MODULE SIX:
The art of documentation…
preserving institutional memory and promoting learning in municipalities
Outcome of this Session

• To appreciate the importance of; and the critical need for municipal documentation

• To be exposed to useful techniques for documenting processes
1. WHAT do we mean by documentation? WHAT are Learning Notes? WHAT are the good features of a Learning Note?

2. WHY is documentation important?

3. HOW does one document?

4. WHO should be responsible for documenting / preparing LNs?

5. To be exposed to useful techniques for documenting processes as an attempt to preserve institutional memory in municipalities
Plenary Questions

• In each of our own municipalities, how often do we take the time to document our municipal planning processes, challenges, stories, experiences?

• Why is this the case?
1a. WHAT should we be documenting?

• NOT about our Council minutes, resolutions, attendance registers, etc

• This is important too, but that is about DOCUMENTATION MANAGEMENT and ARCHIVALS

• NB: this week we are focusing on knowledge preservation and sharing of learnings…
• NO RULES as such… YOU must decide based on the needs of your municipality

• Three broad areas that documentation is invaluable in:
  • LEARNING EVENTS (Key learnings from workshops, exchanges, peer-events are captured in the form of Learning Note)
  • Good Practices & Innovations
  • Standard Operating Procedures (SOPs)
Knowledge Documentation in eThekwini:
Publications, Learning Notes, Manuals...
1b. WHAT exactly is a LEARNING NOTE?

- An easy to read, concise summary of the key learnings / lessons learned during the course of a workshop or learning exchange
- It is NOT:
  - A set of MINUTES
  - Resolutions (although it could contain them)
  - Full and detailed CONFERENCE REPORT
Sometimes learning can be captured not in a NOTE, but through pictures and cartoons exclusively…. This is referred to as GRAPHIC FACILITATION!
c. WHAT are the features of a good learning note?
Content

- Be sure to capture the MAIN POINTS
- Learning Notes are just that: they MUST reflect what the biggest lessons learned have been
- Light bulb / Aha moments and epiphanies are the guts of great learning notes
- Should give a sense of breadth of the discussion, but not go too deep
- If the event is video recorded, a learning note serves as an excellent teaser to urge the reader to watch the video or read the full and detailed report
Tone / Style

• … this depends on the nature of the event / approach of your municipality
• For MILE… we try and keep the tone of Learning Notes conversational… this is more engaging and personal
• For our publications we sometimes use the NARRATIVE as people love STORIES!!!
Creating a new Strategic Framework: The Alpine Heath Accord

Early 2001: Drafting the framework (visioning)

As the convoy of municipal buses from Durban snaked its way around the bends of the steep Drakensberg mountain roads, the passengers found themselves surrounded by a magnificent and timeless mountain range. These rugged cliffs, part of a crust of volcanic rock that formed the surface of the Gondwanaland super-continent at the time that Africa broke away from it roughly 120 million years ago, would now be witness to another process of significant transformation. This time, not one that would shift the natural landscape, but one that would forever change the face of local government in Durban.

The Imagine Durban Story

Touching Down, Setting Up

When Andrew Plunkett arrived in sunny Durban, after his long flight from Vancouver in late 2006, he had no idea of what to expect. As the international Project Officer appointed by the PLUS NETWORK after securing Canadian funding for the long term planning project in Durban, all he knew was that he had six months to help Durban organize itself for a two year long-term planning project. He obviously had a good sense of what the project was about, but was not as aware of how it would impact the culture, our ways of working and had not even finalized his personal accommodation.

Little did Andrew realize that in the following six months, he was to play an important role in laying the foundation for a unique and historic process that had never before been embarked on, certainly in Durban, and perhaps even on the continent: A process that was to unlock the imagination of ordinary people, from all walks of life. A process that not only helped crystallized the dreams
• Just TEXT is very boring!

• Captivating LNs / publications have a good MIX of:
  – Pictures / Photos
  – Quotable Quotes (with speech bubbles work really well!
  – Factual information presented through tables, charts, diagrams
  – Summary Boxes
• **Pic of miniskirt here** (short enough to hold attention and long enough to cover the subject)

• **Busy practitioners don’t have the luxury of time…so BREVITY is key!**

• **Cant stipulate exact lengths, as a guide:**
  - Day event: 5 pages
  - 2 Day event: 10 pages
  - 3 Day event: 15 pages …. MAX!!!
High Quality Product

• People are impressed with professional products
  – Well edited (spelling, grammar, etc.)
  – Well desk-top published
  – Legible and clear
  – Easy to read
Quick Turn-around time

… timing is everything!

No one wants to read about a learning event that happened three months ago !!!

Need to think about creative ways to ensure that the learning note is produced as soon as possible e.g. live capture and after-event work session !
2. WHY is it important to document?

- Learning Notes (LNs) serve as useful reminders of key lessons learned that can help re-inspire us to action.
- LNs and SOPS can help preserve institutional memory.
- LNs help build a culture of learning and sharing… promoting access to your knowledge.
- ULTIMATELY…. documentation is the foundation to positioning your municipality as a centre of learning!
3. HOW does one document / prepare LNs?

• Just Some Tips:

• PLAN before hand what you want from the LN:
  - be clear about the audience, exactly what the output will look like; its form / structure
  - Consider developing a skeleton even before the event itself!!!

• Identify key THEMES that emerge from the discussion – a thematic approach works best, rather than recording chronologically
3. HOW does one document / prepare LNs?

- If possible get the presenters slides / inputs earlier and make sense of it
- If working in a team, be VERY CLEAR about who is doing what – using a buddy system is great, but only if you communicate!
- Ensure that someone is taking pictures so that it can be integrated into the LN
4. WHO should be documenting?

... in a context where busy planners/practitioners have NO TIME to write who should document?
Some Qualities of a Documenter…

- Excellent writer (DO NOT COMPROMISE on your recruitment process!!!) with a creative streak!
- Developmental background critical
- Good conceptual and analytical skills
- Computer savvy (types, tweets, posts)
- Calm, cool and collected!
- Focussed and not easily distracted (dedicated just to this task)
- Perfectionist (will defend your brand)
- Committed to deliver on time
From the eThekwini experience…

• One option is to consider the use of a suitable INTERN

• However this will require:
  – Oversight
  – Mentorship
  – Clear terms of reference / expectations in terms of exactly what has to be delivered, when for THAT particular event
In closing...

- Just remember that Learning Notes will be your signature... as they will be shared internationally
- The insights provided are from our own experience
- They are ideas / suggestions only
- YOU will need to reflect on what works best, based on your municipal needs / context
- Be bold, experiment try new things
- Have fun!