

# STORYTELLING TOOLKIT



Introduction



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***This handbook will guide you in telling the stories of your community.*** The handbook is split into sections based on the different stages of a storytelling project. Each section is full of steps, tips, and things to remember when crafting the audio and video-based stories of your community. You may want to read through the entire handbook before you begin, or you may already be an expert at some of these steps. That's when you can use the sections that are most relevant to you. Check out page 12 for more information on the different sections of the handbook. Good luck with your project!

# TABLE OF CONTENTS

## **INTRODUCTION**

The Power of Storytelling	<b>4</b>
Stories from Main Street   Be Here: Main St.	<b>6</b>
Partners	<b>8</b>
Hoolkit Sections	<b>10</b>

# The Power of Storytelling

*We have always told stories.* Since we were in the caves, or on windswept plains, or settling nearby the river deltas, scratching for survival, we told each other stories. While in tribes, or in clans, we told our stories to each other, around the communal fires we built, telling ourselves we could defeat the terrors out there, beyond the circle of light cast by the flames. Our stories gave us courage, and when infused by real-world experience, they gave us useful knowledge, equipping us to deal with the circumstances confronting us—eat this berry, not that one, store food in a hole dug in the ground, surround yourself with friends on cold nights. Stories are our tools, our elixirs, our libraries and histories. They are integral to who we have been and are vehicles for imagining what we might become. They nurture and feed us. Without stories, we are aimless, holding out torches against the setting sun. With them, we are less afraid, able to recognize our neighbors as fellow keepers of these tales by which we grow generation upon generation. In inventing stories, we invented ourselves, through telling them to each other, we make a community.

Since we began to gather ourselves together into towns and cities, our stories have helped us organize ourselves. The narratives we exchange give the members of our community a shared sense not only of place but also of purpose. Think of the cities that have gained character by the accounts told through them: Montgomery, Alabama, linked to the beginning of the Civil Rights Movement, or Philadelphia, Pennsylvania, known as the birthplace of the great American experiment. Think of how stories can be redemptive: the tale of Detroit working its way back from the brink to become known as a city of second chances. We live in an historical moment when telling our stories is crucial, because they become our truth—a truth that circulates and gives ourselves a vision of our life chances.

For all these reasons the *Be Here* project is an essential venture right now. We need the light and the warmth of stories authentically told and shared. We need them especially from community members who are not typically heard—the citizen storytellers, corner oral historians who have a wealth of lived experience not found in official records or broadcast reports. Our technological tools now allow us to give local voices a new platform; we can pin content to geolocated areas that are triggered through smart phone apps. Visitors walk onto a certain street or plaza and the space suddenly opens up its history, hidden riches for them to take. This initiative is a new and unique form of storytelling, yet it is also part of a deep tradition of making a world for ourselves in which we don't just survive, but we thrive.

– *Seph Rodney*

Seph Rodney is a staff writer and editor for Hyperallergic, a forum for playful, serious, and radical perspectives on art and culture in the world today. Seph also writes and edits for other publications and has particular expertise as a museum visitor engagement specialist.

# Stories from Main Street | Be Here: Main Street

**Created by the Museum on Main Street (MoMS) program within the Smithsonian Institution Traveling Exhibition Service (SITES), “Stories from Main Street” is the Smithsonian’s home for stories from rural America.**

Did you know that about 43% of museums and historical societies in the U.S. are located in small and rural communities? America’s small museums and libraries are the caretakers of a staggering number of objects, photos, and documents that preserve local history. Whether they record the history of your local sports teams, buildings in your area, or the coming of the railroad to your town, local museums tell the complete story!

The work of local volunteers to collect and preserve these materials ensures that stories that are even closer to home can be told. These organizations are centers for the study of American history and culture just like our major museums.

If it happened in small-town America, Museum on Main Street is interested in your story. One of Museum on Main Street’s programmatic commitments is developing collections and programs to help the public better understand the experience of living in America. Even if it seems mundane to you, these stories are important to us all!

Your story matters to the Smithsonian. Imagine hundreds of stories, photos, and videos provided by people from all over the nation. The items stored by the *Stories from Main Street* program and its companion website: *Stories from Main Street*, will give people who call rural America home a place to show everyone what makes each community unique and quintessentially American.

***Be Here: Main Street* is an initiative by the MuseWeb Foundation that builds on the Museum on Main Street's long-standing *Stories from Main Street* project.**

*Be Here: Main Street* is part of a national program, *Be Here*, which capitalizes on the popularity of smartphones and how they offer explorers a new way to discover the hidden culture, history, and stories of your town. *Be Here: Main Street* creates a permanent network of digital stories about the town that residents and visitors can discover and learn from for years to come.

The stories collected through *Be Here: Main Street* are inspired by the content of the Museum on Main Street traveling exhibition and placed on a variety of open and free platforms so the largest number of people possible can benefit from hearing them. The exhibition is the catalyst for the creation of the stories, so these stories may be included in the traveling exhibition in the section containing local content.

*Be Here: Main Street* is covering America in a permanent network of multimedia tours that will reveal connections between towns, cities, and even countries. We all know that a town's economic success is inextricably tied to a thriving cultural sector – and vice versa – so in addition to helping locals tell the town's stories, the initiative connects local businesses and to local cultural destinations, creating guided pathways among the town's points of interest that stimulates culture, tourism and other forms of economic activity.

Ultimately, *Be Here* aims to create a community of towns and cities throughout the United States, learning from one another and ensuring that the geolocation market is used for the technological advancement of our cultural history.

## **Museum on Main Street (MoMS)**

The Museum on Main Street program is the Smithsonian Institution Traveling Exhibition Service's key initiative that directly engages small-town audiences and brings revitalized attention to underserved rural communities through their own Main Street museums, historical societies and other venues.

MoMS develops critical partnerships with state humanities councils to bring Smithsonian traveling exhibitions to small towns. MoMS exhibitions are a powerful catalyst – opening doors to a community's own history, its culture, its people, and to an enhanced pride of place.

To generate grassroots engagement, MoMS works in close collaboration with state humanities councils and more than 1,400 institutions in rural towns across the nation. For these communities (with an average population of 8,000), the opportunity to host the Smithsonian provides much more than a quality educational experience. Through highly targeted community programs and creative activities, MoMS exhibitions become a hub for storytelling and local pride. Residents enthusiastically engage with exhibition content, as diverse community members come together to share and celebrate their heritage. Visit the Museum on Main Street website to learn more at [www.museumonmainstreet.org](http://www.museumonmainstreet.org)



## **MuseWeb Foundation**

The MuseWeb Foundation is a nonprofit offshoot of the international Museums and the Web Conference (MW), which began in 1997 and has since showcased and documented leading work in the cultural field. The MuseWeb Foundation was conceived as an accelerator of cultural innovation to help develop and fund some of the most promising projects and initiatives from the conference and the cultural heritage field at large.

In 2016, the MuseWeb Foundation partnered with the Museum on Main Street (MoMS) program to bring our flagship *Be Here* initiative to the towns hosting MoMS traveling exhibitions. MuseWeb is bringing new technology partners, and new methods of telling stories to the program, so that long after the exhibition has left town, the stories remain – and continue to grow for years to come. Learn more at [www.museweb.us](http://www.museweb.us).

Currently, the cultural stories training and recording with Museum on Main Street happens under the header *Be Here: Main Street*, and uses the hashtag *#bHereMainSt* accross social media platforms.

# Toolkit Sections

**This toolkit is designed to be used as needed.** Not all sections will be relevant to your specific project. Below are descriptions of each section:

## **Introduction**

As you've seen, this section explains the *Stories from Main Street* and *Be Here: Main Street* projects and introduces the national partners.

## **Storytelling Basics**

This section goes over nonfiction narrative and basics of storytelling that will help you craft an engaging nonfiction story about your town. It also helps you narrow down your topic and choose the medium in which you would like to tell your story - audio or video.

## **Research Tips**

This section is to help you if you want to use research to tell a broader narrative about the town. It will guide you through the steps of research and gives tips on how to use archives to find historical documents and images.

## **Scripting**

This section takes you through the steps of scripting audio and video projects, so you have a solid plan as you begin to record your project.

## **Interviewing**

This section is to help you if you plan to interview others for their story. It contains tips and tricks to make sure you get the most out of your interviews.

## **Recording**

This section guides you through the process of recording your audio and video stories. It has tips to make your story dynamic and ensure the quality is high.

## **Editing**

This section will help you as you edit your audio and video projects. There is also a list of free editing software and sites that have free music and sound effects that you can use.

## **Publishing**

This section will help you publish your audio and video stories on Soundcloud and YouTube, as well as geolocate your content on izi.TRAVEL. Each of these platforms has thorough guides on how to upload and use their platforms, so this handbook is simply meant as a starting point and links you to the platform's own user guides for more information.

## **Marketing**

This section is mainly for organizations who want to publicize their content, but can also be used by individuals who want to tell their friends and followers about a story or tour they've created. The guide covers social media, traditional media, and other ideas. It also has examples and templates to use.

## **Facilitated Dialogue**

This section is for organizations who want to plan programming around topics related to the traveling exhibition. The guide walks the organization through planning, facilitating, and evaluating the facilitated dialogue program.



# STORYTELLING TOOLKIT



The Basics of Storytelling



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***This handbook will guide you in telling the stories of your community.*** This handbook is full of information about the basics of storytelling. Rules, story structure, and three important elements of a story that keep the narrative moving. Not sure what storytelling has to do with the true history and events your project will be based on? Read the section on narrative nonfiction to find out. Not all nonfiction is dry and boring!

# TABLE OF CONTENTS

## **STORYTELLING BASICS**

Nonfiction Narrative	4
Choosing a Topic	6
Storytelling Rules	8
Basic Story Structure	10
The Three C's	12
Choosing a Medium Audio vs. Video	14
Place-Based Narrative	16

# Nonfiction Narrative

**Nonfiction narrative goes under many names, including creative nonfiction, literary journalism, and fact-based storytelling.**

Nonfiction narrative combines great research with compelling, character-driven storytelling. Nonfiction narratives use details to create setting, character and theme. Although they are telling true stories, narratives aim to bring the events to life for readers, making it three-dimensional as opposed to simply stating the facts. Other types of nonfiction might focus solely on teaching the audience facts about a topic in a straightforward manner.

For example, a purely informational nonfiction account of a historical event like a war, might tell you dates, give data about how many people died in a war, and relate the facts about the key events of the battles. A narrative nonfiction account would paint the picture of the war, talking about sights, sounds, smells, the soldiers lives and thoughts (all gathered from careful research), and the commanders' personalities, interests, and world views – things that would give the audience a fuller understanding of them as people.

Narrative nonfiction is not made up. It is fact-based. The details added to bring the story to life are pulled from research – first-person interviews or documents like letters. Any descriptions of the setting or events are created using first-person accounts and an understanding of the time period based on research. The characters are real people and their personalities are simply brought to life by what we know about their hopes, dreams, demeanors, etc.

Basically, it's fact-based storytelling that makes people want to keep listening, watching, or reading.



The following pages cover the basic of storytelling. These basics are relevant for nonfiction writing as much as they are for fiction writing. Though the settings, characters, conflict, and the actual events of the story cannot be controlled by you, the story creator, they should be told in the form of a story narrative.

This means that you need an understanding of the basics of storytelling – story structure and elements that when combined, can create a compelling story that not only entertains, it relays the true story of events that happened in your town.

# Choosing a Topic

**The topic of your project should be linked to the theme of the traveling exhibition coming to your community.** First, make sure you understand the exhibition's themes. Check MoMS website for complete details on the exhibition content: <http://www.museumonmainstreet.org>. Now it's time to choose a topic.

**1 Find your interest.** What interests you about this theme? It's important for you to be interested in the topic. Your enthusiasm for the topic will help you convey the story to your intended audience in an engaging way.

**2 Brainstorm.** Taking as much time as you need, write down the themes in the exhibition that interest you. Which ones have the strongest connection to your community? How do they connect to a larger national topic or history?

**3 Determine your audience.** Who is your intended audience? Identifying your audience will help narrow down which themes will work best for that audience, determine how you should frame your story and what medium might be best to convey the story.

**4 Ensure you have the access to the elements you need.** Once you have a theme that works with your interests and audience, do a quick preliminary search for research sources, images, interviewees, archival video, old newspapers, and more, to ensure you will have enough content to complete your project.

**5 Narrow your topic.** Now that you have an idea of what assets are available, make sure your topic is narrow enough to do it justice. For instance, the topic of sports in your community is too large. Instead, narrow it down to one sport, or even better, one team. Having a narrow focus allows you to fully understand and convey the story of that topic.

**6 Decide your medium.** Should your story be told in audio format with images or should you use video? Can you weave your narrative with only words and sounds, or do you need b-roll footage and other moving images? Think about your audience, your resources, and your interests as you decide.

# Storytelling Rules

**Storytelling rules are helpful guidelines to follow, not true rules.** The most important rule when telling a story based on fact – like the stories you will create for this project – is to be as accurate as possible. But you also want your story to be engaging and keep the audience’s interest.

The following “rules” were tweeted by former Pixar employee, Emma Coats. We’ve narrowed them down and reworked them for the purpose of this handbook. While keeping the backbone of true facts in your story, see if you can convey those facts using these elements of great storytelling. Read the original 22 rules from Emma Coats: <https://www.fastcocrete.com/3018559/pixars-22-rules-of-storytelling-visualized>

- 1** What is interesting to the audience is more important than what is fun to do as the creator. They can be very different.
- 2** What’s the essence of your story? Tell it in a sentence or two. If you know that, you can build out from there.
- 3** Come up with your ending before you figure out your middle. Seriously. Endings are hard, get yours working up front.
- 4** Basic story structure looks like: Once upon a time \_\_\_\_. Every day, \_\_\_\_.  
One day \_\_\_\_. Because of that, \_\_\_\_. Because of that, \_\_\_\_. Until finally \_\_\_\_.
- 5** Sometimes your original theme isn’t the same by the time you’re done writing. This is okay. Now rewrite now that you know the real theme.

- 7** Give your characters opinions. Nice, passive characters might seem likable to you as you write, but it's poison to the audience.
- 6** Conflict and change are important. What is your character good at, comfortable with? Do the opposite. Challenge them. How do they deal?
- 8** What are the stakes? Give us reason to root for the character. What happens if they don't succeed? Stack the odds against them.
- 9** Simplify. Remove aspects of the story that don't match your theme. You may feel like you're losing valuable stuff but it strengthens your story.
- 10** Why must you tell THIS story? What's the belief burning within you that your story feeds off of? That's the heart of it.

**Still unsure?** Here's a video series from *Bloop Animation* with examples from Pixar movies to bring the elements of storytelling to life: [https://www.youtube.com/playlist?list=PLY6PCL9ylnRSaO608L0ocvzxusr\\_35XfC](https://www.youtube.com/playlist?list=PLY6PCL9ylnRSaO608L0ocvzxusr_35XfC)

# Basic Story Structure

**A story has three structural elements: A beginning, a middle, and an end.**

Learn more about story structure and “The Three C’s” (next page) in UNESCO’s *How to Write a Documentary Script*: [http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme\\_doc\\_documentary\\_script.pdf](http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme_doc_documentary_script.pdf).

## The Beginning

The beginning sets the tone and mood for the story and hints at the surprises that lie ahead by raising the right questions in the minds of the audience.

**A good beginning does these things:**

- Sets up the flavor of things to come, both in story and mood.
- Establishes the message you want to communicate to the audience.
- Creates curiosity among the audience of the things to come.
- Shows change or the promise of change.
- Creates the element of consequence – an event that causes change.

The *inciting incident* is often a common feature used in the beginning to start a story. It is an incident that radically upsets the balance of forces within the story. It is a dynamic and fully developed event, not something vague. The inciting incident is any event that swings reality in either a negative or positive way, creating imbalance relative to the previous way.

## The Middle

Many a time, a story starts off, but the middle becomes boring. A story must move progressively forward to a final action. The events must become bigger and better and their excitement and involvement must gradually increase as the story moves forward. This is called *progression*. The movement forward needs to be sharp and planned.

The key to a good middle is structure. The storyteller must ensure that the middle of the story presents a chain of logic designed to prove its core assertion. Each event and action must be pertinent and in keeping with the subject and tone of the story.

## **The End**

The end is usually a reiteration of the core assertion of the story. In many stories, this is done by hammering home the assertion with a 'key feature', which could be anything from a phrase to a visual, or many visuals, to one last event that sets the impression. All or many issues are hopefully, or at least temporarily, resolved in the end of a story.

### **Broadly speaking, there are two types of endings in stories:**

**Closed End.** One where all the questions raised in the story are answered and all emotions evoked are satisfied.

**Open End.** One that leaves some or many questions unanswered and some emotions unfulfilled. The questions left are answerable and the emotions resolvable and all that has gone before has led to clear and limited alternatives that make a certain degree of closure possible for the audience.

In non-fiction, the mood of the story must be determined by the events of real life and cannot be controlled by the storyteller. The storyteller must judge the mood of the ending after studying the conclusions the story has come to based on the turn of real-life events.

# The Three C's

## Character

Characters give a human face to any story. They experience the story for the audience. The more the audience knows about a person in the story, the closer they feel to that person. This empathy is important because, through it, the audience can get emotionally involved and be that much more affected by it.

### Two types of characters:

**Active Characters.** Those that initiate the events that take place around them. They take action and make things happen. For example, someone who starts a campaign to change the law is an active character.

**Passive Characters.** Those that react to situations thrust upon them without their choosing. Their actions are brought upon by things happening to them. For example, a farmer whose village has seen drought for two years and struggles to make ends meet is a passive character.

## Conflict

Without conflict, there is no reason for the story to move forward. Characters try and attain their goals in the face of opposition and obstacles. These opposing forces could be big or small, one or many, brief or protracted and in any shape or form. Opposition could come from other characters, organized entities or the situation and environment surrounding the characters.

In non-fiction work, you have to study the various conflicts facing the story's real-life characters and portray them in the story. You must then follow the characters as they try and overcome their 'opponents' in the story. Characters might not overcome all or any of the conflict. Real life isn't always made up of heroes and villains, and the character may fail to achieve what he set out to do.



## Two types of conflict:

**Outer Conflict.** An antagonism from the world around them. This could be from other people, objects, organizations or the environment.

