

# The Art of Client-Centered Story Collection in Legal Services

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**LEGAL AID**  
OF NORTH CAROLINA



# AGENDA



- 1 **What?**  
What are client-centered stories and lived experiences?
- 2 **Why?**  
Why are they important to our work?
- 3 **How?**  
Getting started and effectively using lived experiences
- 4 **Next Steps**  
Medicaid Lived Experiences Project



# WHAT?

What are client-centered stories  
and lived experiences?



## What are Client-Centered Stories? What is a Lived Experience?

- Client-centered story collection relies on valuing and elevating the lived experiences of our clients and the client-eligible population in North Carolina
- Lived experience - personal knowledge about the world gained through direct, first-hand involvement



# What does a Lived Experience Look Like?



## Video

Can include in-depth recorded interviews, short self-recorded videos, and/or clips



## Audio

Allows participants to use their own voice even if uncomfortable with video option and can maintain anonymity



## Written

Can be written directly by participant or can be transcribed through direct conversation

# WHY?

Why are they important to our work?



# Why are Lived Experiences Critical to our Work?

## Reveals

Reveals issues and conditions that we may be unaware our clients are facing

## Focuses

Focuses our advocacy priorities on the voices of the people we represent



## Persuades

Persuades our funders and decision-makers by showing the direct impact of our work

## Identifies

Identifies patterns, common behaviors, challenges, and barriers

## Empowers

Elevates the voices of those that are the experts about their lives and the challenges they face

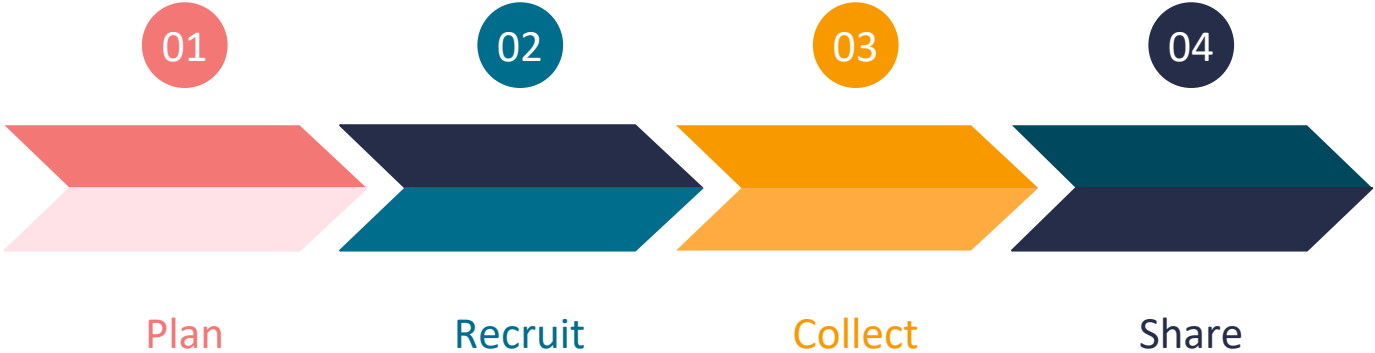
# HOW?

Getting started and effectively  
using lived experiences





# How to Collect Lived Experiences?



## Plan – Getting Started

- Have a clear purpose and objective for using the lived experience
- Build relationships
- Identify what is needed to implement and sustain the effort



# Plan – Getting Started

## Staffing

- Requires staff in various areas of expertise
- Determine organizational strengths
- Consider what type of training is needed to help staff succeed and for participants to be valued and protected in the process
- Create a clear story collection and story promotion process that can stay with your organization

## Technology and Equipment

- Determine what technology and equipment is needed
- Choose how “high tech” to go
- Consider cost to staff and participants
- Assess ease of use for participants and staff
- Determine how you are going to handle spam

## Organization and Storage of Data

- Choose an approach that others within your organization can use
- Consider privacy of participants
- Create robust master database to manage story collection data

# Recruiting

- Recruitment is an essential step in the lived experience process
- Can be very challenging!



