

# Documenting events

## Purposes and types of documentation

There are many possible events in a collaborative planning process that may need to be recorded, and sometimes a full account of the decision-making process can be helpful or even legally required. That is where documentation becomes important.

Documentation serves three basic purposes:

- **Conserving information:** This purpose aims at the group itself. Even those engaged in the process will not retain all facts and events in their true order without a written reminder.
- **Creating transparency:** Outsiders may wish (or have a right) to learn how individual parties acted and decisions came about.
- **Establishing models:** Documentation makes it possible to learn from planning processes. Your proceedings may serve as instances for somebody else's projects, thus preventing the so-called 'reinvention of the wheel'.

In some situations, documenting can be done quite informally, in a way which suits the situation best and may retain personal viewpoints of the person recording. Such **informal documentation** is mostly confined to the above-mentioned purpose of conserving information for members of the group.

In other instances, and with regard to the benefit of other parties, a more **formal documentation** will be necessary, using templates and acting along legal provisions. As legal requirements for documentation may vary considerably, depending on national legislation and possible funding programmes exploited, they are not discussed here. Official documentation must usually be filed and stored appropriately and kept for a certain period of time after the project term has expired.

Formal project documentation should be objective to the highest extent achievable, unbiased by personal opinions and feelings. It should be easily comprehensible, even many years later, to anybody who has a basic understanding of the subject.

## From notepad to archive – maintaining a collective memory

Documentation can be seen as the memory of a planning process and, as such, is a collective memory which does not work the same way as that of an individual. Preparing project documentation is therefore a two-step process:

1. **Recording** information on the spot, using techniques fit to the venue and character of the event,
2. **Post-processing** this information for archiving.

The first step is common to all kinds of documentation, varying only in the techniques to apply. The second step is most important with formal documentation to ensure that others will be able to use it. This is important because individual memorising relies on mechanisms that do not exist equally in collective bodies. You can verify that easily by giving your jotted-down notes of an event to others who were not there: the very lines that make you relive every detail of the event will not tell them very much, if they can read your writing at all. Post-processing, therefore, is about shaping up your own notes and memories so as to fit the requirements of a collective pool of information.

## Preparing for the event

If you have been asked to record and prepare documentation of an event, here are some questions which may help you get ready and choose the appropriate techniques:

- Are there legal or formal **requirements** to your documentation?
  - Using project-specific templates is not a must because you can usually make a copy later, except for the case that your minutes must be signed by someone on the spot. Make inquiries as for signatures necessary and how to obtain them later, if needed.
  - If a list of the participants' names or any other data related to the occasion is required, make sure to get it while you are there – this is one thing you cannot usually make up later.
  - Will there be any voting? Legislation may require to record the distribution of votes or collect ballot papers and attach them to the meeting minutes.
- Do you need a **literal account** of statements? If so, a voice recorder is recommendable unless you are a very skilled stenotypist. Before the event starts, make an announcement that a sound recording will be taken, asking the participants for their agreement. Be prepared for refusal, in which case you will have to take notes manually.
- Will you take **pictures**? Having paper and pen at hand is compulsory. But for a public meeting or presentation, the possibility of taking photographs should always be considered. To avoid manual copying, you may want to capture writing on a whiteboard or on pieces of paper stuck to a wall. Sometimes pictures can be used to capture the overall atmosphere and to complement a report or an article written about the event.

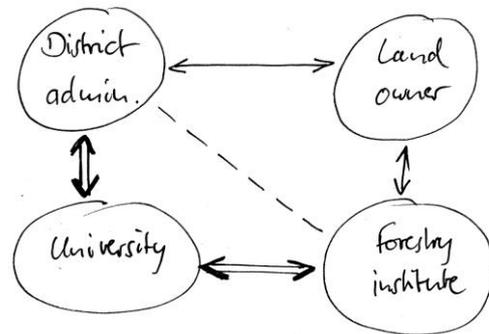
## Documentation techniques on the spot

**Writing** notes on a sheet of paper or typing on a computer is a common way of recording proceedings. Simultaneous listening and notetaking (while, possibly, taking part in the discussion yourself) requires some practice. In an informal meeting, you may always check back with speakers to ensure you got everything right, but it is generally not a good idea to pause activities in order to record them, because it will stall the flow of thoughts among participants. This especially applies to formal and

public meetings where interruptions from the minute-taker are not welcome. You may use any personal system of shortcuts, provided that you make a neat copy of your notes later.

**Drawing** mind maps or other diagrams can be used for visualising actions, options and correlations in a shorthand way. By drawing, it is possible to be creative and emphasize words and ideas using different colours and symbols. However, mind maps must be explained and are often not sufficient to carry precise factual information to outsiders.