**Inner Conflict.** Conflict inside themselves. This may include their psychology, weaknesses, fears, dark sides, etc. Many stories have a combination of both types because one rarely occurs with the exclusion of the other.

## Change

Change is some aspect of reality becoming different in a particular way. Change must occur in a story. In the beginning, the inciting incident introduces change to the character's life. In the middle, the character must face conflict and, when they do, things change around them and possibly within them. In the end, something must have changed from the beginning and this change lead to the resolution. You must choose which change to include in your story based on how meaningful the change is.

Sometimes change can reverse back to the way things were before the change took place. This is in itself a new change even though the story goes back to a previous state. Here, the change itself is what happens.

## Two types of change:

**Outer Change.** The world around the character changes. This could be physical change, change in other people, objects, situations or the environment.

**Inner Change.** The character changes within. This could be their opinions, beliefs, values, personality, psychology or mental or emotional state.

# Choosing a Medium Audio vs. Video

**Choosing which medium to use for your finished product could be one of the hardest choices you will make for this project.** Below are a few things to consider while you are debating between an audio project or a video project.

## **Usability**

Audio is one of the most easily consumed media in various environments. You can listen to audio while doing almost any activity. You don't have to be staring at a screen. Watching video requires a lot more attention than audio. You need to have access to a screen and dedicate your time solely to watching the video.

## **Cost**

Because you need less equipment, it is less expensive to record audio than video.

## **Time**

You only need to be concerned with sound elements for your final project, not visual elements, so it takes less time to record and edit the final project. When shooting for a video project, you are dealing with more equipment and have to worry about the visual as well as the audio elements of your project. Therefore it takes more time to record and edit a video project.

## **Complexity**

Recording and editing video is a more complicated than audio with color correction, composition, video codecs, resolutions, frame rates, and more.

## **Data Management**

Video files are large. Video projects are more challenging for data management than audio because they require more storage space than audio files.

## Visuals

When done well, audio-only content can be dynamic and engaging, but it can't *show* users the story the way video can. Instead of spending time describing something in order to discuss it, video allows you to simply "show and tell." A person, concept, place, or thing can be brought more clearly to life as the audience can see those things. If you plan to do a lot of interviews, perhaps video would be best as video interviews can be more engaging than sound alone, and can convey other information like body language and expressions.

## Flexibility

When you are recording for a video project, you are also recording high quality audio. You can always use that audio to create an audio-only project, but you can't do the same if you are only recording audio.

## Purpose of the Content

Ultimately, the biggest question to ask yourself as you plan this project, is what is the goal of the project? Which medium will help you meet that goal?

## Special Consideration

If you intend to create a mobile tour for your community, then think about the fact that people will be walking around looking at their surroundings. You won't need video since the visual will be right in front of them.

# Place-Based Narrative

**According to Pew Research Center, nearly two-thirds of Americans are now smartphone owners.** When visitors come to your town, they will likely use their phones to navigate – finding places to stay, to eat, and things to do. Think about turning your project into a mobile or and digital experience that visitors and local alike can use to explore and learn about your town.

There are a variety of digital and mobile platforms out there that allow you to locate your stories on a digital map. - Even the platforms that do not allow location-based tagging, you can add some sort of location - whether it be an address, city, street, lake to its description. This way you can ensure that your listeners understand where this story is relevant, and are able to understand on a deeper level the context of the story.

One of the oldest ways of presenting place-based narratives is by using a tour- whether it is through a live tourguide or a recorded or written tour around a certain area.

A tour is a group typically consisting of 10-15 stories connected by a common theme. Usually, a stop on a tour is between 1-3 minutes. Using the free and open platforms discussed later in this toolkit, you can create and publish geolocated content (content placed virtually in real life locations). The audio and video stories or tour stops should include walking and driving directions as well as text and images if you want your user to experience the entire collection as a tour.

## **Things to consider when developing placed based narrative:**

- Are there physical locations connected to the historic and cultural stories you intend to create?
- Will you have more than one story or several story segments, so you can create several connected stops?
- Will your content be an appropriate length for a walking or driving tour?
- Will your content be in an appropriate format for a walking or driving tour? Audio is best for a mobile tour, though you can also use videos.

If you decide to create a tour, your completed stories will be location based. Keep those locations in mind as you plan and create your story projects. Also, remember that people will be likely be standing when listening to your stories - be kind to their feet and keep the stories short.

## **What if I only have one story?**

If you only have one story, but you still want people to be able to hear it as they explore your town, you can still create a place-based narrative, and use the appropriate apps and maps. You are also able to create a physical installation at the location that is relevant to your audio.

Is this not possible, and users of your stories will likely not go to the location your content is about, you can- at least partly- recreate the environment using images, videos etc.



# STORYTELLING TOOLKIT



Research Tips



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***This handbook will guide you in conducting research for your project.***

Research can seem daunting, but when you break it down into steps, it's actually quite easy and can be fascinating! The best nonfiction narratives use first-person resources – interviews, personal letters and first-hand accounts of time periods. Many of these resources can be found in archives, so we included a little guide to finding and accessing archival material. Good luck!



# TABLE OF CONTENTS

## **RESEARCH**

The Basics of Research	<b>4</b>
Citing Your Sources	<b>6</b>
Using Online Content	<b>8</b>
How to Use Archives	<b>10</b>

# The Basics of Research

**The backbone of any good story is research.** If you don't understand a topic, the narrative of your story will suffer. Below are the basic steps of research.

**1 Determine what topics you need to research.** What information do you need to understand the story of your topic. What time period is your topic based in? What national history do you need to know to understand how your community's story fits into the larger story? Do you understand the intricacies of your topic? If your topic is a specific baseball team, do you understand the rules of the sport? Have those rules changed over the years?

**2 Determine the types of information you'll need.** Do you need to interview locals who have lived through an event or people who are experts on the topic? Do you need newspapers from the time period? Non-fiction books and essays on the time period and topic? Statistics from time period – on population numbers and demographics, sports scores, other numbers? What about letters and first-person accounts from the deceased?

**3 Do preliminary research.** First you need to understand basic facts about the time period and topic. Read *Wikipedia* entries and other overviews of the topic. The sources listed in these overview books and articles are great ones to consult for more in-depth research.

**4 Narrow your research focus.** Now that you have an understanding of the time period and larger themes related to your topic, it's time to focus. Find and read books on the narrow topic you've chosen. This is also when you start finding and using primary sources – newspapers from the time period, first-hand accounts of the topic, interviews with those still living who remember the events.

**5 Access academic sources.** If you have a university nearby, visit their library to use their resources and books. If your community has an archive or museum, ask to access any primary resources they have on your topic. The internet can also be useful for research, but it is often difficult to evaluate the validity of sources you find online. A general rule is anything from a web address ending in .edu and .gov is valid. Remember to record where you found your research, so you can properly cite your sources.

**6 Evaluate your sources.** Pay attention to who is making the claims in your sources and where they get their information. Are the authors stating facts or offering opinions? Are the facts supported by citations of other sources? If you can, consult as many of the original sources cited in the books you are reading. After referencing the original materials, you may have different conclusions than the author you are reading.

**7 Organize your information.** If you feel that you've done enough research to craft an informative and engaging narrative, organize the information you've gathered in an outline. This will give your project a form, and give you a good way to see if you have any gaps in knowledge that you need to research further.

**8 Cite your sources.** You need to keep track of which resources your research is coming from – titles, authors, page numbers, etc. – so you can cite your sources. Once you've finished with your project, you'll need to cite the sources you used to craft your narrative. This way you show that you are not intending to plagiarize someone else's ideas, and your audience can consult those sources to learn more about the topic.

# Citing Your Sources

**Citations identify a published work (e.g. book, article, chapter, web site).**

Citing a source means that you show, within your project, written, audio, or video, that you took words, ideas, figures, images, etc. from another place.

## **Cite sources to:**

- Show you've done proper research by listing sources you used
- Be a responsible scholar by giving credit to other researchers
- Avoid plagiarism by quoting words and ideas used by other authors
- Allow your reader to track down the sources you used

## **Citations contain:**

- Author name(s)
- Titles of books, articles, and journals
- Date of publication
- Page numbers
- Volume and issue numbers (for articles)

## **You must cite:**

- Facts, figures, ideas, or information that is not common knowledge
- Ideas, words, theories, or exact language another person published
- Another person's exact words should be quoted and cited

**When in doubt, be safe and cite your source!**

**How to cite in a video project:**

- Put citations on an endscreen of the video
- And/or put citations in the text description of the video
- When conducting interviews, always use lower third captions to identify the person being interviewed

**How to cite in a audio project:**

- Put citations in the text description
- If you quote someone in the story, be sure to identify who originally said that quotation
- If you use interview audio make sure they are identified either by the person introducing themselves or in the voiceover

**Citation Formats:**

The two citation formats most often used by humanities and history projects are MLA and Chicago Style. Visit their websites to learn how to cite sources in these styles.

- **MLA:** <https://style.mla.org>
- **Chicago Style:** <http://www.chicagomanualofstyle.org>

# Using Online Content

**Online content can be a great help with your research.** But realize not all online content is created equal. You may not always be allowed to use content you find online, depending on the user agreement under which it is published.

## Licensing

When using images or videos from the internet:

- Beware of the license that is provided allows your use of it
- No licensing available does not mean it's a free for all
- There is a difference between free and unlicensed

## Public Domain Content

- In general, works published after 1977 will not fall into the public domain until 70 years after the death of author
- For corporate works, anonymous works, or works for hire, 95 years from the date of publication or 120 years from the date of creation, whichever expires first.

## Creative Commons Content

"Creative Commons (CC) helps you legally share your knowledge and creativity to build a more equitable, accessible, and innovative world."

- <https://creativecommons.org/> lists all the various licenses available
- Consider sharing your own work with a creative commons license

## Museums and Archives

- Many Major museums have opened their collections for free and unlimited use.
- In some cases, museum content can even be used commercially.

**Some of the major sources of content to consider.** Some of the platforms below provide a wide variety of content.

### **Flickr**

- Many images on this platform can be used under the Creative Commons license
- Some images have all rights reserved, so check the particular license
- Allows you to search images with a particular license only.

### **Vimeo**

- Has videos with various licences, but uses the Creative Commons system for licensing
- Allows to filter search of videos depending cc license you need

### **Wikimedia Commons:**

- Is the overarching organization of world's largest crowdsourced encyclopedia of content: wikipedia.
- Media of all types can be found here and can be reused based on the uploader's original licensing requirements

### **Google:**

- Google aggregates any image they can find on the internet, with a large variety of usage rights. Not all images are available for use under all circumstances.
- Allows filtering of search depending on usage rights after initiating search

**Do your due diligence : Always read the fine print of licences!**

# How to Use Archives

**Archives exist both to preserve historic materials and to make them available for use.** Learn more from *Using Archives: A Guide to Effective Research*: <http://www2.archivists.org/book/export/html/14460>.

## Types of Archival Materials

Archives can hold both published and unpublished materials, and those materials can be in any format. Some examples are manuscripts, letters, photographs, moving image and sound materials, artwork, books, diaries, artifacts, and the digital equivalents of all of these things. Materials in an archive are often unique, specialized, or rare objects, meaning very few of them exist in the world, or they are the only ones of their kind.

## Finding archives:

- Use Google to see if there are archives specific to your topic.
- Consult bibliographies and works cited sections in books on your topic.
- Contact experts in the field. Where did they go for their research?
- Look for websites dedicated to your topic. Do they list any archives?
- Talk to a reference librarian at your local library about accessing the WorldCat database, which includes listings for archival materials.
- Search ArchiveGrid at <http://beta.worldcat.org/archivegrid>. This database contains nearly a million collection descriptions.
- Search the National Archives and Records Administration at <http://www.archives.gov>.
- Search the Library of Congress: <https://www.loc.gov>.
- Search the National Union Catalog of Manuscript Collections (NUCMC) at <http://www.loc.gov/coll/nucmc>.



**Requesting Material:**

Access policies vary among archives, but ask yourself or the archive's staff these questions to see if you can access to materials without visiting in person:

- Has the material been digitized and is it available online?
- Are the materials you want to see available through interlibrary loan?
- Are the materials you want available through libraries other than the repository at which you found them? Check WorldCat database.
- Will the archives provide scans or photocopies of the materials you wish to consult? There may be fees associated.
- Do you have a simple question that can be answered by having the archival staff view the materials on your behalf?

**Visiting:**

If you need to visit the archives in person, you should plan ahead for your visit:

- Inform the archival staff of the date(s) that you intend to visit and the materials you would like to see.
- Check to see whether there are any limits on the amount of materials you may request or specific request times.
- Review guidelines for using materials at the archives. Look for these to be posted on the repository website, or ask a staff member.
- Examine the reproduction policies of the archives. Regulations and fees for requesting photocopies, scans, etc. vary among archives.
- Ask whether the archives offers Internet access and accommodates personal laptop computers.
- Schedule additional time for the unexpected. Discoveries may lead you down different avenues than you had originally anticipated.



# STORYTELLING TOOLKIT



Scripting



Smithsonian  
Institution



**MUSEWEB  
FOUNDATION**

*This handbook will guide you through the process of scripting your audio, video, and tour projects.* Remember, when creating a video project, you also have to have a deep understanding of all the elements of audio. And your tour can be either audio or video, so be sure to pay attention to all the aspects of scripting a project.

# TABLE OF CONTENTS

## **SCRIPTING**

Scripting Basics	4
Audio Elements	6
Writing for Audio	8
Video Elements	10
Writing for Video	12
Writing Video Narrative/Commentary	14
Creating a Mobile Tour	16
Universal Design	18
Adding Your Project to the Community	20
Script Example 1	22
Script Example 2	24

# Scripting Basics

**A script is a document that outlines every aural, visual, behavioral, and lingual element required to tell a story.** It contains the words that will be spoken in the finished piece, as well as instructions for the elements of audio and video that should be captured as the piece is recorded. It is a production document. There are three main steps to creating a script.

**The Brief.** Creating a brief allows you to document the answers to really important project questions. Explain your goals, target audience, topic, and intended takeaways when developing your brief. This is the document you will use to ensure all your future decisions match your intended goals.

**The Outline.** An outline should be the second step to creating your script. You need to know your story's beginning, middle, and end before you get started. Once you have the basic skeleton of your project written out, you can make sure the story makes sense and fill in the details of the assets you need to gather (images, audio, video).

**The Script.** This doesn't have to be fancy. It's purpose is strictly functional. It's a set of directions for you to follow when creating the final product. Like a blueprint. As you map out what you want your final product to sound and/or look like, write in instructions on how many camera angles you need on different shots, and what kind of audio and/or video you need to record at each location.

## **Write in plain, conversational English**

When writing the narrative elements of your script, you want to write how the narrator/voice over should speak, not how you would write a formal paper. Practice speaking it out loud to see if it sounds too formal.

## **Make it thorough**

A script doesn't just include dialogue or voice over scripting. If your finished product will require multiple shots, people, or scenes, include these details. For video, be sure to include any necessary information about the location, actions that should be taken on camera, and visual elements – including clothing choices.

## **Format for easy reading**

Format the elements like b-roll, sound effects, text overlays, and voiceover, background sounds, and other audio recordings by using different colors, fonts or callouts to visually differentiate the elements of your script.

## **Script every word**

For any voice over or narration, script *every* word. Ad-libbing never works. You will have to do multiple takes and you want each take to be as similar to the last one as possible. You also want to ensure the timing is exactly right. Scripting will save you a lot of time and frustration.

## **Make it short**

For both audio and video, shorter is better than long. Cut out any unnecessary aspects of your script. Attention spans are short. Make sure you get to your point before you lose your audience's interest.

For a tour, remember that people will be standing while listening to your tour. Be respectful of their feet and make it short. Entertaining, but brief.

# Audio Elements

**There are eight elements to audio.** Your job is to decide which elements will appear at which points in the final piece, whether in combination or solo. Learn more about the elements of audio recording from B-side Radio: <http://bsideradio.org/learn/recording-audio-in-the-public-radio-style>.

## Actualities

These are audio recordings gathered during interviews. In video recordings, this element is often called “talking heads.”

## Voice over

These are the recordings created by you or someone you recruit that links all the elements together and tells the story. It can feature one or more people.

## Ambience

These are natural sound effects from the world that help set a scene. If you were at a dairy, this would be the sound of a cow mooing. At a construction site, it would be the sound of a saw or a hammer. Get your microphone right up next to the source of the sound you’re trying to capture. Try to record a minute of this, though often only 5-10 seconds of it will be used.

## Background sound

This is the sound of a place (often also called ambience). Not a singular easily discernable sound but rather the full spectrum of sounds. For this, you don’t want to point your microphone at anything in particular, just stand in a location and record. You should record at least a minute of this in every place.



## Room Tone

This is the sound of a room - the lights, the hum of the air conditioner, cars outside, etc. When you record an interview in a room, the sound of the room is always there behind the voice of your interviewee. This sound will differ as you edit in interviews from different rooms, places, and your own narration. Moving between the different audio clips can sometimes be jarring depending on how present the room tone is. You can smooth this transition by mixing in room tone behind your voice. You need to gather at least 45 seconds to a minute of room tone in each room where you do an interview, more if there are distinct sounds happening, like cars going by.

## Sound effects

This is any sound that is artificially injected into the soundtrack to enhance it. This could be a natural sound like the ambience you recorded to a digitally created sound.

## Silence

This is the lack of any sound over a particular moment in a finished piece. In audio-only pieces, silence should almost never be used unless you need it to make a dramatic point.

## Music

Background music appeals on an emotional level with the audience. It can be used to establish a particular time period, geographical location, or identify a particular community. *See the Appendix to learn more about music rights and permissions.*

# Writing for Audio

**Writing for audio is different than most types of writing.** Unlike the reader, the listener often has no opportunity to reread what has been said if they miss something or need clarification. As such, preparing material that will be read aloud requires a slightly different approach than preparing written material. Below are ten tips on how to write for the ear:

- 1 Embrace a conversational tone.** Remember that storytelling is a dialogue, not a monologue, and that you want to be engaging and natural in your speech.
- 2 Keep your sentences short and simple.** Avoid compound or complex sentences, and abide by the basic subject-verb-object structure.
- 3 Use a simple vocabulary.** Big words sound impressive, but they can cause your listener to get lost. Remember that you are speaking to a general audience, and write your story accordingly. If you need to use complicated words or concepts, consider defining the terms as you read.
- 4 Avoid passive voice.** Use active verbs and be direct. This will give your statements more impact. Ex. passive: “she was walking toward the house” vs. active: “she walked toward the house.”
- 5 Use contractions.** Remember that you want the conversation to flow naturally. For a more seamless delivery use “can’t” instead of “cannot.”

