

# Documentation design and preserving memories

Documentation can be utilized to the extent of easing the entire process of event preparation and further used as your organisational and community archive for community knowledge building. Not only does it serve your participants for preparation and the navigation during the event, but it can also be a great tool for your own organisation for reflection, lessons learned during the process, or as a capacity building or advocacy tool. Preparing and saving all documentation related material would be a strategic move as it could be a resource that you can further develop, build on, adjust and share in your community and wider network.

Here are some types of preparatory documentation and materials to consider during your planning and designing stage. You would probably want to have some or most of these ready at different stages, as well as to include your participants in the design of some of the documents.

- preparatory surveys and registration forms for your participants
- post-event surveys and evaluations for your participants
- post-event surveys and evaluations for your team
- consent forms for your participants
- consent, privacy and confidentiality protocol for your participants during the event
- manuals/instructions on chosen tools and platform for participants
- goodie bag (postcards, profiles, stickers, wallpapers, backgrounds and designs )
- manual for interpreters and captioners
- core values document
- principles of participation document
- event communications plan
- event roles and responsibilities
- event planning and design process timeline
- event schedule and agenda
- event documentation plan
- session(s) design outline
- read me document for your participants which can be a compilation of relevant documents and important content
- biographies of facilitators, key speakers, guests, panelists, etc.
- list of participants and their contacts
- material relevant for activities (speeches, presentations, books, songs, links)
- budget for your event
- contracts, agreements, reimbursement forms
- back up plan and preventive measures

### Check in

Remember to communicate with your speakers, facilitators and other relevant persons on delivering their prepared material as soon as you design your program so it can be adjusted and/or translated in advance and that it is accessible to all people. Also, don't forget that some of the material will contain personal data and content that could put some people at risk. Make sure to anonymise any compromising data (gender, region, name), secure your channels of communication, as well as your repository system.

## Documentation and participants

Some of the documents listed above will need to be designed and sent out to your participants beforehand. Think how to engage your participants in documentation design process so you can be on the same page and create a good plan. Here are some questions to have in mind when thinking about documentation and your participants:

- Are there pre-activities to design and send to them (for example, surveys, registration links, consent forms)?
- Consider preparing a goodie bag as to bridge the offline and digital realms. Here's an example of [APC's Member convening 2020 goodie bag](#).
- Will participants need support documentation, manuals, or material to prepare beforehand?
- You might want to consider a Read me document that can be collection of different documents (schedule, principles of participation, manuals, etc.)
- Is the material in accessible format? (consider readability, color contrast, image description, etc. and your choice of format)
- Is the material queer-friendly and supporting of diverse lived experiences? Mind the language and tone.
- Consider providing participants with a shared publishing space that can be easily managed by your preparatory team, and yet participants can contribute to.

Think if you plan to share and use the entire event or some aspects of it later on for promotion or resource development. Go back to your "Who will attend" section. Think of privacy, risks and safety of your participants when it comes to documenting the event and ask yourself some questions that can help you prepare in advance:

- Will people be able to maintain their anonymity?
- How will you ensure participant consent in relation to any information that might be shared?
- Will you as an organizer or the platform you have chosen be storing personal information, and does that comply with privacy and data protection regulations?
- Will the event be recorded?
- Where will different information be stored?
- How will you make sure the information stored is protected?

- Will the entire event or fragments of it be made public?
- Will participants quotes, photos or contacts in any way be publicly shared?

#### Check in

All of these listed questions involve consent forms, revisions of platform policies or adjustments and announcements you might want to start making already at the planning stage. You will find practical examples that address these issues during your online event in 'Consent, privacy and confidentiality' section of this guide.

## How will you document your event?

As we already shared in this guide, there are dozen documents that you would want to prepare in advance. However, the documentation of the event itself is an element that is adapted, adjusted and made unique by each organisation's framework: values, practices, approach, content and issues covered. Documentation serves the function of preserving the memories of powerful shared moments, conversations, insights and people - which can always be revisited. In this way, you can go back to the conversations, review highlights, and reflect on what worked and what can be improved. Video recordings, notes, quotes and visuals can also be incorporated in your advocacy activities, media campaigns, research, reports, etc.

To decide what to document go back to the purpose of your event as mentioned in the "What do I want to accomplish" and choose what can help you achieve that. Different forms will suit your different needs. For example, at APC we find visual documentation and graphic recording very effective to convey the content of meetings and discussions. Here is an example of APC Member Convening 2020 - Closer Than Ever graphic recording.

Documentation can take different forms: audio recordings, text notes (reports, highlights, summaries, transcriptions), video recordings, visual/graphic notes (illustrations), whiteboards (as a freeform space that could be informal but also intentionally used). However you decide to document, take into consideration consent, privacy and confidentiality protocols and forms for your participants. You can read more on these in the section "During the event".