# Recruiting



## Current and Former Clients

Reach out personally to those who already have trusted relationship with our organization

## Partner with Organizations

Work closely with trusted community organizations

## Community Events

Meet people where they are and in setting where they feel comfortable

## Effective Strategies

- Give choices
- Give control
- Explain the purpose
- Compensate

# Recruiting Challenges

Hesitation to Participate

Individuals Undervalue Their Own Experiences

Access to and Comfort with Technology



# Collect

- Supporting and listening to participants to share their lived experiences is key
- Be culturally responsive
- Ask broad questions first
- Develop ongoing relationships
- Recognize challenges
- **Be flexible!**



# Collect



## Video

Can include in-depth recorded interviews, short self-recorded videos, and/or clips



## Audio

Allows use their own voice even if uncomfortable with video option and can maintain anonymity



## Written

Can be written directly by participant or can be transcribed through direct conversation



# Share and Amplify

- The final step and most exciting step
- Determine where you want to share the stories that you have collected and how they are going to be used
- Identify what message you want to convey, with the agreement of participants
- Find what mediums are best for amplifying the message



# Share and Amplify

## Media Coverage

### Benefits:

- Educates the public
- Gains attention of decision-makers
- Participants are more willing to share

### Challenges:

- Hard to keep issues newsworthy
- Fear of retribution
- Time availabilities

## Broad Public Dissemination

### Benefits:

- Creates broader understanding of and support for our work
- Counters misleading narratives
- Increases LANC's visibility

### Challenges:

- Changing minds
- Getting attention

## Funders – Current and Potential

### Benefits:

- Shows the work that we are doing from the perspective of those that are receiving assistance
- Database of stories readily available
- Powerful way to show the impact of our work

### Challenges:

- Unsure what types of stories they want
- Deadlines



# NEXT STEPS

Let's Get Started - Legal Aid of  
North Carolina Medicaid Lived  
Experience Project



# Medicaid Lived Experience Project Background

01

Robert Wood  
Johnson  
Foundation

03

North Carolina



National Health  
Law Program

02

Legal Aid of  
North Carolina

04

# Purpose and Objective



## Elevate

Elevate the stories and voices of those who are experts on the day-to-day impacts of Medicaid in NC



## Identify

Identify patterns, challenges, and barriers experienced within the Medicaid system in NC



## Advocate

Inform our advocacy to address the issues that our client eligible population are facing. Amplify the stories that are shared to shift the narrative

# Plan

## Staffing

- Medicaid Appeals Technical Team
- Legal Aid Staff!
- Trusted Community Partners

## Technology and Equipment

- Medicaid Lived Experience Landing Page
- VocalVideo
- Zoom, Teams, Phones
- Flyers with QR Codes

## Organization and Storage of Data

- VocalVideo
- Consent
- Stories
- Storage

The framework has been created and now anyone within the firm can start collecting stories!

# Collect

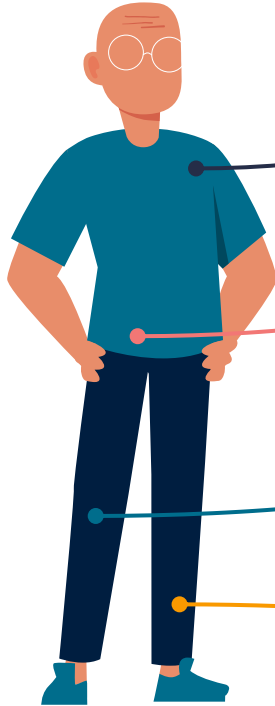
## Refer to MATT

1. Include outreach materials in offices, letters, and at community events
2. Get name and phone number of interested people
3. Fill out Microsoft Teams Form with participant information
4. MATT staff will reach out to participant and conduct story collection and close the loop

## Start Collecting

1. Gather necessary information (name, number, email)
2. VocalVideo (Video and Audio Recording)
3. Zoom/Teams/Other Recording
4. Written – Email, Transcription, etc.
5. Consent (if possible)
6. MATT staff will close the loop

# Collect – Start the Conversation



## Introduce

1. We are collecting stories about experiences with Medicaid in NC – Your Voice Matters!
2. Explain purpose, objective, and how stories will be used.