- 6 Punctuate for rhythm.** Consider the way your story will sound when spoken out loud and use punctuation to mark pauses and place emphasis. Remember to pace yourself and allow time for your audience to absorb what has been said.
- 7 Round your numbers.** Unless there is a reason for you to use the exact number, simplify your story by rounding figures to the nearest whole.
- 8 Use a straightforward, linear narrative.** With audio recordings, there is virtue in clarity. Remember that a listener cannot always rewind if they get lost, so make sure that the structure of your story follows a chronological order with a beginning, middle and end.
- 9 Read it out loud.** When you have finished drafting your story, read it aloud. What sounds good in your head might not sound natural when read out loud. Reading your story aloud will help you identify problems with rhythm and sentence structure.
- 10 Use dialogue (if possible).** For a listener, it is easier and more interesting to jump into the story when they can be the third (or more) member of a conversation, rather than being talked to.

# Video Elements

**There are five main elements to video.** Your job is to decide which elements (and their sub-elements) will appear at which points in the video, whether in combination or solo. Learn more from UNESCO's *How to Write a Documentary Script*: [http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme\\_doc\\_documentary\\_script.pdf](http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme_doc_documentary_script.pdf).

## Visual Images

**Single Shot.** A shot is a single “take” on an action. Something needs to be “happening” in a shot for the audience to see. The images, the action, the events should not be random. They have to be meaningful.

**Sequence.** A sequence is a collection of shots put together that tell a story continuously – like a series of close-up and wide-angle views of someone driving to work. Putting several action shots like this together creates events.

**Montage.** A montage is a sequence of sorts. It's a process of combining a number of small shots and weaving them together to communicate a large amount of information in a short time - like time passing in a person's life.

**Talking heads.** This includes interviews of people on camera or people talking directly to the audience on camera or both.

**Colors, textures and Lines.** Elements of line, texture and color all carry their own weights in a film. Color and its presence or absence from a film can make a significant difference to the film's message and mood.

## Print and other graphics

This can be identification of the talking heads, orienting text like dates and places over a location, or newspaper clippings and headings to emphasize a point being made by the narration. Video is about showing, not telling, so use print and graphics sparingly and purposefully.

## Speech

**Narrative commentary / Voice over.** Narration is the commentary that sometimes accompanies a visual image in a documentary. It's also often called a 'voice-over' and it can be spoken by one or more off-screen commentators.

**Talking heads or interviews.** An effective way to communicate information.

## Music

Background music appeals on an emotional level with the audience. Music is also used to establish a particular geographical location or identify a particular community. *See the Appendix to learn more about music rights and permissions.*

## Noise

**Ambient sound.** The sound that is naturally present and is recorded simultaneously with it is essential to the creation of a location atmosphere.

**Sound effects.** Any sound that is artificially injected into the soundtrack to enhance it – natural or digitally created.

**Silence.** The lack of any sound over a particular moment in a film forces the audience to focus on the visual. Silence should be used sparingly.

# Writing for Video

**Writing for video is different than writing for audio.** Though audio is an important factor in video, most of the story should be brought to life through visual elements. Learn more from UNESCO's *How to Write a Documentary Script*: [http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme\\_doc\\_documentary\\_script.pdf](http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme_doc_documentary_script.pdf).

**Show, don't tell.** Video is a visual medium. Unlike a novel, a video script is never 'read' literally by the audience and therefore you should try and incorporate most of the information you have to give into a visual format. For example, rather than telling the audience that a man is a farmer, you should show the man working in his fields. It always helps to show character and event action rather than talk about it or include it in narration because the audience is then able to experience it themselves, making it more real for them.

**Show through action and movement.** There is a reason we call them "moving images" and you should keep that in mind. The visual must be kept moving; the characters must be 'doing' something. The audience will react to movement on screen with interest and to static images with boredom.

**Visual pertinence.** Simply put, visual pertinence is keeping the visuals relevant to the subject and sustaining the flow of action. Don't show a farmer working behind a desk in a bank unless he works there part-time.

It is important for you to structure sequences according to the point in time they appear in the video. If a character has just suffered a major loss, then don't show a sequence where they go to a party unless that's what they would do naturally in that situation.

**Emotional pertinence.** Emotional pertinence is controlling the emotional reaction of the audience and making it relevant to the story at that point in the video. This can be done by emphasizing emotional details or triggers which will provide the desired emotional response from the audience.

**Moods and Metaphors.** You have many visual tools at your disposal including the control of visual mood and visual metaphors to represent an idea that would be otherwise difficult to portray visually. For example, a sequence which features a man working late into the night in his office could be full of shadows to add to the perception of time.

**Special effects.** Sometimes, special effects like slow motion, where a visual is slowed down in time, help create and regulate tempo and rhythm in a video as well as enhance emotional value at certain points. Dissolving from one shot to another helps create smoother visual flow. Special effects may or may not be incorporated into the script in great detail. It is not advisable to use too many special effects in a non-fiction video because they alter the nature of reality.

# Writing Video Narrative/Commentary

**Sound is crucial to video, but remember that the visual always comes first.** Narration is part of the overall narrative, but does not lead the narrative. Learn more from UNESCO's *How to Write a Documentary Script*: [http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme\\_doc\\_documentary\\_script.pdf](http://www.unesco.org/new/fileadmin/MULTIMEDIA/HQ/CI/CI/pdf/programme_doc_documentary_script.pdf).

When deciding who the narrator(s) will be, remember, this choice has to be made both on a narrative-relevance level and an artistic level. The narrator needs to be someone who adds value and drives the video's narrative forward.

## First-person narration

The person whose point of view (POV) is currently being represented visually and story-wise is the narrator. This narrator talks in terms of 'I' and brings their limited POV across to the audience via the spoken word. This narrator is a character in the video and may or may not be shown visually at the time their voice is speaking. First-person narration should follow the rules of first-person narrative, which is that only one character's POV can be shown at a time, despite the fact that multiple characters may be narrators in the video.

## Second-person narration

The person or people narrating the video directly address the audience as "you" and force the audience into the story. This is common in vlog-style videos you might see on YouTube – like in VlogBrothers or Vsauce videos.

## Third-person narration

A popular choice is when an all-knowing, omnipresent entity narrates the story, referring to all the characters within the video as 'he' or 'she.' This narrator's POV is all-pervasive even though it is less personal.



## Rules to writing video narration:

- 1 Narration should back up a visual, not overpower it.** Also, if something is being shown visually, then there is no need for the narration to mention it as well. The narration should say what the visual doesn't say and should be in tune with the actions taking place at that point in the video.
- 2 Keep narration relevant.** Many scriptwriters use the narration for information-shoving at the audience. The narration should be as focused, clear-cut, short and relevant as possible. Information should be given on a need basis only and when the particular subject has been sufficiently covered, it should stop.
- 3 Keep narration simple.** Big words and fancy sentences are lost on an audience that has to keep track of multiple elements coming toward them at the same time. In fact, a verbose narration only makes the story harder for them to follow. A good narration is precise and simple and works in tune with the other elements of the video without trying to be grandiose.
- 4 Practice speaking the narration as you write it.** The narration will ultimately be spoken. Reading it out aloud will reveal how it sounds and allow you to correct and replace words or sentences that don't flow. It also gives an indication of how much time the narration will take to speak out aloud and will allow you to time it to the visual elements.

# Creating a Mobile Tour

**The main goal of the *Be Here: Main Street* project is to cover your community in stories of its history and culture.** These stories are sometimes stand-alone stories on a map, but often they are connected stories that follow a specific theme, like a tour of local historic buildings, a scenic byway, or popular tourist spot. If you create a mobile tour, here are a few things to keep in mind.

**1 Have a clear theme and objectives.** A tour consists of stops that are connected in some way. What topic or story connects your tour? Even if that theme is simply “highlights of the community.” What should people take away from the tour? Should they learn about a time period they didn’t know about? Understand how your town fits into a national narrative?

**2 Know your audience.** Are you creating a children/family tour or a tour for adults, an enthusiast’s tour or an amateur’s tour, a tour for locals or a tour for tourists? Then you’ll know how to approach your topic – what vocabulary to use, what features to point out, how in-depth you should be, etc.

**3 Tell a story.** Each stop on its own has a story that should be told in an engaging way, but the entire tour overall should also tell a story. Arrange the stops in a logical order, so each stop builds on the last one. And make sure your enthusiasm for the topic comes through. Take your users back in time, bring the story to life for them.

**4 Highlight the unique.** Why are the stops you chose important? What makes them unique or important to the overarching story of your tour? When people take tours, they want to see something special. Make sure each of your stops is important to the story and interesting to the audience.

- 5 Have discipline.** You have chosen a topic and objectives for your tour. Now comes the hard part. Sticking to them. You may run across some amazing information about a stop on your tour, but if it doesn't match your theme, it doesn't belong in your tour. Perhaps you can create a future tour or standalone stop with that information, but for the purposes of a cohesive tour, stick to the theme.
- 6 Ensure the locations are accessible.** This requires visiting the stops on the tour to discover any potential barriers to users visiting the location or seeing the elements you are referencing in your tour. For instance, if you talk about the back of a house, make sure the visitors can see it. If not, include a picture of it in the tour and point them to that image.
- 7 Consider customizing the tour.** This is a mobile tour, but that doesn't mean you can't gain inspiration from a human tour guide. What if someone wants to take your tour, but can't dedicate the time for the entire tour. Are there stops in your tour that can be skipped for those with less time? You can create an indicating marker on those stops - perhaps in the directions.
- 8 Create a brief overview of the tour.** When writing the script, don't forget to create an overview, along with some of the major highlights users can expect to see. Tell them how long the tour will run, and let them know if there are any special considerations to make - like whether the stops are far apart, whether the tour is aimed at a specific audience, or if any of the stops on the tour are difficult to reach.

# Universal Design

**As you are planning your project, make sure you make it accessible to people with differing abilities.** If you are creating a video, be sure to include captions. For an audio project, include a transcript. For tours, pay attention to the route. Are there a lot of stairs? Is the route wheelchair accessible?

The intent of inclusive or universal design is to simplify life for everyone by making products, communications, and environments more usable by as many people as possible. This benefits people of all ages and abilities.

In 1997, the Center for Universal Design at North Carolina State University, Raleigh, published seven principles of universal design for buildings, outdoor environments, and products: [https://www.ncsu.edu/ncsu/design/cud/about\\_ud/udprinciples.htm](https://www.ncsu.edu/ncsu/design/cud/about_ud/udprinciples.htm).

**1 Equitable use.** The design is useful and marketable to people with diverse abilities. Avoid segregating or stigmatizing any users by providing the same means of use for all users: identical whenever possible; equivalent when not. Ask yourself how people with different abilities can access and enjoy your project.

**2 Flexibility in use.** The design accommodates a wide range of individual preferences and abilities. Provide choice in methods of use (add captions to your video and transcripts to your audio), and if you are directing someone in an action (like walking to the next tour stop), make your instructions very clear to aid the user's accuracy and precision.

- 3 Simple and intuitive use.** Use of the design is easy to understand, regardless of the user's experience, knowledge, language skills, or current concentration level. If creating a tour, provide effective prompting and feedback during and after a stop to direct their attention to an appropriate focal point and let them know when it's time to move on to the next stop.
- 4 Perceptible information.** The design communicates necessary information effectively to the user, regardless of ambient conditions or the user's sensory abilities. Use different modes (verbal and visual) for redundant presentation of essential information.
- 5 Tolerance for error.** The design minimizes hazards and the adverse consequences of accidental or unintended actions. Provide warnings of hazards and errors when directing someone to the different tour stops, if a stop is in a dangerous area, remind the user to be pay attention to their surroundings.
- 6 Low physical effort.** The design can be used efficiently and comfortably and with a minimum of fatigue. Try to avoid steps or awkward locations that only someone in peak physical shape can reach.
- 7 Size and space for approach and use.** Appropriate size and space is provided for approach, reach, manipulation, and use regardless of user's body size, posture, or mobility. Ensure the locations for the tours have enough space for wheelchairs and other assistive devices. If they don't, offer an alternative way for people to experience the content of that stop - perhaps a video tour of that location.

# Adding Your Project to the Community

**At the end of your audio piece, your video, or your tour, please include a way for others to connect your stories to many others that are part of a larger storytelling initiative.**

The following line can be read or written into your content:

*This [tour, video, or whichever format] was made for Be Here: Main Street, a program created by the MuseWeb Foundation, in collaboration with the Smithsonian Institution Traveling Exhibition Service (SITES).*

It's also a great idea to include the hashtag, **#bHereMainSt** in your description, keywords, or tags. This is a way for anyone to explore the richness of the stories submitted on various platforms, whether they are on YouTube, SoundCloud, Facebook, or izi.Travel. Please add the hashtag (**#bHereMainSt**) in your content, perhaps as the last frame in your video and in the textual description. From a practical point of view, including the hashtag is an important way for you to track your own content, related content, and to respond to what others may be saying about your story on social media.

If you'd like to alert Museum on Main Street and MuseWeb about your fantastic, newly posted content, please add our handles to your social media content, and be sure to use the **#bHereMainSt** hashtag.

## Facebook

<https://www.facebook.com/museumonmainstreet>

<https://www.facebook.com/museweb>

## Twitter

@museumonmainst

@museweb

# Script Example 1

<b>VIDEO</b>	<b>AUDIO</b>
<b>On Camera Med</b>	<p>How your video sounds will make or break your story. Most videos involve a person speaking, so you need to pay attention to the conditions around you. Especially when you are indoors, like your office.</p> <p>For the best audio stop and really listen to your surroundings. You may discover the “silence” is full of background noise. Noise that can ruin your story.</p>
<b>Cut in to guy on phone, hallway conversation, Windows media player, CU turn off computer</b>	<p>Can you hear the guy in the next office? A hallway conversation? The fan on your computer? What about music?</p> <p>If it is noisy, move, ask people to be quiet and turn off everything you don't need.</p>
<b>Holding up lav, shotgun, hand-help, camera</b>	<p>So how do you know what microphone you should use? They come in all shapes and sizes.</p>
<b>CU mics on cameras</b>	<p>This is the camera mic. You'll find it behind a metal screen somewhere on the front of your camera.</p> <p>These omnidirectional microphones pick up sound from all around.</p>
<b>Med shot</b>	<p>If you are recording something you want your audience to hear and understand, and you are using the camera mic, you have to be close.</p>
<b>XCU face</b>	<p>Really close.</p>
<b>Wide shot in conference room or office first line with camera mic, second with lav</b>	<p>Otherwise your voice is just going to get lost in the background sound.</p> <p>I said, “Otherwise your voice is just going to get lost in the background sound.”</p>



<b>VIDEO</b>	<b>AUDIO</b>
<b>Med office or hallway</b>	So if you're shooting something in which audio is crucial to telling your story you'll achieve far better results with an external mic.
<b>Holding up a Flip and a Zi8</b>	What should you look for? First, make sure your camera has an audio input--not all do. This one does, this one doesn't. A mic jack should be criteria for what camera to use.
<b>CU lavalier Clip on shirt</b>	<p>For interviews and presentations, choose a lavalier--also known as a lav, or lapel mike.</p> <p>A lavalier microphone is a small microphone that clips onto clothing. Because this is a better quality mic and because it is close to the sound source, your audio will sound better.</p>
<b>Med on camera Hold up shotgun and fishpole</b>	<p>They range in price from \$20 to \$200, and even a cheap one is better than your camera mic.</p> <p>Another option is a shotgun mic. These can get expensive, and they don't amplify the sound as much as they cut down on the ambient noise. For this mic, you still want to be close to the sound source.</p>
<b>Paolo on headset talking to screen</b>	Finally, for a podcast, software demonstration or voice over, a headset is a great cost-effective solution. They come with either a USB plug or a plug for the mic input on your computer.
<b>Med on camera</b>	Remember that nothing ruins a video like bad audio. If your audience has to work to understand what is being said they will leave. It is that simple. Give them audio that doesn't get in the way of your story.
<p><i>Audio for the Office v1</i>  <a href="http://youtu.be/iFdhxzvhG3U">http://youtu.be/iFdhxzvhG3U</a>  <a href="http://www.storyguide.net">www.storyguide.net</a></p>	

# Script Example 2

<b>VIDEO</b>	<b>AUDIO</b>
<b>On camera on the beach</b>	Sound is a critical part of your video. If your audience can't understand your message they won't stick around. That seems pretty obvious.
<b>Hawaii footage</b>	But music is also a critical component to creating successful videos. It gives your video texture, ambiance and sets the emotional tone of your message.
<b>On camera - riding bikes</b>	But not just any song will do under your video.
<b>Hawaii footage underwater</b>	First, what is the relationship between the subject and the tempo and style of the music? It has to match. If your story is serious, and the cadence of the voice is slow, you can't have a jarring heavy metal song or silly tune in the background. It confuses the audience.
<b>Hawaii bike footage</b>	The opposite is true, too. If the scene is full of fast edits and quick activity, a slow melodic music will change the entire atmosphere of your video.
<b>On camera in park</b>	The audience gets emotional cues from your music choices. Your music tells them how to feel throughout your story.
<b>On camera in park</b>	That means you need to determine the tone and emotional destination BEFORE you choose your music. It will make your song choice easy.
<b>On camera on beach</b>	And if you are putting music behind a voice, be it narration or on camera, it can't fight for the viewer's attention. If it is too loud....The result is a mess. It has to be soft enough to complement, but not so quiet it sounds like someone left the radio on 20 feet away. And if there is a pause in the narration... Just make the music a little louder for a moment and bring it back down. It can emphasize a point in your message.

