

Storytelling Tips

1. Recruit a volunteer or intern

It may be tempting to ask your volunteer tax preparers to help you collect stories while they're preparing taxes, but we all know how busy and hectic tax preparation can be. If possible, recruit a volunteer whose sole role is to interview clients for stories. You can recruit these volunteers or interns through journalism or English classes at local colleges. These students already have the storytelling skills and interest needed for the job.

It may not be possible to recruit volunteers specifically for story collecting. On a slow day, tax preparers and greeters can act as a story collector in their spare time. Alternatively, your tax volunteers can ask clients if they can follow up with a phone interview at a later time.

2. Start as soon as your site opens

Many people who claim the EITC look forward to tax time and come early in the tax season. Be ready to start at the end of January/ beginning of February so you don't miss anyone.

3. Don't try to interview everyone

If you're the one collecting stories, tell the tax volunteers and site coordinator your plans before the session starts. If volunteers help a client who has received the EITC and is particularly talkative or friendly, they can refer these clients to you while they're waiting to be reviewed, or after the session is over.

4. Be prepared

You want to make this process as smooth and quick as possible for the client. Make sure you have your camera, a list of questions, a [release form](#), and a recording device. The recording device will make it easier to have a natural conversation without having to pause to take notes. It'll also make it easier to get direct quotes. If you need inspiration for questions you can ask, use the [sample interview](#) questions.

5. Be responsive

Wear a name tag and be extra friendly when approaching clients for stories. Many clients come after a long day at work and are tired by the time their taxes are done. Be considerate and open, even if they're not interested in being interviewed. When introducing yourself, you can say, "It looks like you've had a successful time with us here today. Would you be willing to take 5-10 minutes to share your experience? It could help someone else find our services." If they don't have time to answer your questions then, ask them if you can call them later for a brief interview.

6. Use obstacles and challenges to tell a great story

People love a story with tension and challenges. Most stories go something like this: beginning, where you introduce the characters and setting, middle, where characters go through a series of obstacles, and then a turning point, and finally a resolution. For your story, the turning point should be coming to your tax site for help.

To make the story relatable, include personal details about the client. What defines them? It could be their work, their family, their goals, anything. A story without these details is formulaic and frankly boring.

Here is [an example](#) of a story that works really well.

7. Just do it

Interviewing clients can be daunting, especially at first. It's important to just go for it, even if you're nervous! This process will only get easier with time.

8. If all else fails...

We understand that sometimes the tax season is hectic, and you and your volunteers may not have time to interview everyone. If you meet someone at your tax site who has an important story to tell, you can give them an [EITC Story Collection Project card](#) and ask them to leave a voicemail with their phone number and a brief summary their story at 1-888-744-EITC (3482). They can also email us at eitcstories@cbpp.org. We'll give them a call back for an interview.

Questions? Email eitcstories@cbpp.org.