessible.

Press release

Press releases are formal official announcements about something new or significant. They are an excellent way to keep the media engaged, while potentially gaining widespread traction for stories.

Social media

Social media is a powerful platform for communication, offering speed, widespread reach, flexibility, and high visibility. However, it can feel less personal than other forms of communication. Social media platforms also enable you to keep track of your story's reach through user data.

News media

If you have a newsworthy story to share, consider pitching it to a reporter. Research local reporters and find one who has education as an interest area. If you can consider even more specific interest areas. For example, if you know the reporter is a proponent of charter schools and you are an educator preparation program that places candidates in charter schools, you might want to mention that partnership in your pitch. When talking to a reporter, keep answers concise. Share your data, and emphasize how your work impacts students, teachers, and/or communities.

Before You Share Your Story: Ethical Considerations

- ***Have all contributors reviewed the final product***? Prior to dissemination, circle back to all individuals who have contributed personal touches to the story through photos, videos, anecdotes, or testimonials to give final approval. Ensure that they give final approval to make sure that there is agreement with what is shared, how, and with whom. While this additional step may take extra time, it is a critical action that ensures that their information is portrayed accurately, respectfully, and in alignment with any requests for privacy (VanDeCarr, 2014).

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Appendix A: Understanding Your Audience

Part 1: Identify the purpose of your data story.

Sample Sentence Stems
[Audience] will learn/understand [insight] based on [dataset].
[Audience] will feel [emotion] based on [insight].
The [audience] will want to take [action] to achieve [change].

Purpose statement:

Part 2: Capture what you know about your audience.

1. In what ways does your work align to the audience's mission, values, and priorities?
2. What motivates your audience?
3. What does your audience already know?
4. What do audience members think they know but really don't?
5. What new information does your audience need?
6. What questions will your audience have?
7. Are your audience members data experts or novices?
8. Does your audience prefer high-level insights, or do they look for more details?
9. Do numbers engage or overwhelm audience members?

Note: Some of the questions above are compiled from Gordon & Conaway (2020, pp. 115-116) and Competency Based Education Network (2018).

Part 3: Keeping your audience in mind, identify 1-3 guiding principles you want to use when crafting your data story.

1.
2.
3.

Appendix B: Reviewing Your Data

Data are often stored in a variety of different places. Take a moment to inventory the data you have, who "owns" the data, and which data will be most useful to you given your data story purpose.

What data are available?	Where are the data stored? Who is responsible for the data?	What do the data show?	Are the data relevant and compelling given the story's call to action?

Appendix C: Data Story Template

This template is intended to support your data story drafting. Each section in the template is followed by a self-check, which describes relevant criteria. The template is modified from the CDC Division of Adolescent & School Health Success Story Template.

1. Context

Does this section…?

- Align to an intended audience's aspirations or pain points?
- Capture the overall message of the story?
- Include action verbs?
- Use a hook to grab the hearts and minds of the reader?
- Use language that works across social media platforms?

2. People

Does this section…?

- Include a strong lead sentence to transition from the problem to the solution?
- Describe the solution that was implemented, including where and when it took place and how it addressed the problem?
- Frame the solution based on the target audience's understanding?
- Specify key steps in the solution?
- Identify the target audience of the program/activity?
- Identify who implemented the solution?
- State how existing funding contributed to the solution?

3. Problem/Need:

Does this section…?

- Begin with a strong lead sentence?
- Describe the problem being addressed and why it's important?
- Present a clear, concise statement about a single issue?
- Use data to frame the problem?
- Frame the problem based on the target audience's understanding?
- Specify the affected population(s)?

4. Impact or Solution:

Does this section…?

- Describe specific outcomes? (e.g., money saved, change in educational outcomes, number of people affected)
- Describe the magnitude of the results? (e.g., why the impact matters)
- Use high-quality data?(i.e., trustworthy and credible)
- Use data strategically? (i.e., matched to the target audience, to show what & how)
- Avoid broad, sweeping statements?
- Provide conclusions that wrap up the story in a convincing manner?
- Provide a conclusion to the success story that avoids using broad, sweeping statements such as "There was a noticeable increase in student learning in literacy?"

5. Call to Action:

Does this section…?

- Provide a specific action(s) for potential partners or funders to take?
- Move the reader to a specific action?
- Include specific contact information for follow up, including…? Name:
- Title:
- Organization:
- Phone:
- E-mail:

6. Appealing Features

- Testimonials
- Quotes
- Photo(s)
- Video
- Hyperlinks

Appendix D: Data Story Checklist

Use this checklist internally and with trusted reviewers to get feedback on your data story.

Question	Yes/No	Notes for Improvement
Does the data story quickly capture the attention of the audience?		
Is the story easy to follow?		
Is the data story concise?		
Will the data story resonate with the intended audience?		
Is the data story memorable?		
Does the story focus on the assets of individuals or a community?		
Does the story include relevant data?		
Are the data easy to understand?		
Are the data trustworthy?		
Is the communication format effective?		
Do design elements enhance the story?		
Are visuals easy to read?		
Is there a clear call to action?		
Is contact information included?		
Has everyone who contributed to the piece given consent?		
Is the piece accessible for those with visual impairments or, if in video format, audio impairments?		