<b>VIDEO</b>	<b>AUDIO</b>
<b>Edit timeline demo music</b>	One other technique for using music in a video is called back-timing. Back-timing is when your song ends when your video ends. To work you need to choose a song that has a clean ending. In other words it resolves with a last note like this:
<b>Edit timeline demo music</b>	Not just fading out like this:
<b>Edit timeline demo music</b>	To back-time my music I find the end of the song, align it with the end of my video, and extend the song backwards so it starts earlier in my story. Now when the story ends, the song comes to a close.
<b>On camera beach</b>	One last note, be careful to find royalty-free music. It's illegal to use copy written music without paying for rights. Don't just grab a CD, or download something from iTunes and put it in your video. You are breaking the law.
<b>Web sites / Graphic</b>	There are plenty of sources on the web where you can download free or inexpensive music you can license. It can be frustrating to sift through many of the selections. But take the time to do it because theft can be a career ending move.
<b>On camera beach</b>	Music in your video is a really powerful tool. Use it to set the tone of your story. And frame your message.
<p><i>Music in Your Video Script 1.2</i>  <a href="http://youtu.be/Opp_CnnwXDY">http://youtu.be/Opp_CnnwXDY</a>  <a href="http://www.storyguide.net">www.storyguide.net</a></p>	



# STORYTELLING TOOLKIT



Interviewing



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***This handbook will guide you in interviewing people for your project.*** You have to do proper research on your subject and the interviewee to craft questions that will lead to compelling content, and you have to pay attention to your interviewee's answers in order to respond to them with more than just the next question. Sometimes you have to prompt them to dig deeper and cover uncomfortable topics. The tips in this handbook will help you prepare for and lead a great interview.

# TABLE OF CONTENTS

## **INTERVIEWING**

Interview Tips	4
Oral History Tips	6
Recording and Photographic Release Form	8

# Interview Tips

**Hearing from experts on a topic or people who have lived through a particular moment can help unearth new facts and aspects of your story.**

The following tips will help you conduct successful interviews.

**1 Plan.** Know what you're asking for. What is the topic you plan to cover? Who are the best people to cover that topic? Research on the internet or reach out to local contacts to find the best person/people to interview.

**2 Contact potential interviewees.** Write a short, clear email that tells them who you are and why you are contacting them and what format the interview will be in and what it will be used for. Offer a way to contact you in person – usually a phone number is best.

**3 Write well-researched questions.** Research your topic so you can create educated questions that cover the things most relevant to the topic you've chosen. Do not ask for basic definitions and statistics you could have found somewhere else. Take the time to fully understand the person you are interviewing. Search for interviews they've done in the past to get a feel for their style and to more fully understand their work.

**4 Group questions into topics of discussion.** Arrange questions in a way that allows experts to build on their answers to your previous questions. And mentally learn to treat an interview like a discussion on a topic instead of a Q&A period.



**5 Conduct the interview.** Introduce yourself, explain the project, give a general overview of the topic you have chosen, and request permission to record the conversation before starting your recorder or camera. Most important – relax! This isn't scary. You are prepared and your interviewee is interested in participating in your project. They want to help you by answering your questions.

**6 Listen.** Focus on what's being said by the speaker rather than on your list of questions. When you provide a strict set of questions, you can miss out on huge opportunities to build rapport and investigate responses. When you interview, consider their responses. Don't mindlessly ask your list of questions. Participate in the conversation.

**7 Become comfortable with silence.** After you ask your question, your interviewee may need time to think about their answer. Let them think. It's tough, but don't rush them.

**8 Ask permission to follow up.** You may find when reviewing the interview that you didn't cover everything. Get their permission to contact them for further clarification and perhaps a follow-up interview.

# Oral History Tips

**Interviewing a person about their experiences during a time period or about a part of their life is called an oral history.** The following tips will help you create effective oral history interview questions. You can learn more from UCLA's *Interviewing Guidelines*: <http://oralhistory.library.ucla.edu/interviewGuidelines.html>

- 1 Ask large questions first.** Questions that begin "Tell me about . . ." or "Can you describe . . ." are good ways of stimulating the interviewee's memory and describe his or her experiences at length.
- 2 Focus on the interviewee's experience, not just facts or opinions.** Always ask the interviewee to speak in terms of their concrete experiences and not simply about what they think people in general felt or did.
- 3 Do not interrupt.** Interruptions disrupt the flow of narrative, break the speaker's concentration, and they may never return to what they were about to say. Wait until the interviewee completes a story or train of thought to ask a follow-up question or introduce a new topic. If they are long-winded or rambling, you may need to jump in very quickly when a story is completed.
- 4 Be ready with follow-up questions.** Much of your role is to be alert to what the interviewee does not say and to help him or her expand the story so that it is more meaningful for others – ask them for greater detail, context, clarification, and evaluation.
- 5 Questions should be concise and focused.** Try to be as precise as possible, and ask only one question at a time.

**6 Avoid having the questions feel choppy and disconnected.** Clearly indicate shifts in direction or how one question relates to another. For example, use the following transitions: “We’ve talked about X, but now I’d like to move on to . . .” or “I’d like to follow up on something you said previously . . .”

**7 Yes-or-no and leading questions should be avoided.** Only use yes-or-no questions when clarifying specific details of a story. And leading questions – those that begin “Don’t you think that . . .” may prevent an interviewee from sharing their own thoughts on an issue.

**8 Don’t begin with highly personal or sensitive questions.** As the interviewee becomes more relaxed with the interview situation, they will invariably open up and often be willing to discuss issues they would not have been willing to discuss at the beginning of the interview.

**9 Challenge the interviewee when necessary.** If you feel there is more to a story than the interviewee is telling or that the interviewee is glossing over negative aspects, politely but firmly challenge the interviewee. This can generally be done by simply asking for explanations of facts that do not fit with your understanding or by calling attention to other ways of perceiving the situation. Such challenges often appear less confrontational if you refer to other sources that disagree with the interviewee or, in a more general way, to “criticisms at the time” or to “arguments I have heard.”

# Recording and Photographic Release Form

I, \_\_\_\_\_, hereby grant the Smithsonian Institution, the MuseWeb Foundation, and its educational partners, the rights to my story, photographs, audio, and video content without payment or any other consideration. I understand that my content may be edited, copied, exhibited, published or distributed and waive the right to inspect or approve the finished product wherein my likeness appears. I also understand that this material may be used in diverse educational settings within an unrestricted geographic area.

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If your content is selected by the Smithsonian, the MuseWeb Foundation, or one its educational partners for posting, website visitors may share your content via social media websites such as Facebook, YouTube, Twitter, and applications such as "ShareThis." These sites operate independently of the Smithsonian and the MuseWeb Foundation and have their own privacy policies (any data that the Smithsonian collects on these sites is subject to [www.si.edu/privacy](http://www.si.edu/privacy)).

By signing this form, you waive any privacy expectations you may have with regard to the submitted content. Do not submit any content or personally identifiable information that you do not want made public.

There is no time limit on the validity of this release nor is there any geographic limitation on where these materials may be distributed.

By signing this form I acknowledge that I have completely read and fully understand the above release and agree to be bound thereby. I hereby release any and all claims against any person or organization utilizing this material for educational purposes.

Full Name \_\_\_\_\_

Postal Code/Zip Code \_\_\_\_\_

Email Address \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

If this release is obtained from a presenter under the age of 19, then the signature of that presenter's parent or legal guardian is also required.

Parent's Signature \_\_\_\_\_ Date \_\_\_\_\_

# INTERVIEWING

Laws pertaining to the recording of sound differ from state to state. Best practice for recording conversations, and for the purpose of this project, is to get the consent of all parties. For more information on your state's laws on recording conversations, you can reference the Reporting Committee's *Reporter's Recording Guide*: <http://www.rcfp.org/reporters-recording-guide>.

**Use the form on the opposite page (page 8) to gain written permission from anyone you record – audio or video – for your project.**



# STORYTELLING TOOLKIT



Recording



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***This handbook will guide you in recording the stories of your community.***

Both audio and video project recording tips are in this handbook. If you are recording a video project, remember that audio is a very important aspect to your video, so read all the audio sections as well. At the end of the handbook is a *Recording Release Form* template. Get everyone you record to sign either this form or a similar one to ensure that everyone being recorded understands how their recording will be used.



# TABLE OF CONTENTS

## **RECORDING**

Audio Recording Tips	<b>4</b>
Reading the Script	<b>6</b>
Audio Recording Equipment	<b>8</b>
Video Recording Tips	<b>10</b>
Video Recording Tips for Interviews	<b>12</b>
Video Recording Equipment	<b>14</b>
Recording and Photographic Release Form	<b>16</b>

# Audio Recording Tips

**There are many elements to sound that we don't notice until we are trying to record a specific event.** Below are tips to help you record your interview and voice over narration audio. Learn more about audio recording from B-side Radio: <http://bsideradio.org/learn/recording-audio-in-the-public-radio-style/>

**1 Choose an appropriate recording location.** Interviewees often want to meet at a local coffee shop, but the only time you want to record there is if you're doing a story about coffee. It is best to talk to people in their natural environments or a location relevant to the story, so the sound under the interview advances the story (or at least doesn't distract from it). Except, of course, when that environment is really noisy – interview them in a quiet spot then go to the noisy place for ambiance and to get them to show you around.

**2 Position the mic.** Hold or place the mic or other recording device fairly close to the person's mouth. The best place to hold the mic is 3-5 inches away from their mouth. If you have a high-quality standing mic and you're in a quiet environment, you can place it 6-8 inches away. Explain to the interviewee that it helps you get the best possible sound. Often when people say words that start with the letter P, the burst of air makes a popping sound in the mic. This is what we call "P-popping" or plosives. To avoid it, hold your mic slightly off to the side – out of their airstream.

**3 Position yourself.** If you are holding the mic, rest your arm on a table or against your torso. You don't want to be holding your arm out in front of you unless you have to because it will start to hurt very quickly. Hold your hand steady. The mic will pick up everything: your fingers rubbing against the mic, tapping, rustling papers, cameras clicking, or phone notifications.

**4 Record a test.** Test your equipment before your interviewee gets there or while you are introducing yourself and your project, to make sure it all sounds right. Listen to the audio playback with headphones. Headphones help isolate the audio and you'll be able to hear any problems better than if you listen with speakers.

**5 Set your levels.** For the best quality, set the levels on your recorder manually and as high as you can without having the sound distort because it's too loud. This is something that you constantly have to think about. Some people speak more loudly than others. Some people are really soft and then get animated. Ask the interviewee to give their name and title in the beginning to set the initial levels, and pay attention to their volume throughout the interview.

**6 Be silent.** When you're having a conversation, it's natural to respond with an occasional "yes" or "uh huh." But when you're recording an interview, that's a big no no. No one wants to hear you saying "uh huh" in the middle of a sound bite. Resist your inclination to vocalize and instead tell the interviewee you're listening with facial expressions. Smile, nod, scrunch your nose, just don't vocalize.

**7 Dampen the sound.** When recording voice over narration, avoid the audio bouncing around the room by finding some way to focus the audio on the mic, rather than the walls of your room. Some people use foam boxes around the back of their mic. Others use pillows or record under a blanket.

# Reading the Script

**Reading a script for voice over narration is not as easy as you may think.**

Here are a few simple tips to help you create professional voiceover recordings. Learn more from “Can You Hear Me Now?": <http://lpd.nau.edu/can-you-hear-me-now-tips-for-recording-your-best-audio/>

- 1 Make sure your script is easy to read.** Don't try to fit your entire script onto one page in tiny font. Make the font large and double or triple space it. Record in a well-lit room that will make the script easy to read.
- 2 Face the microphone.** This can be hard when you need to read a piece of paper on the table or held in your hands. And holding a script in your hands can cause unwanted noise in your recording. Tape your script or place it upright somewhere so you are facing the microphone.
- 3 Avoid excess noise.** Your microphone picks up on everything. If you swivel in your chair, tap your ring on the table, someone walks in and shuts the door (even in the next room!), redo that audio.
- 4 Stand up while recording.** You'll feel more energized and be able to breathe better. If you do sit, don't slouch. Sit up straight and keep your chin out. Don't let it drop to your chest.
- 5 Don't ad-lib.** Odds are that you'll have to do multiple takes. Sticking with the script lets you find a common edit point on re-takes.
- 6 Practice.** It can make perfect sense on paper, but when you speak it, it doesn't work. Read it, make edits, read it again, and again, and again. Knowing what you are reading will make a real of difference when you record.

**7 Create a conversational tone.** Pretend like you're talking to someone rather than just reading a script. If you mess up, leave a noticeable pause and keep on going. You can cut the error out of the audio in editing.

**8 Stress vocal emphasis.** Pay attention to the most important piece of information within the sentence. Read a sentence aloud, then go back and read that sentence with different emphasis on different parts of the sentence. Did you notice how the focus and meaning of the sentence changed?

**9 Pay attention to inflection.** Much like vocal emphasis, inflection – the change in volume and tone of your voice – can change the way your information comes across. Inflection is also important in avoiding being monotone. Sound excited and interested. This will translate to your audience and help keep them excited, interested and engaged.

**10 Record silence.** By recording up to a minute of silence, you have a way to sample the ambient noise to filter it out later, or use it to smoothly transition into audio with different room and ambient noise.

**11 Mark your retakes.** If you do multiple takes, create a marker. Leave about 5 seconds of silence and then indicate what it is, like “section one, take two...”

# Audio Recording Equipment

**If you can't access any of the below equipment, you can record all audio on your smartphone and create your own dampeners and screens if you need them.** Here is a list of basic audio recording equipment you may want to consider:

**Recorder.** The industry standard is a flash type recorder. You want to be able to adjust your record levels. You want to be able to plug in a microphone. And ideally, the recorder would also have a great built-in mic because sometime plugging in an external mic isn't practical.

**Omni-directional microphone.** This type of microphone tends to record sound with a very warm quality, picking up not just what you're pointing at, but some of the other sound around it. This is good for recording interviews in quiet places and for gathering the general ambient sound of a place.

**Unidirectional microphone (shotgun mic).** These microphones tend to be long and thin. They are very sensitive and pick up mostly the sound of what you're pointing at. They're great for recording interviews in noisy places and for gathering sound of quiet or distant things.

**Laveleer microphone.** Lav mics are extremely small, and are designed to easily clip onto the shirt or jacket collar of the speaker. This gives very close proximity to their mouth. It will take some time to attach the lav to your subject and run cables back to your digital recording device or setup a wireless system, so keep set-up time in mind if using this mic.

**Handheld microphone.** Handheld mics are large, designed to be seen but take no time to set up. This makes them perfect for a quick audio recording, where you may need to approach the subject and begin recording immediately in a busy environment. They are best used when placed very close to the chosen sound source, so microphone technique is important.

**Headphones.** The bigger, the better. Wear headphones at all times while recording so you know what you're getting on tape. It's best to use headphones that fully cover your ears.

**Sound dampener.** Sound from your voice reaches the microphone directly and then indirectly after bouncing off walls, floors and ceiling. That distance is enough for the sound to become out of sync and record a bit of an echo. Most people use foam tiles on their walls or place their microphone in a sound dampening box.

**Pop Filter/Microphone Screen.** A pop filter or pop shield is noise protection filter for microphones. It serves to reduce or eliminate 'popping' sounds caused by fast moving air on the microphone during recorded speech. It also keeps moisture off the microphone which can cause mold growth.

**Wind screen.** Wind on a microphone makes a rumbly distorting sound. Foam windshields work indoors to reduce noise, but are not good for outdoor recording unless there is very little wind around. For outdoor recording in the wind, get an outdoor windscreen known as a deadcat.

# Video Recording Tips

**There are a lot of things to keep in mind when recording video footage.**

Below are a few tips to help you record your video project. Learn more about recording video from UC Berkeley: [https://multimedia.journalism.berkeley.edu/tutorials/shooting\\_tips/](https://multimedia.journalism.berkeley.edu/tutorials/shooting_tips/)

**1 Don't talk while the camera is rolling.** When the camera is rolling it picks up all ambient sound, not just what you're focusing on. And you won't be able to separate the unwanted audio out in the editing process.

**2 Hold your shots.** Hold shots for at least 15 seconds before you pan, zoom or go onto another shot. That way you'll be sure you have enough video of a scene to work with later when you do your editing.

**3 Don't excessively pan and zoom.** Don't constantly pan from side to side or zoom in and out with the camera. Instead start with a static, wide angle shot, and hold it for 15 seconds. Then make your move to zoom in or pan, and hold the next static shot for an additional 15 seconds.

**4 Get all the shots you need.** Make sure you get a variety of shots, even if you don't think you'll use them. They may come in handy. A-roll is the main subject of your shot, usually with audio like an interview. B-roll is the background video, often just video over which you'll lay an audio track.

**5 Be aware of depth of field.** Be aware of ways to increase the sense of depth within your shot, since video images are inherently flat. If you're shooting someone, try to include other objects in the background or foreground that give the viewer a sense of depth.



- 6 Change angles and perspectives.** Look for interesting perspectives. Don't shoot everything from eye level – it's boring. For example, if you're shooting a scene like people walking on a sidewalk, hold the camera low to show their feet moving, rather than just shots of their faces. Or if you're shooting someone working at a computer terminal, take one shot from over their shoulder, then another that is a close-up of their hands and fingers using the keyboard and mouse, then a shot of their face looking at the screen. A good ratio is 50 percent closeups and extreme closeups, 25 percent medium shots, and 25 percent wide shots.
- 7 Have people in your scenes.** Try to get people in your shots, which almost always makes the video more interesting. Don't do a static shot of a building – include people walking in and out to animate the scene.
- 8 Use tripods for steady shots.** Use a tripod to get a steady shot, especially if you're shooting something that is not moving or an interview. If you don't have a tripod or you're doing a shot where you'll have to move quickly, use something to steady your camera, like leaning against a tree.

# Video Recording Tips for Interviews

**Interview footage is often the main element of a nonfiction video project.**

It's important to get it right. Below are tips to help you record your interview.

Learn more about recording interviews from UC Berkeley: [https://multimedia.journalism.berkeley.edu/tutorials/shooting\\_tips/](https://multimedia.journalism.berkeley.edu/tutorials/shooting_tips/)

- 1 Scout the location.** Physically go to the location ahead of the shoot. What type of lighting is there? Is there electrical power? Is there ambient noise? What other problems can you anticipate?
- 2 Pack extra batteries and memory cards.** You don't want the limitations of your batteries or memory to cut a shoot short, so bring plenty of both.
- 3 Communicate with your interviewees.** You don't want to find that your talent has worn a shirt that doesn't work on camera. Send them an email with what to expect, clothing considerations, and contact information.
- 4 Define a creative style for your production.** How will the interviews be lit? Will the interviewer be on camera as well? Will the subject look at the interviewer or the camera? Make sure the look is clearly defined and used across all interviews.
- 5 Repeat the question in the answer.** Try to have your interviewee repeat the question in their response. For example if you ask, "What is your favorite color?" and their response is "Green", it doesn't give the editor much to go on. Instead a better response would be "My favorite color is green".