### Types of documentation from APC's experience during our Member Convening and Take Back the Tech! 2020 campaign

- Audio recordings for internal use (with the consent of all participants in the plenaries).
- Text notes with the aim of writing up reports for internal use and to incorporate learning into our work and practices or used as base for posts during the convening or after it, as "shares with the wider community".

- Graphic/visual recordings to capture ideas spontaneously and synthesize them through illustrations.
- Recording is happening only in the plenary and only for documentation purposes. Recordings are stored securely on APC servers.



## Event documentation plan

Depending on the event duration, consider having a designated person for documentation, or a team of documenters during your event. The documenters are in charge of note-taking, graphic/visual recording and transcription, with outputs such as highlights of the day, summaries, illustrations, etc. Make sure you communicate with them in advance some of the key issues as you want them to be able to navigate spaces and content with ease. Here is a suggestion for a core template of some elements in the event documentation plan that you might find useful when designing your own:

- Roles, workload distribution, timeline and goals of documentation
- Contract points (terms of reference and deliverables), if applicable
- Program and schedule
- Sessions and objectives, bearing in mind:
  - languages and terminology used
  - optional attendance sessions
  - type of content shared and what should not be documented
- Communications and meeting spaces
  - Spaces that will be used for backend communication and future agreements
  - Workspaces and technology tools used
  - Spaces where the event will take place
  - Dedicated focal point for communication (questions, clarifications, scheduling changes)?
- Important links with relevant credentials (access/login details) provided
  - Links to working and meeting spaces
  - Links to folders for preparatory material
  - Links to folders for documentation outputs, including internal schedule of documentation
- Relevant policies, principles and practices of participation
- Next steps

## Using wikis to plan online events and publish supporting documentation

Wikis can be useful, as they allow users to easily edit and change content and engage in discussions around the content, without the need for specific software. You can think of them as

something between a webpage, and an online collaborative document such as pads, onlyoffice, or Google Docs.

The advantage of using wiki for your meeting documentation is that while your preparatory team can collaborate on editing the content you can establish different levels of permissions for different participants. These can range from just reading the content and downloading linked attachments, to editing certain pages of your wiki, for example participants' profiles, or the agenda. Different types of wikis are suitable for different purposes. For example, TikiWiki has a complex user permissions system allowing you to fine-tune access permissions of participants. At the same time it is more complex and less user friendly than MediaWiki where you can achieve a nicely organised layout without much formatting work.

Wikis are handy for meeting preparations because they give you an option to publish a page with all details about the event, and yet you have a possibility to update some documents or make last minutes changes with few clicks, if necessary. Replacing uploaded documents with updated versions is easy and you don't even need to touch the content of the main pages itself. So excellent for publishing preparatory documents or agendas where you foresee some possible last-minute changes.

Wikis are not that good for collaborative note taking, although it is a good practice to publish the final notes (or recording) from your event there along with other documents related to your meeting. However, for real-time collaborative note-taking you need a tool that is easy to access and allows real time editing by various users without them over-writing each other's contributions. Pads are ideal for that.



### **“From APC Member Convening 2020: Wikis as a map for our convening”**

During our APC Member Convening 2020 - Closer than Ever we used wikis and designed five books that served as a map for our convening:

1. Welcome to the convening [in Spanish, French and English]
  - Introduction
  - Member convening orientation guide
  - Read me
2. Tech guide for the convening [answers to tech questions so participants can focus on the sessions, ideas and the people at the convening]
  - Access and passwords
  - How to get tech support
  - Space(s) and platforms

- Manual for event organisers and facilitators
  - Manual for interpreters and captioners
3. Dish of the day [daily highlights of the sessions and an overview of the next day]
  4. Book of participants [member profiles - information on participants who were grouped in time zones so that they could reach out and get to know each other with information they had provided with consent]
  5. Tech choices [notes on some technological choices in relation this convening and APC's position and commitment to FLOSS technologies]



## Using pads for documenting online events

Pads work well even for low bandwidth situations, and have low latency (time delay) and CPU (energy/consumption) demands on computers of users who are contributing to them. They can be completely open so anyone with the link can see them and contribute to editing/note taking. They can also be password protected. Enabling authorship colors can help you track who is making which changes when number of people are working on the text (notes, in this case) simultaneously. Open pads can be very easily created at <https://pad.riseup.net> and <https://etherpad.org>.

Using pads for note-taking from your meeting can be useful even if you don't have several contributors but only one note-taker. Participants can watch the notes 'feed' building in real life. This can be useful for those participants for whom written text complements voice in important way, for example people with hearing impairment or participants for whom the language used at your meeting is not their first language. Similarly, live notes can be a life-saver for people who have issues with audio on their computer and who are still able to participate and follow conversation through the pad.

Note that live pads are integrated into some online conferencing systems, such as Jitsi or BigBlueButton.

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