On the other hand, mind maps and other diagrams can, however, be a nice supplement and reveal a great deal of information at a quick glance.



*Fig. 1: A doodle lacking explanation: What do the arrows stand for?*

**Voice recording** can be handy, especially if it is necessary to secure a literal account of statements. Make sure, however, to obtain every speaker's consent in advance. This applies especially to situations where it is not obvious to other people that their words will be recorded: in public meetings where the press is not visibly present and, mandatory, on the telephone. In some countries, you may commit a criminal offence by recording the spoken word without the speaker being aware of it, even if you do not publish any of it.

**Photographing** is an effective way of documenting proceedings, and not only to capture the atmosphere. For example, if large pieces of paper or whiteboards are filled with text or diagrams, they can be photographed to avoid the pains of copying. You can decide later what to take over to the official documentation. As with voice recording, there may be legal restrictions to taking and, especially, publishing photographs of people. If you intend to use any of your photographs for public purposes, it is a good idea to establish personal contact to the people pictured right on the spot. That way you will be able to ask them for their consent later on.

## Post-processing

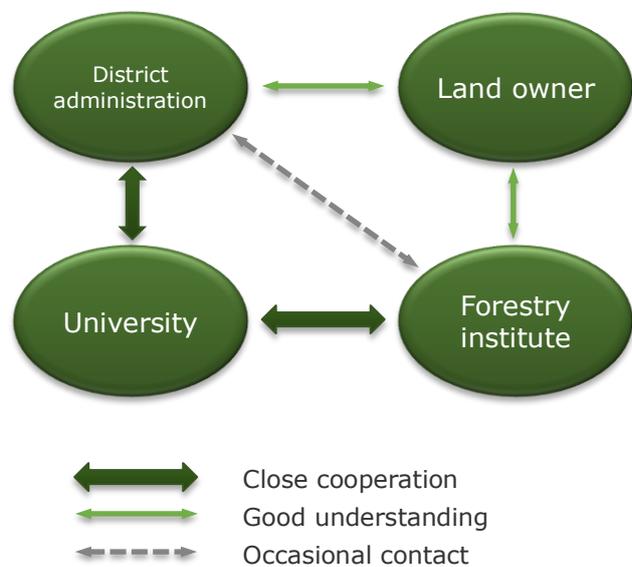
What you have recorded during events, by either of the above methods, will usually be sufficient to jog your own memory and bring back things later even if your recordings are incomplete – at least for a certain period of time. This is because looking at the words you wrote, the drawings you made and the pictures you took will activate what psychologists call your episodic memory: it reminds you of the situation and that usually recalls a lot more facts you did not write down or even consciously take in at the time. Equally, you will be able to sort out irrelevant details later by means of your episodic memory which weighs information according to how much it impressed you.

Be aware that any third parties do not have this advantage and that you yourself will lose it as time advances and new projects draw on your attention. Minutes, taken by whatever method, must usually be post-processed before being submitted to your project's documentation pool.

This has nothing to do with forgery. Pressed for time and eager to follow the course of events, you will take notes only of the facts which are new to you during the event and leave out many other things that are obvious to you but will become less so over time and may not be familiar to others at all. Post-processing is about including these facts, stored in your mind but not yet written down, in your documentation.

**Written notes** should be transferred to a text document, ending up with a PDF file, and straightened out in the process so as to eliminate personal bias and achieve linguistic clarity. While doing so, try to figure out what you took for granted and did not write down during the event – any information the reader, as opposed to yourself, may lack. Include this in the text for completeness. Take special care of itemised lists of headwords which often carry very little meaning if no context is given.

With **drawings** and **mind maps**, it is recommendable to provide a caption or key explaining what individual graphical elements mean. For instance, an arrow in a flow chart can symbolise a progress in time or from cause to effect as well as dependencies of various kinds. Try to make that as clear as possible. As for visual design, there are a number of special software packages available, but modern word processors also support creating drawings and charts on the fly.



*Fig.2: With the legend provided, it becomes clear that arrows symbolise relationships.*

**Recordings** should be transcribed where a written account of events and statements is required. Transcribing can be outsourced to a professional (who does not have to be a specialist on the subject) which is an advantage to the method in terms of working time. When passing your media files to that person, include a list of words they might not be familiar with. This applies especially to proper names of people and places whose spelling is not obvious.

With **photographs**, take the time to sort out what is irrelevant or redundant. People are very reluctant, especially in a shared working environment, to delete files once saved to common storage media. Excessive collections of data where a subset would do can make it very difficult to find the needed information. If you have taken a series of photographs of text (e.g. on a whiteboard), a document describing their contents, just like captions would, can be helpful.