- 6 Watch out for distracting noises.** Don't use a chair with wheels or that squeaks. Beware of nervous activity – like tapping fingers or jangling change. Stop your shoot, point it out, and then start shooting again.
- 7 Get multiple angles.** Having at least two cameras will make editing much easier and more dynamic. For example, if your subject had to pause to sneeze you can cut it out by switching to the other angle in editing.
- 8 Shoot b-roll of the interviewee.** Capture this footage at the start or end of the interview. Typical shots include asking the interviewee to nod on camera, or getting shots of them at their job or other relevant activity.
- 9 Don't use the zoom function.** Instead use care when framing and composing your shots and do any additional cropping and zoom work in the video editor.
- 10 Frame and compose your shots.** Pay attention to your surroundings and don't be shy about rearranging furniture, moving things on a desk, pushing plants out of view, or asking the interviewee to change positions so you properly frame the shot. If you're having technical problems, stop the interview until you have fixed them.
- 11 Leave noseroom and headroom.** Don't leave excessive empty space above a person's head – that's dead space. Put a little room above a person's head in a shot, but have more room below the person's face – space you can use to add text in editing. If you're shooting a person standing, get their entire body in the shot. And if the person is looking to the side, add space in the direction in which the person is looking.

# Video Recording Equipment

**If you aren't able to access any of the below equipment, you can record all video on your smartphone.** If you are recording video on your phone, you will need an external microphone for audio recording the scenes you are shooting. Here is a list of basic video recording equipment you may want to consider.

**Video Camera.** What camera you choose depends on your budget, the type of shooting you're doing (static, stealth, etc.) and where you plan to showcase your film (web-only, theater, broadcast). You can shoot on anything from your smartphone to a DSLR to a top-of-line camera such as the Red Epic.

**Tripod.** A necessary piece of equipment to keep your footage looking steady and professional. Get a tripod with a fluid head for smoother looking pans.

**Camera Light.** Sometimes a nice pop of light from the camera can help fill in shadows. This is a nice accessory especially in a shoot where you might not have time for a full 3-point lighting set-up.

**Three-Point Lighting Kit.** You only need this if you're planning a lot of shooting inside. Creating a well-lit scene usually involves a 3-way lighting set-up.

**Microphone.** You cannot depend on the camera's microphone. They aren't strong enough. See the page on audio recording equipment for other options.

**Boom Pole.** A boom mic set-up comes in handy to capture audio from a group interview, crowd scenes or any situation where you need to gather professional audio quickly.

**Audio (XLR) Cables.** If you plan to use a professional audio set-up with your camera, you'll need XLR cables to go from your camera to the mic.

**Light Reflector.** A reflector is a tool that reflects existing light. Their primary purpose is to fix shadows. If you are shooting outdoors during the day, a reflector can be used to fix odd shadows on the face, or prevent a backlit subject from becoming a silhouette.

**Lenses.** There are many options. The standard lens is among the easiest to use, as it provides a similar viewing angle to the human eye. A wide-angle lens capture more of the scene than the human eye can focus on. Telephoto lenses are designed to zoom in on very far-away subjects. Macro lenses are specialized lenses that excel at close-up scenes. A prime lens is the opposite of a zoom lens: it has a single focal length, so they can't zoom, but because they have fewer moving parts, they often produce higher-quality images.

**Extra Batteries.** Don't get caught without enough batteries out on a shoot.

**Memory Cards.** You'll need somewhere to record the footage you'll be shooting. One memory card will not be enough. They can fill up quickly.

**External Hard Drive.** A portable hard drive comes in handy if you plan to do a lot of shooting in the field and need to offload your footage from your camera's memory cards.

**Camera Bag.** You need something sturdy and weatherproof to put all your gear in.

# Recording and Photographic Release Form

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By signing this form, you waive any privacy expectations you may have with regard to the submitted content. Do not submit any content or personally identifiable information that you do not want made public.

There is no time limit on the validity of this release nor is there any geographic limitation on where these materials may be distributed.

By signing this form I acknowledge that I have completely read and fully understand the above release and agree to be bound thereby. I hereby release any and all claims against any person or organization utilizing this material for educational purposes.

Full Name \_\_\_\_\_

Postal Code/Zip Code \_\_\_\_\_

Email Address \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

If this release is obtained from a presenter under the age of 19, then the signature of that presenter's parent or legal guardian is also required.

Parent's Signature \_\_\_\_\_ Date \_\_\_\_\_

# RECORDING

Laws pertaining to the recording of sound differ from state to state. Best practice for recording conversations, and for the purpose of this project, is to get the consent of all parties. For more information on your state's laws on recording conversations, you can reference the Reporting Committee's *Reporter's Recording Guide*: <http://www.rcfp.org/reporters-recording-guide>.

**Use the form on the opposite page (page 16) to gain written permission from anyone you record – audio or video – for your project.**





# STORYTELLING TOOLKIT



Editing



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***This handbook will guide you in editing your project.*** Once again, remember that if you are editing a video project, audio is a big component of that project, so be sure to read all the audio sections as well. It is also important to read the information about intellectual property in order to understand the importance of choosing royalty free and public domain songs and sound effects when completing your project.

# TABLE OF CONTENTS

## **EDITING**

Audio Editing Basics	4
Editing for the Ear	6
Video Editing Basics	8
Free Audio and Video Editing Tools	10
Intellectual Property Rights	12
Sources for Sound and Music	14

# Audio Editing Basics

**Ever made a collage with paper? Editing audio is a lot of cutting, pasting, and moving parts to form a whole.** You first have to find the best audio for each moment, clean it, and then arrange and layer the different audio elements to create a pleasing soundtrack that tells the story. The tips below should help you as you edit your project.

- 1 Mix the audio.** Most audio projects use two or more tracks. Mixing is the blending of those tracks together. Remember to balance your levels. For example, your project might include a vocal track and music. You want to lower the volume of the music when the vocal is playing.
- 2 Always dissolve or fade new tracks.** A new sound appearing out of nowhere is very jarring for the listener. Even a short fade-in can make the sound enter more naturally. Use dissolves when one sound is leaving at the same time another is entering.
- 3 Don't forget room tone and background noise.** If you are creating an audio track for a scene, it won't sound natural unless you include a recording from the space that the scene is taking place. It may seem silly to add what seems like silence in an empty space, but it is absolutely essential for setting a scene.
- 4 Edit dialogue.** Dialog editing often involves creative decision-making. You may need to edit out "uhs", stutters, distracting pauses, vocal stumbles, and sometimes words or phrases that you deem unnecessary, or unsuitable. Done well, these kinds of edits can make a tentative, halting speaker sound smooth and focused, but done poorly, it could potentially sound unnatural, so take care in your choices.

**5 Minimize differences in audio clips in the same scene.** Sometimes you'll find that the audio in different shots from the same scene have differences in the background ambience. For example, if you shoot a conversation in a city park, and the shoot lasts all day, you may notice that some shots have more traffic noise in the background because of rush hour. You'll need to edit more "rush hour" background noise into the quieter clips, so that all the clips sound the same. Usually, the shot with the highest ambient background noise level dictates the noise level for other clips.

**6 Make sure your audio edit points aren't noticeable.** Editing audio clips in a sequence mainly involves finding good edit points that sound natural. Audio edit points are often more effective when they are offset from the corresponding video edits. Although you may set your initial audio and video edit points in the same place to create a quick rough cut, editing your audio more finely may involve moving your audio edit points to overlap the end of the video cuts. Those overlapping frames will turn an otherwise obvious cut into a much smoother transition.

**7 Crop out or trim the silence.** At the beginning and end of clips and sometimes at points in the middle, you'll have periods of near silence when no one is speaking. To make your recording as 'neat' and professional sounding as possible, you'll want to remove these "silent" sections.

**8 Normalize the audio.** In general, you'll want the audio of all your scenes to be the same volume – making quiet speakers louder and louder voice more quiet. This requires normalizing the audio on all your clips so they match.

# Editing for the Ear

**The first audio edit should be one for the ear.** Make sure it sounds good. The first time you edit a story will be the only time for you to hear it the way a user would. It should be well-paced, with strong transitions and have a strong storyline – with a surprise or “aha” moment. More information can be found in *Editorial Training* by NPR: <http://training.npr.org/audio/how-to-edit-with-your-ears/>.

## What to listen for during an edit for the ear:

- When did I tune out or get bored?
- When was I confused?
- When was the audio hard to hear or distracting?
- Is any audio misleading?
- When did the story make clear, powerful points?
- Is a key point missing?
- Does the structure of the story make sense?
- Does the tension build through their piece?
- When did something feel off about the audio levels or the story?
- Were there moments that were harsh to the ear or contradictory?
- When did I smile, laugh or feel happy?

## How to use the script during an edit for the ear:

- Make quick, simple marks along the margins: for example, mark an “?” near a section that confused you, then quickly look up again
- Add a checkmark beside a moment you liked
- If you tuned out or got bored, note roughly when that happened.
- If one section raises a clear question, note it – “Why”?

## Four things not to do when editing for the ear:

- 1 Don't line edit.** Don't worry yet about grammar, word choice or line-by-line writing. Save that for later edits.
- 2 Don't get distracted by one glaring flaw.** If you focus too much on one thing you hear, you'll miss other parts of the piece. Just note it, and then return to it.
- 3 Don't explain away problems you hear.** For example, let's say some audio is hard to hear, and your first instinct is, "I couldn't hear that." But what if, almost instantaneously, your next thought is, "Well, maybe it's clear enough. . ."? After all, we're all busy, and we can only solve so many problems at a time. Trust your first instinct! Listeners only have one chance to hear a story, and it's likely they have distractions while listening. If you, while listening closely, couldn't hear something well, there's no way a listener — going about her life, driving a car, walking down the street — will hear it.
- 4 Don't read the script during the first edit.** Reading along becomes a crutch. You think you're reading and listening at the same time, but you're crippling your ability to experience the story as a listener would. The temptation to stop listening is too great.

# Video Editing Basics

**Editing video is a mixture of visual and audio editing.** Be sure to read the audio editing tips to get a fuller picture of what is required for audio and learn more about video editing with the tips below.

- 1 Start with a rough cut.** Put the footage you want to use in chronological order in the time line, without much editing. Once you have the general timeline created, then you trim each clip, cut out all the unusable shots, and add alternate footage.
- 2 Avoid jump cuts.** You should cut out moments when interviewees say “um” and “uh” and stumble over their words. When you cut those moments out, you should layer b-roll over these edited moments. If you do this carefully, it will look like the speaker said things perfectly without a hitch.
- 3 Vary your shots.** Don't use the same shot for the entire video, vary it with other angles. This can be as simple as recording your interview with two cameras and switching between them.
- 4 Time your cuts well.** Your shots should last longer than 1 second. Static shots can last between 2 and 10 seconds. If there is a lot going on in the shot or somebody is talking, it can be longer. Switch between shot lengths, some longer shots and then some shorter ones.
- 5 Cut on motion.** Motion distracts the eye from noticing editing cuts. When cutting, try to do it when the subject is in motion. For example, cutting from a turning head to an opening door is smoother than cutting from a still head to a opening door.



- 6 Add music and sound effects.** Footage can bring a completely different message across if it is accompanied with appropriate music. Test different kinds of music tracks for your video and “feel” the difference.
- 7 Add lower third titles to your interviewees.** These titles are shown at the bottom part of the screen when someone is talking to introduce that person and give more information about them. Be sure to use legible fonts in easily read sizes for the titles.
- 8 Think about why you are using the shots.** Each shot you put on your timeline should have a purpose. If what is being heard doesn't match what is being seen, fix it. Only use the best shots.
- 9 Use transitions with a purpose.** Different transitions should be used for different purposes. Don't always fade in and fade out of everything. Don't use crazy transitions. Subtlety is the key.
- 10 Correct the color.** Color correction is usually the last step before a video is completed. You can use color correction to make the colors in your video appear more accurate, or you can use it to alter the mood of the film with color filters. Similar to a good soundtrack, well-colored video can complement and help set the mood of the story that you are trying to tell.
- 11 Be invisible.** If your viewer is thinking about the editing, it means something was jarring. The goal is to make your editing invisible.

# Free Audio and Video Editing Tools

**You don't need to invest in expensive editing tools to complete your project.** There are several powerful, free editing tools available for both Windows and Macs that should cover all your audio and video editing needs. If you do decide to spend money on editing software, do your research to find the best software for the price.

## Audio

**Audacity.** Audacity is a powerful multi-track recording app, and it's easy to use. Audacity allows you to record live audio, record from your desktop, convert old tapes/records, edit various formats, cut/copy/splice/mix audio, add effects, change speed/pitch, and much more. Despite all the professional-level set of features that Audacity has, the simplicity of its user interface is one of its most impressive features.

**Levelator.** Levelator is a software that adjusts the audio levels within your audio file for variations from one speaker to the next. It is a compressor, normalizer and limiter in one package. The user interface is as easy as it gets: drag-and-drop any WAV or AIFF file onto Levelator's application window, and a few moments later you'll find a get version with improved sound.

## Video

**Lightworks.** Lightworks is considered one of the best free editing programs out there. It features a beautiful user interface, a timeline, multi-camera support, and real-time video effects and easy-to-use trimming tools. Some features are easy, but it is a complex system and the support documents aren't very comprehensive.

**Blender.** Blender is more than an editor, it's an opensource, 3D animation suite, which allows for modeling, rendering, motion tracking, and more. On the video editing side, there are a ton of features, which means you can produce complex video projects. For the amateur video editor, all the functionality that's available can be a bit overwhelming.

**WeVideo.** WeVideo is one of the most widely used cloud-based video editing applications. This means you can produce and edit videos from an online interface. Most of the editing features are based on a drag-and-drop design and are very simple. Basic editing is free, but if you want access to more sophisticated editing features you will have to upgrade to their paid plans.

**VSDC Free Video Editor.** In addition to supporting nearly every major video format, the program offers advanced video effects, including object transformation and color correction, as well as advanced audio effects like volume correction. If you want technical support, you need to pay.

**Avidemux.** Avidemux is primarily Windows-based, and gives you options for basic editing. This includes easy clip splicing, as well as a host of filters. The editing tools are robust enough to ensure that your videos look professional. The application features an extensive online Wiki for an added layer of support as you learn to edit with the software.

# Intellectual Property Rights

**It is important to understand the laws governing the use of music and audio created by others.** Music and sound re-use are very restricted, so be sure to use care when choosing assets to use in your stories. Here is an overview of music copyright issues: <https://ucomm.wsu.edu/music-copyright>.

## **You Are Responsible**

You are the sole owner of your content. As such, you are responsible for being in compliance with Intellectual Property (IP) law. Ask yourself: Am I hindering the artist's ability to monetize this material by using it? If the answer is "yes," you are likely violating copyright.

## **Public Domain**

The only time you do not need to secure special permission to use audio is if it is original material or when that audio is in the public domain. Any song or musical work published in 1922 or earlier is in the Public Domain in the U.S. No sound effects recordings are in the Public Domain in the U.S., no matter how old those recordings are. Luckily there are many people who let others use their recordings for free. Several are listed on the next page.

If the audio you are using is not in the Public Domain, you need to obtain a license to use it.

## **Royalty Free**

Permission must still be granted for Royalty Free recordings and "Royalty Free" does not necessarily mean FREE – often you must pay a license fee.

## Fair Use

Fair use is a set of exceptions that limit the power of copyright laws and the use of the audio is deemed “fair.” To determine “fair use,” several factors are taken into account.

- The purpose and character of its use – whether it is being used in a for-profit product or for nonprofit educational purposes
- The nature of the copyrighted work – facts and ideas are not protected by copyright—only the way they are expressed
- The amount and substance of the portion used in relation to the copyrighted work as a whole – in general, the less used in relation to the whole, the more likely the use will be considered “fair”
- The effect of the use upon the profitability of the copyrighted work – do not infringe on the original creator’s ability to sell their work
- Acknowledgement of copyrighted source – it is best practice to acknowledge the source of the audio content

This *Fair Use Checklist* can help you decide if your use of the music, audio, or other content is considered “fair use”: <https://copyright.columbia.edu/basics/fair-use/fair-use-checklist.html>.

# Sources for Sound and Music

**All of these sites have different requirements for using their music and sound effects.** Be sure to pay attention to what those requirements are.

## **The Free Sound Project**

A collaborative database of Creative Commons Licensed sounds. You can also upload your own creations to the database. <http://www.freesound.org>

## **Bargus Sound Library**

A small sound library of high-quality royalty free sounds.  
<http://www.bargus.org/soundlibrary.html>

## **The Recordist Sound Library**

A collection of free sound effects in MP3 format for nonprofit use.  
<http://creativesounddesign.com/the-recordist-free-sound-effects>

## **SoundGator**

Free high-quality mp3 sound effects in various categories. The database has more than 400 wav sounds to download. <http://www.soundgator.com>

## **Sound Effects+**

Free high-quality sound effects recorded and designed by a team of audio professionals. <http://www.soundeffectsplus.com>

## **SoundJay**

Professional, high quality sound effects. <http://www.soundjay.com>

### **MuseOpen**

Provides access to recordings, sheet music, and textbooks to the public for free. The music collection is classical. <https://musopen.org>

### **Incompetech**

The site was created by composer Kevin MacLeod and has music categorized by genre and feel. <http://incompetech.com/music>

### **MobyGratis**

Moby has made over 150 tracks from his catalog of music available to licence for free, via a simple online application system. <http://www.mobygratis.com>

### **BeatPick**

A great selection of licensed music and if you are using it in a non-commercial or nonprofit production it's free. <http://www.beatpick.com>

### **PublicDomain4U**

Old music that is now in the public domain, but also more modern music that is free with artist permission. <http://publicdomain4u.com>

### **CCmixer**

CCmixer offers mashups of public domain songs under a Creative Commons license. <http://dig.ccmixer.org>





# STORYTELLING TOOLKIT



Publishing Your Project



Smithsonian  
Institution



**MUSEWEB  
FOUNDATION**

***This handbook will guide you in uploading your content to free and open platforms.*** There are many platforms to choose from, but in this handbook we are highlighting the most popular platforms for audio, video, and geolocated content. Popular platforms mean a larger potential audience for your content. Other platforms to think about uploading your content are WikiCommons, Tumblr, and Vimeo. There are many other free and open platforms, so if you have a favorite, upload your content there, too! And remember to upload your projects to the Museum on Main Street website as well (launching soon!).