## Explain

1. Can be anonymous
2. You control how your story is shared
3. If you complete the process you will receive a \$25 honorarium

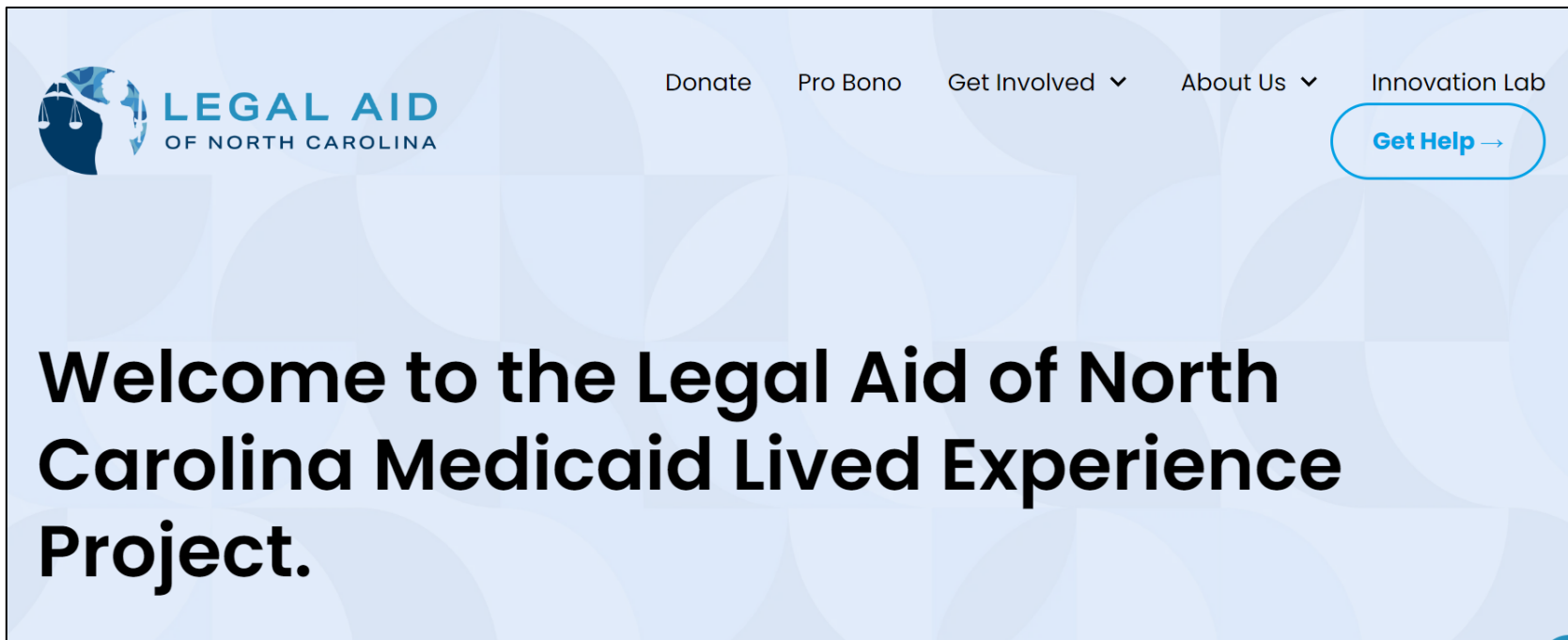
## Give Options

1. Give handout for them to decide later
2. Fill out Microsoft Teams form with them (or take down the info) for MATT
3. Call and follow up with email
4. Collect right away over the phone via transcription or utilize VocalVideo, Zoom/Teams, iPad/Phone




# Collect – Lived Experience Landing Page

[Welcome to the Legal Aid of North Carolina  
Medicaid Lived Experience Project - Legal Aid  
\(legalaidnc.org\)](#)



The screenshot shows the top navigation bar of the Legal Aid of North Carolina website. On the left is the logo, which consists of a blue globe with a white scale of justice and the text "LEGAL AID OF NORTH CAROLINA". To the right of the logo are navigation links: "Donate", "Pro Bono", "Get Involved" with a downward arrow, "About Us" with a downward arrow, and "Innovation Lab". A prominent blue button with rounded corners and a right-pointing arrow contains the text "Get Help". Below the navigation bar, the main heading reads "Welcome to the Legal Aid of North Carolina Medicaid Lived Experience Project." in a large, bold, black font.

 **LEGAL AID**  
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[Donate](#) [Pro Bono](#) [Get Involved](#) [About Us](#) [Innovation Lab](#)

[Get Help](#) →

## Welcome to the Legal Aid of North Carolina Medicaid Lived Experience Project.

# Collect – Lived Experience Landing Page

## VocalVideo LANC Medicaid Lived Experience Project



Thank you so much for recording a short video or audio story about your experiences with Medicaid in North Carolina.