# TABLE OF CONTENTS

## **PUBLISHING YOUR PROJECT**

Introduction	4
YouTube	6
SoundCloud	8
Clio App and Website	10
Smithsonian Stories from Main Street Website	12
Google's My Map	14
Wikimedia Commons	16
History Pin	18
Adding Your Project to the Community	20

# Introduction

**Whether you're an experienced storyteller or you're picking up a microphone for the first time, you may still have the same question, "Where do I post my story after I've created it?"**

In conjunction with our Be Here projects about place-based storytelling, we've used and reviewed a number of free platforms where storytellers can post their content.

## How-to Guides

We provide key tips how to use the platforms. However, the nature of online platforms is that they are ever changing. As a result, we encourage you to google online for how-to videos on each platform you are interested in using. Often these online videos, pictures or guides can explain much more than we ever could in this toolkit, and can be more easily updated by the individual platforms. If we have found an online guide we particularly like, we have shared the link, but if it does not work for you, there most certainly will be others.

## Project Parameters

MuseWeb's aim is to democratize cultural content, giving everyone an opportunity to document a place, event, or experience that has significance—historically or even emotionally. We're helping people record and share stories about American places and traditions that are rooted in experience and accrued knowledge, not just facts and dates.

Based on those project parameters, we researched free, third-party platforms that will host these types of stories. All of the platforms could work well, depending on your content/audience goals. Nonetheless, with our project goals in mind, this is how we ranked the platforms:

- 1 Ease of use-Is it techy?** Does it require advanced knowledge?
- 2 Shareability** – Can you share directly to social media?
- 3 User base** – Is there an audience? will your content will be seen?
- 4 Searchability** – Can you find your content once you've post it?
- 5 Story type** – Are there a variety of stories/content posted?
- 6 Geolocation abilities** – Can you pin your story to a location?
- 7 Accessibility** – Are there options for captioning, adding transcripts, does it work with the major accessibility programs, etc.?
- 8 Longevity** – Do we expect the platform be around the next couple of years?

**Read through the WHY of our ratings.** All of these platforms have utility and may be perfect for individual or organizational storytellers, depending on short-term and long-term goals. The highest rating is 5 stars.



**(4.5 out of 5 stars)**

**If your project is a video, you can upload it to YouTube.** YouTube is the largest and most popular online, free video sharing platform in the world. Once your video project is created, you can upload it to the site.

**PROs:**

- Easy for first-time users; No tech skills required
- Can share to major social platforms
- 1 BILLION active users
- Access to stats for free!
- Allows you to create playlists for various videos
- Offers additional videos for users when they play a similar video
- Works in tandem with Google's My Maps
- Ability to translate metadata into multiple languages
- Allows you to geolocate video location
- Very robust analytics
- No limits to number of videos you can upload
- Has withstood the test of time in the tech sense
- Allows for stories about everything!
- Has new geolocation abilities

**CONs:**

- Video Only
- Searchability–So many videos that yours can get lost unless the tags are very specific

## Why pick this option?

You want to upload an unlimited amount of free video content, are interested in access to detailed analytics, and want maximum exposure. Ease of use is paramount to you. You have a vested interest in the accessibility of your stories.

## Basic Steps of Uploading a Video

- Create a youtube or google account.
- Sign into your YouTube account (or google account).
- Click on “Upload” at the top of the page.
- Before you start, you can choose the video privacy settings.
- Select the video you’d like to upload from your computer.
- edit the basic title. Well-written titles can be the difference between someone watching and sharing your video, or scrolling right past it.
- Edit the description. You can think about the description as two parts - what viewers see before they click “Show more” and what they see after. Consider prioritizing the first few lines of your description to describe your video because it’s what viewers will see first.
- Edit the advanced settings of the video. Consider adding keywords as tags that your audience will likely use when looking for the videos.
- Click Publish to finish uploading a public video to YouTube. If you set the video privacy setting to Private or Unlisted, just click “Done” to finish the upload or click Share to privately share your video
- Learn more: <https://creatoracademy.youtube.com>

# SoundCloud



**(4.5 out of 5 stars)**

**If your project is an audio project, you can upload it to SoundCloud.**

SoundCloud is the world's leading social sound platform where anyone can create sounds and share them everywhere.

## **PROs:**

- Easy for first-time users; No tech skills required
- Can share to most major social platforms (Many social media platforms don't allow direct upload of audio files)
- 175 million monthly listeners
- Allows you to hear the latest posts from people you follow
- Great searchability for tags
- Unlimited description field for posting transcriptions of your audio content
- Allows you to make your content available via Creative Commons licensing
- Access to stats for free!
- Allows you to create playlists for various stories
- Accepts multiple file types, including .mp3, .wav. You can even upload a video file and it will extract the audio
- Has withstood the test of time in the tech sense
- Allows for stories about everything!

## **CONs:**

- Audio Only
- Can only upload 180 minutes of content for free. Pro account starts at \$7 per month



- No geolocation capabilities very specific

## Why pick this option?

You want to upload a limited amount of free content and get the maximum amount of exposure for it. Ease of use is paramount to you. You're interested in quickly retrieving and showing off your content.

## Basic Steps of Uploading a Audio File

- Create a user account. Soundcloud allows using your email address, google+ or facebook to create an account.
- Sign into your Soundcloud account.
- Click on "Upload" at the top of the page.
- On the Upload page, you can either click 'Choose file to upload' or drag and drop the file into the screen.
- Once you have selected your audio file, it will immediately start uploading and SoundCloud will transcode it to be streamable.
- While your track is uploading, you can add any additional track information, privacy settings, and sharing settings.

Think about adding album artwork as image (max 2mb) an original track title (up to 100 characters), tags (to help identify what kind of sound your track is, and makes it easier to find).

- Learn more: <http://help.soundcloud.com>

# Clio App and Website



**(4 out of 5 stars)**

**If your project is rooted in history, and want to make it locateable on a website as well as an app, you can upload it to Clio.** Though it has a small userbase, it is rooted in academia, and allows you to connect your content to other academically and professionally vetted content and locations.

## **PROs:**

- Easy to use without advanced knowledge
- Ability to share stories on multiple platforms
- Allows for upload of images, audio, video, text
- Presents geolocated point on embedded Google map
- Allows user to search for different types of locations and by distance from your current location
- Can be used to create connected walking or collections tours
- Content about a location or site can be edited or improved, much like Wikipedia model
- Includes a citation generator for help with crediting
- Mobile app available for exploring content on site

## **CONs:**

- Fairly small usage compared to other platforms, but platform is growing with content available in many cities across the U.S.
- Content must be reviewed by developer before posting
- Stories more historical in nature—not necessarily about experience

## Why pick this option?

You're telling stories about specific locations or historic sites. You believe in free and open content, and you'd like your content to be reused or used in study. Your content is about a building, natural resource, or historic site as opposed to a story about experiences, perceptions, memories. (Note: Those types of stories may be included as complementary content as it relates to a specific location.)

## Basic Steps of Uploading a Cultural History

- Log-in or set up a new account in Clio. Click on the green "Login/Register" button in the top right corner of the screen.
- Determine whether a museum, gallery, or historical landmark is already in Clio.
- If the location does not yet exist, click on the green "Submit Location" button. You must be logged in to see this button.
- After clicking on "Submit Location" we see this screen which allows us to enter the location of the historic site or museum.
- As a safeguard against duplication, you will be asked about nearby entries, and confirm they are not the same
- The next screen is where you enter all of the information. We recommend using a word processor to compose the more lengthy parts of your entry. You may also save your work periodically.
- This platform request all the sources you used to create the entry, photos, and links to relevant websites, articles, books, and media
- When you are done, click on the green "Create Entry" tab. That's it! New entries appear in draft mode until approved by an administrator.
- Learn more: <http://help.soundcloud.com>

# Smithsonian Museum on Main Street Website



**(3.5 out of 5 stars)**

**If you want to preserve your project in a national collection, you can upload it to Smithsonian's Stories from Main Street Website.** The Stories from Main Street Website is part of the Smithsonian Travelling Exhibition Service Museum on Main Street Program. It's goal is to collect stories throughout the United States.

## **PROs:**

- Longevity and security–story becomes part of a Smithsonian archive
- Easy to use and upload–no tech experience necessary
- Allows for all types of stories, both historical, personal and experiential
- Allows users to upload text, images, audio, and video
- Easy to navigate share function–Easily locate your content after upload
- Story narratives and transcription options increases accessibility

## **CONs:**

- Cannot share stories directly onto social media
- Must upload consent forms for minors if included in stories
- Doesn't include robust geolocation feature
- Website only, no current app in use
- Limited user base (website has only been live since November 2016)
- Stories are moderated and will be reviewed before posting

*Note: The Smithsonian partners with MuseWeb on the production of this toolkit as well as other digital cultural storytelling projects. Their website is still actively growing and improving, and functionality may be added over time.*

## Why pick this option?

If you want to add your story to be preserved in a long term archive and enter it into a Smithsonian collection, this is the website for you. You do not need to worry what form of storytelling you do, as the website accepts all kinds of forms: audio, video, text etc.

## Basic Steps of Uploading a Story

- Register and Login
- Once registered, you go to the Share Your Story Screen
- Fill out the form describing your materials
- Begin to upload your media and story. Up to 500 words describing your story narrative and up to 5 media files of images, video, or audio.
- If materials include minors an additional release form needs to be uploaded.
- Review your submission and agree to the terms of service
- Receive an email indicating that you've submitted your story and it is being reviewed.
- Once story has been approved by staff, you receive an email saying "congratulations" with a link to your story.
- Learn more: <https://museumonmainstreet.org/stories>

# Google's My Maps



**(3 out of 5 stars)**

**If your project -at its core- is related to points on a map, you can use google's My Maps.** Using google's powerful mapping software, you are able to create your own points of Interest, and even link them to some of the other platforms mentioned in this toolkit.

## **PROs:**

- Allows you geolocate your story; draw lines; add photos to a map point
- Google's usage is ubiquitous. Users are comfortable with the interface
- Can be shared to Facebook, Twitter, Google +, email
- As a Google product, it has a higher probability of long-term sustainability
- Ability to import Google images into pins
- Since it's only a link, the story link can be about anything

## **CONs:**

- Not as easy for first-time users. No tech skills required, but platform not entirely intuitive
- Cannot add audio files to pins—only videos or links to YouTube
- While everyone uses Google Maps, YOUR pins and YOUR map content doesn't come up in the general search. The idea here is that you'd create a map to locate your story and then share the link to your map.
- Not as accessible as other platforms, though description fields are available for annotations

## Why pick this option?

You want to visually show content on a map. You already have content on YouTube and want to easily connect the two. You want to upload an unlimited amount of free content. You are already tied into everything Google.

## Basic Steps of creating a My Map

- Create Gmail or Google+ account
- go to [mymaps.google.com](https://mymaps.google.com) and login with your google account
- Click Create a new map.
- In the left panel you can name your map, add layers, change your map icons and more.
- using the location marker button, You can create points on the map using gps coordinates, addresses or simply scrolling around the google map and dropping a pin.
- Once you dropped the pin, you can add pictures, youtube videos, or links to other platforms like soundcloud. you are also able to add a discription.
- After you finish creating the point of interrests on your map, you can share the map and chance the map settings from “private” to “public” and share with anyone or embed it on a website.
- Learn more: <https://www.google.com/maps>

# Wikimedia Commons



**(3 out of 5 stars)**

**If your projects goal is to create a creative commons archive anyone can access, use and reuse.** Wikimedia Commons, known for of course Wikipedia, is world's largest crowd sourced encyclopedia of information. Due to its mission, large userbase and goals, it is also a platform with certain longevity.

## **PROs:**

- As a branch of Wikipedia, this platform has staying power
- Includes options for an infinite amount of metadata
- If tagged correctly, search function works well
- Geolocation capabilities
- Over 30 million files uploaded
- Easily allows you to make your content available via Creative Commons licensing
- Feels more like a "traditional" database for archiving content
- Accepts video, images, and audio and allows for unlimited descriptions
- Stories can be about anything!

## **CONs:**

- More techy than other platforms noted
- Category tagging is complex
- Only accepts .wav audio files
- Isn't a direct share on social media but does generate shareable links



## Why pick this option?

You're already familiar with Wikimedia in all its forms, or have an interest to learn more about it, and willing to spend the time to learn the techy environment.

You believe in free and open content, and you'd like your content to be reused or used in study. You're interested in posting content for the long haul.

## Basic Steps of Uploading a Story

- Create a user account. You need an account on Wikipedia or Wikimedia Commons to upload files.
- Images that you upload to Wikimedia Commons have to be educational and freely licensed.
- Go to the Upload Wizard on Wikimedia Commons. There is an upload file link in the menu on the left of the page.
- Click Select media files to share and find the image or images you want to upload on your computer.
- Click Continue and select the options that apply to your upload, as prompted. When you are done, click Next
- Organizing and describing your upload
- Enter a title for the image. Use plain, descriptive language. Then enter a description of the image and the date it was created.
- Help organize Wikimedia Commons by assigning categories to your file. When you are done, click Next.
- After this, your upload will be published and complete.
- Learn more: [https://commons.wikimedia.org/wiki/Commons:First\\_steps/Uploading\\_files](https://commons.wikimedia.org/wiki/Commons:First_steps/Uploading_files)



**(3 out of 5 stars)**

**If your project is an audio project, you can upload it to Historypin.**

SoundCloud is the world's leading social sound platform where anyone can create sounds and share them everywhere.

**PROs:**

- Robust map search function allows you to select pins on the map to view
- Is a very social platform: Allows posting directly into social platforms; Like Pinterest, allows users to repin content; Can favorite content
- Large user base: 85,730 members are working on 27,844 collections and have made 33,536 comments
- Platform has been around for a while and seems to have staying power
- Allows users to create collections
- Content about a location or site can be edited or improved by community

**CONs:**

- A Not as user friendly as Clio. Though visually stunning, the user interface is a bit confusing
- This is a more visual platform—making the best use of text and image. If pinning audio or video, you must do so through YouTube. (If pinning audio, YouTube requires you to convert the files to a slideshow.)
- Because of its focus on the visual, is not as accessible a platform.
- Stories more historical in nature—not necessarily about experience
- From their FAQ site: “We only “pin” things that have a specific date and location as this makes things easy to find and more useful for users.”
- A desktop experience: No mobile app currently in use
- Keyword or tag function often yields no results

## Why pick this option?

Why pick this option? You want to upload a collection - or multiple collections- of historical content that and it important to view on a map. it has a reasonable large user base, and appears to be a stable platform that will not dissappear overnight.

## Basic Steps of Uploading a Story

- Create a user account. On any page of thewebsite, click 'Join'.
- If you have a Google account, use you account and password to login. If not, click 'Register now'. This will open a new tab where you can go through the process of setting up a new Google accout.
- To pin content, from anywhere on thesite, click 'Pin'.
- Decide to upload photos, video, or audio, and click the approrpate icon.
- Click 'Add File' or alternatively simply drag files into the box.s
- When you see a green tick, your content has uploaded. you can then Pin to Map, to add information to your content. or Pin Later, to simply save content to your profile.
- You can then add a description, information about the license you would like your content to have, and add information about who created the content, and link if it is stored elsewhere.
- Also, here add a Date, or tick the box "I am not sure". You will be asked to give an estimate.
- there are also options to add your photograph to streetview.
- Learn more: <https://www.historypin.org/how-to/>

# Adding Your Project to the Community

**At the end of your audio piece, your video, or your tour, please include a way for others to connect your stories to many others that are part of a larger storytelling initiative.**

The following line can be read or written into your content:

*This [tour, video, or whichever format] was made for Be Here: Main Street, a program created by the MuseWeb Foundation, in collaboration with the Smithsonian Institution Traveling Exhibition Service (SITES).*

It's also a great idea to include the hashtag, **#bHereMainSt** in your description, keywords, or tags. This is a way for anyone to explore the richness of the stories submitted on various platforms, whether they are on YouTube, SoundCloud, Facebook, or izi.Travel. Please add the hashtag (**#bHereMainSt**) in your content, perhaps as the last frame in your video and in the textual description. From a practical point of view, including the hashtag is an important way for you to track your own content, related content, and to respond to what others may be saying about your story on social media.

If you'd like to alert Museum on Main Street and MuseWeb about your fantastic, newly posted content, please add our handles to your social media content, and be sure to use the **#bHereMainSt** hashtag.

## **Facebook**

<https://www.facebook.com/museumonmainstreet>

<https://www.facebook.com/museweb>

## **Twitter**

[@museumonmainst](https://twitter.com/museumonmainst)

[@museweb](https://twitter.com/museweb)



# STORYTELLING TOOLKIT



Marketing Your Project



Smithsonian  
Institution



**MUSEWEB  
FOUNDATION**

***This handbook will guide you in marketing your project.*** Once your content is created and published, it's time to get the word out! There are so many ways to do so – traditional media, social media, onsite promotion, and more. Use the tips and examples in this handbook to help plan and execute your promotion.



# TABLE OF CONTENTS

## **MARKETING**

Social Media	4
Traditional Media	6
Other Tour Promotion Ideas	8
Approaching businesses in your community	10
Sample Promotion Plan – Hometown Teams	12
Sample Promotion Plan – Continued	14
Social Media Plan Template	16
Sample Press Release	18
Code of Conduct	20

# Social Media

**It's time to get the word out and get people to use your content.** One of the main ways you can market your finished project is through social media. Here are few tips to help you create effective social media posts.

**1 Post insider information.** Think ahead while you are creating your project. Take pictures and videos of the behind-the-scenes action while creating your project. Use this content on social media to promote your finished product.

**2 Embrace the visual.** Tweets, Facebook and LinkedIn posts with images get more engagement. Pinterest, Instagram, and Snapchat are based entirely on images. Create a branded “featured image” to share with your post, but also create separate images for each of the main points in your content so they can be shared when you repeatedly post them to social media.

**3 Customize for the platform.** When sharing content, utilize the customizable posting features on each social media platform – this includes the headline, image, and a description of the content you are sharing. The more optimized your post is for a particular platform, the more effective your promotion will be.

**4 Share at the right time.** For maximum engagement, the content you're sharing needs to reach as many people as possible, so you have to go where the crowd is – and when they are online and active. Keep in mind that different social media platforms may not have the same peak times.

**5 Pay attention to anniversaries and current events.** Make a list of special days (like World Water Day) and anniversaries of historic events so you can post related content on those days. Also watch the headlines for ways to link your content to what's happening locally and nationally.

**6 Post multiple times.** Numerous studies suggest you will be more effective by promoting the same content multiple times on social media. With multiple images and multiple headlines for your content, you can engage with your followers without them even knowing a link is to the same content you posted earlier. As social media users don't see most of your social media posts on any given day anyway, consider posting multiple times to social media as a way to ensure your audience has a chance to see your content.

**7 Use keywords in your posts.** Don't underestimate the power and effectiveness of social search. Sites like Facebook, Twitter, Pinterest and other social networks have search features that operate just like search engines.

**8 Capitalize on hashtags.** We've all seen hashtags in social media (#Rio2016 or #TheVoice). Hashtags are a way for you to categorize content on social media platforms. If you search for a specific hashtag inside a social media platform, you see every post that has used that hashtag. Hashtags are one of the best ways to organically expand your reach on social media. In order to expand your reach and get more impressions for your posts and tweets, start incorporating hashtags. Inserting random hashtags isn't going to be as effective as taking a strategic approach.

# Traditional Media

**When done well, traditional media can reach a wide audience – whether on TV or through other news sources like newspapers.** Consider sending press releases to daily and weekly newspapers, radio and television stations, community and association newsletters, and school/PTA newsletters. Here are a few tips to help you reach out to these more traditional media outlets.

- 1 Pitch a compelling story.** If your story is not unique, there's no reason for editors and publications to cover you.
- 2 Provide a human connection.** If you have a human connection to your story – a success story, an impacted life, or another human interest angle – your story is more likely to get picked up.
- 3 Pitch to the right person.** Research the media you are pitching to to ensure you are sending your press release or calling the reporter that would be most interested in writing about your story. Don't pitch a human interest story to an investigative reporter or a social justice story to a fashion reporter.
- 4 Get to the point.** Most reporters get a lot of pitches and press releases in a day. Make sure your press release or email is clear and to the point. Tell the story of why it's important to the writer's audience within the first sentence.
- 5 Be prepared.** Be ready to answer questions. Prepare your pitch as if the reporter will run it immediately. The less groundwork reporters need to do the more likely they will use it. Give reporters facts, figures, photos, video, trends and your contact info.

- 6** **Be accurate.** Make sure that your story is accurate and not overhyped. Tell the story with nouns, verbs and facts, not adjectives. Inaccuracies or misuse of facts will likely damage your relationship with the journalist.
- 7** **Time your pitch appropriately.** Some media outlets need several weeks or even months notice to write stories. Don't pitch those outlets on the day of your event. Many media outlets, magazines and blogs publish annual editorial calendars of the topics they plan to cover. Check them.
- 8** **Practice.** Practice your pitch several times before contacting the reporters. Reciting your pitch aloud a few times to yourself or someone else can help you sound less scripted and more natural – and make you feel more comfortable in delivering your pitch to journalists.

# Other Tour Promotion Ideas

**Make sure your content is advertised to the people who would be most interested – your visitors.** If your organization creates a local tour, or wants to promote a local tour to your visitors, here are a few suggestions:

## **Links on websites**

Promote your stories on your website. The two best places to link to your tour are the homepage and the visitor information page. Ideally include a banner for extra attention. You can also create a separate page with links to your tour(s). If you do, include the word audio guide or tour in the url (like [www.museum.org/audiotour](http://www.museum.org/audiotour)) to improve the search results in Google.

## **Add online platform icons to your social media icons**

Most online publishing platforms are forms of social media. After your stories are published, place the icon of the platform used next to other social media icons on your site and to the user profile where your stories are published.

## **News item or blog post on website**

Announcing a free mobile audio guide is great content for your news section and for a blog post. You can link to your tour on the izi.TRAVEL website, but you should also link to the app in the app store, so people can download it and experience your content as they walk around with their phones.

## **Sponsors or Partner Promotion**

Find partners to promote your guide/tour like hotels, local businesses, tourist organizations, etc. If your tour had local or national sponsors, ask those sponsors to announce your tour to their staff and customers. You can also ask your local tourist authority to promote your tour on their website, social media and place postcards in their headquarters.

## **Cross links**

Cooperate with nearby museums/tours and link to each other's content from your content. This way, their visitors can see your content and vice versa.

## **Article in e-newsletter**

Announce the tour in your newsletter. Remind your subscribers several times a year, especially if you add new content.

## **Landing page for WiFi**

If your organization offers wifi, make a landing page – the web-page where the visitor will be forwarded automatically immediately after connection to the WiFi – that links to your tour.

## **Print Takeaways**

Put your free mobile tour in all on-site materials - even your tickets! You can also create small, business card size cards to put on the counter that promote the tour and contain the tour's QR code and links to download the app. izi. TRAVEL has easily customizable designs: <http://academy.izi.travel/help/promotion/promotion-kit/>. Or you can use free software like *Canva* to create your own: <https://www.canva.com>

## **Floor sticker**

You can also place a large sticker on the floor that advertises the tour.

## **Green graffiti**

Looking for a creative outdoor idea? Try using green graffiti – like chalk graffiti – to advertise the tour. Perhaps even in the locations featured on the tour.

# Approaching Businesses in your Community

**Getting local businesses involved ensures that local businesses involved ensures project reach beyond the cultural field.** While contacting random businesses may be daunting, here are some tips on how to start:

**1 Know the business landscape.** Ask yourself “Who are the top 20 employers in your city?” These are the businesses that rely on your community as a source of talent, for services for their employees, for word-of-mouth reputation, and for civic buy-in regarding their presence and growth. They likely want to be seen as part of their community.

**2 Create your list.** Make a two-column list: one column “B2B” and one column “B2C.” Sort each employer into the appropriate column by asking, “does this company sell its product or service to other companies or to individual people?” If a company sells to companies, its business model is called B2B (business to business). If it sells to individuals, it’s called B2C.

**3 Undertand the relationships.** It’s important to understand that an employer may have different relationships with its community based on its business model. Your job as a community partner or sponsored prospect/recipient is to determine what type of relationship(s) that company wants to have with its community.

**A.** B2B businesses’ products and services are sometimes less obvious to the community member than B2C products and services.

**B.** B2B businesses sometimes have higher profit margins than B2C businesses.

**C.** These two factors together can make B2B businesses better sponsorship prospects, provided you can figure out who you should speak with at the company, and whats in it for the company to sponsor community based projects.



## Know the connections

We know the companies we want to target but who should we talk to?

**4 Start with Connections.** Go down the list and ask the group if anyone has a connection with that company. Warm introductions are the best place to start. Often, someone who works at the company can address these questions...

**5 Community engagement officers.** Find out if the company has a Community Engagement Officer or a Foundation? This is often the best point of contact for your “discovery” meeting.

**6 Contact the marketing department.** If you don’t have luck with step 4 or 5, would someone in the marketing department be willing to take a 15 minute meeting with you? In making the request, align your project’s values and their company values: positive community impact.

**A.** Practice the description of the BH Main Street project so that you can concisely describe it in 90 seconds or less. Time it! This is your elevator pitch (or in business speak, your “value proposition” in terms of how you impact the community.)

**B.** State that you are scheduling meetings with the businesses in your community as your “discovery process” in forming corporate partners and corporate sponsorships.

**C.** State that “you and your company were recommended because of (x, y, z).” Be sure to include any connections you made by going through the above process.

# Sample Promotion Plan – Hometown Teams

Baseball. Soccer. Hockey. Bowling. Kickball. Surfing. People around the country are drawn to compete in these sports and many others. Still more gather on the sidelines to cheer for their favorite athletes and teams. Nowhere do Americans more intimately connect to sports than in their hometowns. The Smithsonian’s Museum on Main Street (MoMS) program will celebrate this connection in the new traveling exhibition Hometown Teams: Sports in American Communities.

A partnership of the Smithsonian Institution Traveling Exhibition Service and state humanities councils, MoMS will travel five copies of “Hometown Teams” on simultaneous year-long tours of Idaho, Illinois, Nebraska, New Jersey and West Virginia beginning in January 2014. Over the course of six years, the exhibition will travel to 180 small towns in 30 states.

## OBJECTIVES

- Generate nationwide interest and participation in national tour of exhibition
- Generate national exposure and visibility for MoMS
- Generate state and regional exposure for the State Humanities Councils

TARGET MEDIA	TARGET AUDIENCE
National Print/Broadcast – general, travel, family, entertainment, sports	Families – sports are a huge part of American life and family activities.
Online and social media – general news, travel, sports	Sports fans
Regional broadcast, print and online media in host museum locations	Young Professionals

## **MEDIA, TACTICS, AND STRATEGY**

### **Story Angles**

Identification of possible story angles for the exhibition, plus Smithsonian and exhibition curator for media interview.

- Sporting tradition, a family affair, backbone of a community
- Super Bowl – Feb. 2

### **Visuals**

Selection of promotional imagery and film footage created by MoMS team

### **Promotional Materials**

Development of materials including press kit contents (press release, PSA script, thumbnail image caption sheets, factsheets, calendar listings, etc.). A quantity of large-format postcards and will be supplied to host communities to ensure brand identity.

### **Long-lead Press Announcement**

- Announcement of first venues on national tour
- Launch of social media outlets

### **Press and Public Opening at Host Museums**

SITES will work closely with the host museum on their promotional plan to determine if any public programming or local stories can be expanded to a national story.

# Sample Promotion Plan – Continued

## Media Outreach

MEDIA TYPE	EXAMPLES
National newspapers	New York Times, USA Today and Wall Street Journal, Associated Press
National general interest, family and entertainment magazines	Good Housekeeping, Nat Geo Kids, Smithsonian
Special interest publications including film, youth, student and sports	Sports Illustrated, SI for Kids, ESPN, ESPN Deportes
National Broadcast Media	NPR, network morning news programs, CBS Sunday Morning, ESPN's The Garage, GMA (Lara and Josh both college past college athletes), Voice of America
Regional newspapers in host cities	including entertainment, lifestyle, arts, news, kids/family, sports writers

## MESSAGING

### Key Messages:

- Sports as metaphor for pride & community
- MoMS is the face of Smithsonian in small town America.
- 20-year-old outreach program that presents the SITES' museum quality exhibits in local community venues, with each exhibit celebrating and exploring local heritage within the context of a broad national theme.
- MoMS has collaborated with more than 900 institutions in towns across the nation. Each community rallies around the exhibit to bring it to life in a way that resonates with local and regional residents, celebrating their history and culture. Communities make discoveries and connections, bridges cultural gaps. Bringing people together, thinking in new ways, discovering their unique position within the U.S.

## Sub messages:

- MoMS develops exhibits meant to stimulate thought and conversations that instill both pride and awareness about a community and its impact.
- MoMS carefully identifies and embraces broad exhibit themes that resonate in every community and reflect the spirit of America.
- In 2014, MoMS launched “Hometown Teams.” The exhibit showcases the connection between towns and their teams. The exhibit will showcase the sports, individuals and artifacts that have been an indelible part of every community, for well over one hundred years.

## SPOKESPEOPLE

### Smithsonian

- Carol Harsh, Director, MoMS
- Robbie Davis, Project Director, MoMS
- Bob Santelli, exhibition curator – Director, GRAMMY Museum

## SCHEDULE

DATE	TASK
September 2014	Draft press release, fact sheets, image captions and other press materials
October 2014	Compile local programming information
November 2014	Announce launch of tour
January 2014	Press Preview and Public Opening at First Host Museum

# Social Media Plan Template

**Primary goal of campaign:**

**Secondary goal of campaign:**

**How will you measure the goal you wish to achieve?**

**Example goals:** To drive traffic to your website; to sell tickets to an event; to raise awareness for an exhibition opening; to increase shares, likes, or comments on a specific channel; to build your membership base; to gain museum volunteers; etc . . .

**Measuring your goals:** Think about using tools like Facebook Insights or Twitter Analytics to measure overall reach, or new followers added, or the number of engagements—likes, shares, comments. If measuring web traffic, set up a Google Analytics account to track the users coming to your website from your social media posts.

**Things to think about:**

- Who is the audience? (Age, gender, location)
- Based on audience, what's the best platform for the campaign?
- Will multiple platforms be used?
- Who on staff will work on the campaign?
- What are the proposed dates of the campaign?
- Do the dates coincide with a local, state, or nationwide initiative?
- Will the campaign have a specific hashtag? Check the hashtag for previous use.
- Which local/national partners can you ask to share your content?
- Will you use paid ads from Facebook, Twitter, Google Ads or another service? (Facebook ads are effective and can be very inexpensive.)
- Share information about the campaign with staff members.
- Ask staff members and friends to share content on their accounts.

- What times make most sense to post for your intended audience?
- Do you have a specific url? Track it using sources such as bit.ly
- What's the tone of voice of the campaign? Serious, light-hearted, professional, socially aware, etc.

### Resource links:

<http://blog.hootsuite.com/how-to-create-a-social-media-marketing-plan/>  
<http://marketingland.com/4-components-best-social-media-campaigns-140715>  
<http://coschedule.com/blog/social-media-strategy-template/>

### Create sample posts for others to review:

DATE	PLATFORM	TEXT	IMAGE
February 18	Twitter	Missed our Valentine's series? Visit #TheCuddlyMuseum and swim in the adorable sweetness. <a href="http://sfy.co/u2qb">http://sfy.co/u2qb</a>	Valentine's image

### How We Did:

GOAL	STATS	ANALYSIS	LESSONS LEARNED

### Tips for Ensuring Success:

- Ask for help sharing the content from partners in your area.
- Write and schedule the content ahead of time using a scheduling tool such as Hootsuite or the Facebook scheduler.
- Collect your data as soon as possible after the campaign is over.
- Look at timing. When are most of your followers online?
- Be available to like, thank, or respond to people on social media.

# Sample Press Release

## IMMEDIATE RELEASE

Media Inquiries: [Your Name]

Local Contact: [Your local press contact, phone/email]

Smithsonian Contact: Jennifer Schommer; 202.633.3121;

## [Our local museum] to Partner with the Smithsonian Institution and the MuseWeb Foundation to Capture Local Stories

Date, 2017 (City, State)—The successful partnership between the [INSERT YOUR MUSEUM'S NAME] and the Smithsonian Institution will continue over the next year. The Smithsonian's traveling exhibition "Water/Ways", which opened [insert dates], is only the first element of a multi-tiered project that brings together [INSERT YOUR MUSEUM'S NAME], the Smithsonian, and the Maryland-based non-profit MuseWeb Foundation. Called *Be Here: Main Street*, the goal of the initiative is to record and publish local stories about Minnesota's abundant lakes, rivers, and streams.

Part of the MuseWeb Foundation's larger *Be Here* initiative which began in Baltimore, Maryland, earlier this year, the project's ultimate objectives are not only to collect rich stories about America's towns and waterways but also to connect people, businesses, communities, and cultural institutions through storytelling. MuseWeb, the Smithsonian, and their local partners believe that everyone has a story that's worth sharing—whether that story is about childhood memories on the water, a local landmark or business that relies on the bounties of water, a popular lakeside park or recreation area, a waterfront landmark or cultural site, the conservation and sustainability of local waterways, or simply a personal philosophy about a beloved river. These rarely heard, location-specific stories are likely to capture a "history" of America's waterways based on experience, knowledge, and memory rather than textbook dates and facts. In this way, the stories offer people a rare and authentic glimpse of the history, traditions, and culture of a community.

"This is particularly relevant since communities are looking for innovative ways to bring people downtown, out to historic sites, or to other points of interest. In many cases, a town's economic success is tied to natural resources and a thriving cultural sector," says MuseWeb Foundation director Nancy Proctor. *Be Here: Main Street* strives to forge new connections between government, local businesses and cultural institutions. Such partnerships create guided pathways between places in the community that stimulate culture, tourism, and economic activity.

The stories will be published on open platforms like YouTube and SoundCloud [INSERT ANY PLATFORM YOU PUBLISH STORIES ON]. On all these platforms, the stories are free to access, and it's also free for local storytellers to upload their own content, tagged with "*Be Here: Main Street*."

- MORE -



The Minnesota Humanities Center has also been involved with this effort and has already collected dozens of water-based stories that will be included under *Be Here: Main Street* umbrella. "So far, people have been sharing rich personal stories about camping on their favorite rivers, about conservation efforts in their communities, and about memories of sailing and picnicking," says Robbie Davis, Smithsonian project director for "Water/Ways."

The next time you hit the water, think about recording your own water story and adding it to the pool. Listen to a few of the stories from people like you at <https://izi.travel/en>. Search for "[insert state name]".

### **About the Smithsonian Institution Traveling Exhibition Service (SITES)**

SITES has been sharing the wealth of Smithsonian collections and research programs with millions of people outside Washington, D.C., for more than 60 years. SITES connects Americans to their shared cultural heritage through a wide range of exhibitions about art, science and history, which are shown wherever people live, work and play. Exhibition descriptions and tour schedules are available at [www.sites.si.edu](http://www.sites.si.edu).

### **About MuseWeb**

The MuseWeb Foundation is a new nonprofit offshoot of the international Museums and the Web Conference (MW), which began in 1997. In 2014, Museums and the Web brought more than 600 leaders in cultural innovation to Baltimore for its annual North American conference. For the past 20 years, MW has showcased and documented leading work in the cultural field in a free and open archive of more than 1,000 conference papers. The MuseWeb Foundation was conceived as an accelerator of cultural innovation to help develop and fund some of the most promising projects and initiatives from the conference and the cultural heritage field at large. *Be Here* is the flagship project of the foundation. Learn more about the *Be Here* initiative: <http://www.museweb.us/behere/>

### **About [YOUR INSTITUTION]**

[IF RELEVANT YOU CAN ADD A SECTION ABOUT YOUR OWN INSTITUTION OR ORGANIZATION HERE]

###

# Code of Conduct

\_\_\_\_\_ is dedicated to providing a harassment-free experience for everyone, regardless of gender, gender identity and expression, age, sexual orientation, disability, physical appearance, body size, race, ethnicity, religion (or lack thereof), or technology choices. We do not tolerate harassment of participants in any form. Sexual language and imagery is not appropriate for any venue or platform, including talks, discussions, Twitter, Facebook, and other online media. Participants violating these rules may be asked to leave or have their comments and submissions deleted at the discretion of the organizers.