You'll be asked to respond to three questions about your experience with Medicaid regarding: 1) the application process; 2) how Medicaid has impacted you and your family; and, 3) the challenges you may have faced with the Medicaid program.

After you submit your audio or video recording a member of our staff will follow up with you to complete the story

### How it Works



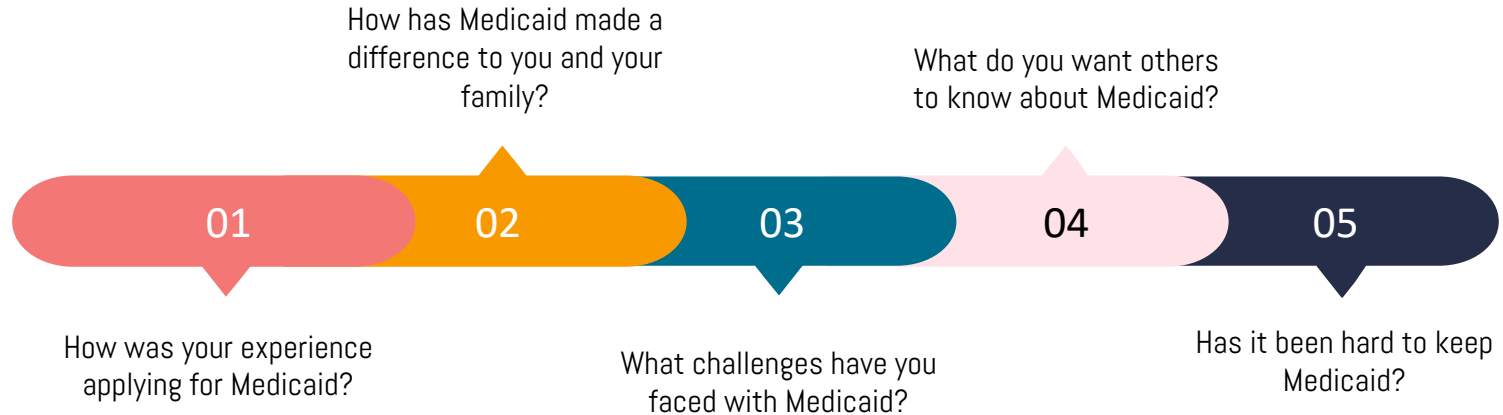
Tell your story by recording short video or audio clips here. Nothing to download or install.

**Let's Go**

Space

Have questions?

# Collect – Sample Questions to Start the Conversation



## Written Examples



### Randall – shared via phone

“When I first got it and I had Medicaid Direct, every time I had to have surgery, I couldn’t get approved. I had to go through H-E-double hockey sticks for operations. Medicaid always wanted me to get physical therapy before surgery, but they would not pay for physical therapy. I had constant hurdles for surgeries, but they would pay for my medications.”



### Kristen - shared via email

“No one should have to worry about being able to afford health insurance. The current income requirements for a parent to receive Medicaid in NC are very old and outdated. How can we expect parents to be able to care for their children while having to neglect their own health? A happy, healthy parent is much better for their children.”

# Participant Recorded Vocal Video Example



## How was the participant recruited?

Flyer distributed by trusted community partner

## Why did participant use VocalVideo?

He wanted to record on his own time and preferred that it be an audio recording. Said that he did not like technology, but using VocalVideo was easy.

## How did we close the loop?

After receiving the recording, I called participant, we emailed him a consent form and once it was signed, I mailed him a \$25 honorarium for his time.

# Participant Recorded Vocal Video Example



## How was the participant recruited?

Flyer distributed by trusted community partner

## How was story collected?

Scheduled a Zoom meeting and had in-depth interview (about 30 minutes) and then edited via VocalVideo

## How did we close the loop?

After recording over Zoom, emailed her a consent form and once it was signed, I mailed her a \$25 honorarium for her time.

# Share and Amplify!



01

## Website and Socials

Share stories on our website and social media accounts

02

## Grant Reporting

Database of stories for grants requesting client-stories

03

## Internal

Educate and share the work that we do with each other



# QUESTIONS?

Thank you!



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