*Thanks to The Ada Initiative for developing this open code of conduct and sharing it with a Creative Commons Attribution license.*

**Use the code of conduct on the opposite page (page 18) to set boundaries for any event or online discussion your organization hosts. You can put the code of conduct on your website and link to it from the social media profiles of your organization. You can also hand out a printed version or have a sign at any hosted event at your organization.**



# STORYTELLING TOOLKIT



Facilitated Dialogue



Smithsonian  
Institution



**MUSEWEB  
FOUNDATION**

***This handbook provides basic grounding in the methodology behind facilitated dialogue programs.*** This includes crafting evocative questions, the use of appropriate dialogue techniques, and suggested facilitator responses. This handbook is rooted in methodology utilized by members of the *International Coalition of Sites of Conscience*, a worldwide network of more than 200 places of memory dedicated to remembering past struggles for justice and addressing their contemporary legacies. Aiming to move visitors beyond passive learning. Sites of Conscience use facilitated dialogue as an interpretive strategy to enable visitors to better access larger historical and humanities themes within their exhibits, tours, programs, and social media.

# TABLE OF CONTENTS

## **FACILITATED DIALOGUE**

What is Dialogue?	4
What is a Facilitator?	6
The Four Phases	8
Facilitation Techniques	10
Troubleshooting	12
Sample Questions	14
Facilitated Dialogue Observation Form	16
Facilitated Dialogue Participant Survey	18
Code of Conduct	20

# What is Dialogue?

**Through facilitated dialogue programs, host sites for the exhibition can tap into the power of the exhibition to open new conversations about difficult subjects that surround the content.**

Dialogue stems from the Greek words “dia” and “logos” or “through words.” It is a mode of communication, which invites people with varied experiences and often differing perspectives to engage in an open-ended conversation toward the express goal of personal and collective learning. It requires participants to move beyond surface assumptions that inform their beliefs and actions and keep an open mind, suspending their judgment of the opinions of others.

Dialogue acknowledges that there are different “ways of knowing” about any given subject. It grants equal value to the insights drawn from personal experience and the knowledge gained from study. Dialogue assumes that it is possible for two markedly different perspectives to coexist at the same time.

The process of dialogue requires participants to establish and nurture a culture of mutual trust and openness. Facilitated dialogue refers to a process “led” by a neutral facilitator. Facilitators use a combination of questions, techniques, activities and ground rules to ensure that all participants can communicate with safety and integrity. Because dialogue is a non-hierarchical mode of communication, facilitators also uphold equality among all participants.

A facilitated dialogue can occur either after a shared experience (for example, a visit to the exhibition), or dialogue questions can be asked throughout the shared experience at appropriate moments.



## **Dialogue vs. other modes of communication**

**Conversation.** Sharing information and ideas in order to express one's views without any intended impact on the listener.

**Discussion.** Sharing information and ideas in order to accomplish a task.

**Debate.** Sharing information and ideas in an effort to bring others into agreement or alignment with one's position or belief.

**Dialogue.** Sharing ideas, information, experiences, and assumptions for the purposes of personal and collective learning.

© Tammy Borman & David Campt

# What is a Facilitator?

**The facilitator is essential to helping participants engage with the topic and each other in a productive way.** Facilitators use the context of the exhibition along with questions, techniques, and activities to allow the group to better explore issues of immigration, identity, race, and social justice.

## **Who makes a good facilitator?**

Facilitators can be found amongst your staff, board, volunteers, or community stakeholders. When considering who could make the strongest facilitator, look for people who:

- Equally value emotional, intellectual, and spiritual ways of knowing
- Exhibit a natural spirit of inquiry and curiosity
- Listen intently while reserving judgment
- Are aware and reflective about their own identity/identities
- Have organized but flexible ways of working and thinking
- Show patience with diverse learning processes and learners
- Hold themselves and other accountable for behaviors and attitudes
- Are aware of their body language and exhibit a non-defensive posture

## **Responsibilities before the program:**

- Familiarize yourself with the exhibition content
- Choose appropriate facilitation technique (pgs. 10-11)
- Create agenda and accompanying materials

## **Factors to consider in planning:**

- The number of participants
- The nature of the topics under discussion
- The type of involvement people need to have
- The background and positions of the participants
- How well they know the subject – and each other
- The time you have available

## **Responsibilities during the program:**

- Maintain group safety by setting the proper tone for dialogue and promoting an environment that encourages openness
- Create and sustain a spirit of inquiry in the group
- Identify conflict and lead the group through it
- Facilitate dialogue without imposing their own beliefs or perspectives
- Remain flexible and allow a natural dynamic to occur within the group
- Ensure equality within the group and break down hierarchies
- Ask probing questions to encourage deeper individual exploration and the identification of larger truths
- Synthesize the main ideas that emerge during the dialogue

## **Responsibilities after the program:**

- Have the participants evaluate the program using a custom evaluation or the one found at the back of this handbook.
- Review the evaluations and create a report to inform future facilitated dialogue programs.

# The Four Phases

## **Phase One: Community Building**

Encouraging connectedness and relationship building within the group. The work done here creates of a safe space where all participants can engage. Complete introductions and use questions to get to know the participants.

### **As the facilitator, take several key steps to begin:**

**Welcome the participants.** Introduce yourself and explain your role as facilitator, emphasizing that you are not an expert on the content, but have been charged with helping everyone find their place in the conversation.

**Explain the purpose of the dialogue.** Emphasizing the goal to arrive at a fresh meaning about a topic by hearing from and engaging with each other.

**Establish some guidelines.** In order to make the dialogue as productive as possible, the group should agree upon and establish some guidelines for the dialogue. If time does not allow for the group to generate its own guidelines, the facilitator can suggest guidelines that the group can consider using.

### **Example Guidelines:**

- Listen fully and respectfully
- Make space for all voices to be heard
- Seek first to understand—ask questions to clarify, not to debate
- Stay open: we are all free to change out mind
- Speak for yourself, not as a representative of any group
- Make and effort to suspend your own judgment as you listen to others
- Encourage participation from all the voices in the room by asking them to introduce themselves and respond to the same question

Getting all the voices in the room does not necessarily mean that every participant must always speak. Facilitator can consider using small group introductions or written techniques such as “graffiti wall” or indexed thoughts, both of which are described herein.

## **Phase Two: Sharing our own experiences**

Inviting participants to think about their own experiences related to the topic and share these experiences with the group. Use questions to welcome each person’s experience equally and place minimal judgment on responses. The facilitator helps participants recognize how their experiences are similar and different and why they may be that way.

## **Phase Three: Exploring Beyond Our Own Experiences**

Encouraging participants to dig deeper. Use questions to explore the topic beyond personal experiences, to view topics from the perspective of others. Until this point, participants speak primarily from their own experience. Provoke participants to dig deeper into their assumptions and to actively consider the underlying social conditions that inform a person’s perspective.

## **Phase Four: Synthesizing and Closing the Learning Experience**

Building a sense of community among participants. Use questions to help participants examine what they have learned about themselves and each other share the impact that they dialogue has had on them.

Facilitators are not working toward resolution or agreement. Some participants will actively seek this agreement. In these instances, facilitators should work to remind participants that the goal of this dialogue is to deepen personal and collective learning, not to encourage compromise or accomplish a specific task.

# Facilitation Techniques

## **Pair Share or Small Groups**

Some participants may be hesitant to share or speak before a large group. Dividing them into smaller groups or pairs may encourage more involvement. This also allows multiple people to answer a given question simultaneously. Facilitators should encourage groups to share what they discussed, allowing groups to learn from each others' conversations.

## **Serial testimony**

Serial testimony is useful where one or more participants are dominating the conversation. The facilitator establishes a time limit for each participant to answer a question. As each person speaks, the group is invited to listen silently without asking questions. If a participant does not fill their time, the group is invited to maintain the silence so as to allow for reflection and processing.

## **Quotes**

This technique invites participants to consider multiple perspectives on an issue by using a series of attributed quotes related to the topic. The facilitator hangs the quotes, typically five or six around the dialogue space and asks participants to read them silently. Then participants stand near the quote that they would like to speak about. Participants are then encouraged to discuss why they chose that quote with their small group.

## **Forced Voting**

Facilitators write a series of statements related to a given topic or issue on individual sheets of paper. Participants are instructed to read all of the statements in silence and then to "vote" their agreement or disagreement by placing a red or green dot on each sheet. After all participants have voted on

all statements, the facilitator tabulates the results and shares them with the participants, inviting reactions and comments from the group.

## **Carpet of Ideas**

The facilitator hands a large index card to each member of the group and then asks a question. After a time of silent reflection, the facilitator asks each group member to write their response in large print on the card, but not their name. The responses will be shared with the group, but no response will be attributed to anyone. The facilitator should place the completed cards on the floor, inviting the participants to read and reflect on everyone's responses.

## **Indexed Thoughts**

Similar to carpet of ideas, indexed thoughts invites participants to hold and share their written silent reflection with the rest of the group rather than anonymously submit it to the facilitator.

## **Mutual Invitation**

One participant invited the next to speak. If the person who has been invited to speak is not prepared to do so, they may "pass" the invitation to someone else with the knowledge that the group will return to them. The process enhances the participants' sense that they collectively own the dialogue and is effective when participants may not be responding well to a particular facilitator.

## **Graffiti Wall and Gallery Walk**

The facilitator hangs a large piece of paper on the wall of the dialogue space and writes a word, phrase, or question. Participants write or draw their responses on the paper all at the same time. When done, participants silently read and process what others have written/drawn.

# Troubleshooting

**Sharing authority with visitors and creating space for them to engage with each other and with the content of the exhibition might lead to new interpretive challenges.** Some challenges are listed below with suggested facilitator responses, group guidelines, and techniques to address them.

**One person dominating the discussion.** Remind the group that everyone is invited to participate. Say, “I hear your passion around this and I would like to make sure that others in the group can share their perspectives as well.”

**Participants unable to shift from debate to dialogue.** Remind the group that the purpose of the dialogue is not to debate or convince one another of our “rightness.” Say, “Everyone here has a kind of expertise or knowledge about (topic). While you may want to share your perspective with us, I invite you to first hear from other so that we might deepen our collective understanding.”

**Participant puts forward false information.** First ask yourself if it is vital to correct the information. Be aware and conscious of your own biases and need to “fix” beliefs that don’t match your own. Ask, “Has anyone else heard other information about this?” If no one offers a correction, you might raise one. If participants get hung up on a debate about facts with no answer, remind them that experts often disagree and redirect them to the dialogue.

**No one wants to talk.** You may be filling up too much space yourself, so monitor your own talking. Ask participants to talk about a particular point within a small group and then bring everyone together again. Try to bring other views into the discussion, especially if no one in the group holds them. You might say, “Do you know people who hold other views? What would they say about (topic)?”



**Conflict erupts between participants.** Remind participants that airing different ideas is why they've come together; however, for the dialogue to be productive, it must be focused on the issue. Invite others into the conversation if conflict is escalating between two people. "Would someone else like to offer an opinion?"

As facilitator, you are struggling with a topic or something said by a participant. Have two or three short, non-confrontational phrases that you can use to buy yourself time, e.g. "Tell me more," or "Does anyone else feel similarly?" If you know a topic presents problems for you, co-facilitate. Review your "trigger" issues with your co-facilitator beforehand and decide on a physical cue that will help you signify to your co-facilitator that you need to step back.

# Sample Questions

## **Developing good questions is vital to the success of facilitated dialogue.**

By asking the questions in an open way, facilitators can elicit participant response; a negative tone or pointed question can shut participants down. By understanding the development of questions, a facilitator can increase participant engagement and help participants learn this skill themselves.

## **Three types of questions**

**Factual questions.** Have only one correct answer. *When was Rudyard Kipling's The Jungle Book published?*

**Interpretive questions.** Often have more than one answer, which are ideally supported with evidence. Depending on their personal interpretations, people can have different, equally valid answers. *How did Rudyard Kipling's The Jungle Book share American's image of Indian Americans?*

**Dialogic questions.** Have no right or wrong answer because they ask for opinion, belief, or knowledge based only on personal experience. *What troubles you most about society's perception of (topic)? What do you find most reassuring?*

## **Phase One**

The questions should be non-threatening and allow participants to share information about themselves. They require only a participant's personal experience to answer:

- When people ask you where you are from, what do you tell them and why do you respond this way?
- Chose five words that you would use to describe yourself.
- When you consider (a word related to the exhibition) what comes immediately to mind?

## Phase Two

The group should share both similar and differing experiences. Facilitators should ask follow-up questions that encouraging participants to compare and contrast. Questions to ask after exhibition specific questions:

- What differences do you notice in how you've experienced this topic?
- How was your personal experience different from others in the group?
- How was your personal experience similar to others in the group?

## Phase Three

Facilitators should be focused on helping participants to explore assumptions about the topic, encouraging them to examine why people believe as they do. Sample questions to use after answers to exhibition specific questions:

- Tell me more about that.
- How did you come to feel this way?
- What are the assumptions you make when you think about this topic?

## Phase Four

A sense of community should be built among participants. Use questions to help participants examine what they have learned about themselves and each other share the impact that they dialogue has had on them.

- What, if anything, did you hear today that questioned your assumptions? What did you hear that affirmed your assumptions?
- Are there things you heard today that you want to understand better?
- What have you heard that inspires you to act more on this issue?

# Facilitated Dialogue Observation Form

This form is for facilitators to complete. Please send a completed of this form and any completed participant surveys to SITES, MRC 941, PO Box 37012, Washington, DC 20013-7012.

Introduction: "My name is \_\_\_\_\_. I work with the (organization name) and I will be observing today's program. (Exhibition Name) was created by the Smithsonian Institution Traveling Exhibition Service. This dialogue is part of a national initiative to use this exhibit as a starting place for people to discuss contemporary issues surrounding hte exhibition topic. To this end, we're evaluating programs like this one to see what is working and what is not. I'll be taking notes during the discussion. I'm happy to share my observations with you after the program is you are interested. Thank you for letting me join you today."

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Date	Organization	Dialogue Program
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Number in group	Observation Sheet #	Group (if applicable)
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As you observe the program, place a check mark in the middle column each time you observe a behavior. At the end of the program, add up the total for each behavior and enter it into the third column.

TYPE OF BEHAVIOR	# OF TIMES OBSERVED	TOTAL
Participants ask questions of facilitator(s)		
Participants ask question of other guests		
Beyond introductions, participants share stories		
Participants talk to each other		
Participants share opinions about the issue*		
Participants linger and talk with faciitator(s)		
Participants linger and talk to each other		

*\*After the dialogue has ended, please describe what types of emotions you observed and discuss with the facilitator how well they handled these emotions.*

**After the program, meet with the facilitator and answer these questions.**

1. Did you hear participant(s) indicate in any way (e.g. "I never knew that") that they learned something new about \_\_\_\_\_ (fill in the blank with the subject of the dialogue program) then or now? If so, what did they say they learned?

2. Did you hear or see any evidence that participants were making connections between issues of the past and the present? If so, what were they?

3. Suggestions you have for ways to improve the dialogue of this program?

4. Suggestions for ways the facilitator(s) and you might have for improving the way they facilitated the dialogue?

5. Were there any factors outside of the control of the facilitator(s) that impacted this program in any way? If so, what were they? What did the facilitator(s) do to ameliorate those factors?

# Facilitated Dialogue Participant Survey

This section will be filled out by the facilitator. Please distribute to visitors and return completed surveys to SITES, MRC 941, PO Box 37012, Washington, DC 20013-7012.

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Survey #	Date (mm/dd/yy)	Organization
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Your opinions are very important to us. Please note this survey is only about this program, not the exhibition or the host organization.

1. Please rate the following:

<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Undecided</b>	<b>Agree</b>	<b>Strongly Agree</b>
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a. The facilitator made me feel comfortable expressing my opinion.

1	2	3	4	5
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b. The facilitator made me feel comfortable asking questions.

1	2	3	4	5
---	---	---	---	---

c. I gained insights into different perspectives from fellow participants.

1	2	3	4	5
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2. If you rated any of the above items a "4" or below, please tell us what we could do to make it a "5" for you.

3. For me, the dialogue program was (please circle one of the numbers on the scale below):

1	2	3	4	5
<b>Not Valuable</b>		<b>Moderately Valuable</b>		<b>Extremely Valuable</b>

PLEASE CONTINUE THIS SURVEY ON THE NEXT PAGE

4. Please tell us why this dialogue program was or was not valuable to you:

5. Please rate the following statements (fill in the topic in the blank spaces)

	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Undecided</b>	<b>Agree</b>	<b>Strongly Agree</b>
<b>a.</b> The dialogue program gave me an increased understanding of the history of _____	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>b.</b> The dialogue program gave me an increased understanding of contemporary _____ issues	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>c.</b> The dialogue program helped me connect issues of the past to issues today	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>d.</b> The dialogue program gave me an increased awareness of opportunities to engage in contemporary _____ issues	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>e.</b> I would recommend this program to others	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>

6. If you rated any of the above items a "4" or below, please tell us what we could do to make it a "5" for you.

7. How did you hear about the dialogue program?

# Code of Conduct

\_\_\_\_\_ is dedicated to providing a harassment-free experience for everyone, regardless of gender, gender identity and expression, age, sexual orientation, disability, physical appearance, body size, race, ethnicity, religion (or lack thereof), or technology choices. We do not tolerate harassment of participants in any form. Sexual language and imagery is not appropriate for any venue or platform, including talks, discussions, Twitter, Facebook, and other online media. Participants violating these rules may be asked to leave or have their comments and submissions deleted at the discretion of the organizers.

*Thanks to The Ada Initiative for developing this open code of conduct and sharing it with a Creative Commons Attribution license.*



# FACILITATED DIALOGUE

**Use the code of conduct on the opposite page (page 20) to set boundaries for any event or online discussion your organization hosts. You can put the code of conduct on your website and link to it from the social media profiles of your organization. You can also hand out a printed version or have a sign at any hosted event at your organization.**

