

1 DOCUMENTATION

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Structure



- 1.1 Introduction
- 1.2 What is a Document?
 - 1.2.1 Understanding Documentation and its Importance
 - 1.2.2 Documentation Management and its Cost
- 1.3 Evaluation as a Part of Documentation
 - 1.3.1 Process Evaluation and Outcome Evaluation
 - 1.3.2 External Evaluation
- 1.4 Documentation System and Services
 - 1.4.1 Documenting an Event
 - 1.4.2 Documenting Celebrations Organization
- 1.5 Conclusion
- 1.6 Apply What You Have Learnt

Learning Objectives



After going through Unit 1, it is expected that you would be able to

- ❖ Describe the meaning, relevance and cost of documentation
- ❖ Carry out evaluation of documented material
- ❖ Plan and implement the exercise of documenting an event or a celebration.

1.1 Introduction

Most adult education setups (ALSs) carry out important activities but due to lack of their documentation, information and experience generated from such programs fail to reach others. Proper documentation of events is essential for providing the contemporary professionals and future generations the opportunities to know, learn, and benefit from the past knowledge and experience. Unit 1 is about basics and concepts pertaining to event documentation. Documentation for events involves two-way process of communication, and drawing upon all actors together in building records of

events. Hence, the term documentation in this Unit refers to the way an adult educator would carry out documentation. Please note that it does not here refer to the conventional context of building information systems for access and retrieval.

All adult educators are expected to carry out documentation work during their career but have no exposure to learn what is documentation and how does one undertake process documentation. Unit 1 and Unit 2 deal with the two questions and we hope that going through them will help PALDIN learners to consider

documentation a relevant and enjoyable activity. It is enjoyable mainly because all documentation involves a two way process of communication that draws all actors together in recording events that they

have been part of. Such a team work is always an enjoyable activity because it includes all educators and learners in a common activity and makes them share a common experience of documenting all that they have performed together.

1.2 What is a Document ?

A “document” is a collection of data, regardless of the medium on which it is recorded, that generally has permanence and can be read by humans or machines. Documents include both paper and electronic documents. A document is an amount of information on one or more related topics prepared for a specific purpose and presented as a unit. A document may be used in a printed form, online form or a combination of the two. Examples of documents include: manuals, reports, proposals, letters, faxes and emails.

Document, from Latin “documentum” and “doceo” literally refers to “an example meant to teach, both for giving instructions and for warning purposes” A document comes from “somewhere and leads towards somewhere else”. It is a support for decision making based upon information coming from different sources, which is meant to produce new information to be reused.

Documentation users may be viewed as information consumers, who may later on produce further documents and derivative information packages.

A documental unit is the end result of information assimilation and condensation processes and it is the result of a whole set of selection and transformation processes, which are meant to make information presentation effective.

A documental unit may easily be indexed and classified. By classification we mean

adopting the notation system of a specific classification model covering a whole range of documents.

1.2.1 Understanding Documentation and its Importance

In general terms, documentation is any communicable material (such as text, video, audio, CD, DVD etc., or combinations thereof) used to explain some attributes of an object, system or procedure. It is often used in today’s information era to mean engineering or software documentation, which is usually paper books or computer readable files (such as HTML pages) that describe the structure and components, or on the other hand, operation, of a system/product. In adult education we refer to documentation in the sense of keeping a record of activities undertaken by an adult education organization/ project. The documented material becomes a useful resource for its creators as well as for others interested in carrying out similar activities.

Good documentation is crucial to a data collection’s long-term vitality; without it, the resource will not be suitable for future use and its provenance will be lost. Proper documentation contributes substantially to a data collection’s scholarly value. At a minimum, documentation should provide information about a data collection’s contents, provenance and structure, and the terms and conditions that apply to

its use. It needs to be sufficiently detailed to allow the data creator to use the resource in the future, when the data creation process has started to fade from memory. It also needs to be comprehensive enough to enable others to explore the resource fully, and detailed enough to allow someone who has not been involved in the data creation process to understand the data collection and the process by which it was created.

Documentation amplifying processes, such as reformulation, revision, cataloguing and indexing, have proved to be most useful to support learning and information acquisition and absorption. Documentation (from Latin 'documentum': to be taught) is the output result of a whole set of packaging and repackaging operations performed ideally by individuals working collaboratively in groups, within the same organization structure. Daily events, current interactions, occasional conversations as well as planned meetings establish the conditions for information to flow through different media and in many and various ways and created the context for an accurate understanding of the organizational culture by en large.

Information may be coming in various flows and waves, to be filtered, categorized and organized as to be accessible and reusable for different purposes at different times. As soon as some information is found to be of relevance as to become stabilized and be turned into a document, then the need to store information in ways, which is to be made fully transparent, becomes a major issue. Information packaging based upon both topic continuity and context consistency is a most fundamental process, upon which

accurate and timely decision-making resides.

Availability and accessibility of packages of information in document formats needs to be supported by an enhanced labelling system, which may help speed up efficient retrieval. In other words, each document or piece of document will have to be labelled according to qualitative reasoning upon the nature of information.

Reshuffling scattered pieces of information coming in textual forms and formats, as to turn them into thoroughly organized documentation packages, according to a diversified set of needs and priorities and depending upon continuously changing scenarios, entails a specific competence and cannot be subject to arbitrary and occasional decision making.

Documentation organised and built up according to such view, does also constitute a tremendously rich repository for collective memories within an organization and does create the context for interpretation and understanding of present and past conditions.

The maintenance of comprehensive documentation detailing the data creation process and the steps taken involves a significant but profitable investment of time and resources. It is more effective if documentation is generated during, rather than after, a project. Such an approach will result in a better-quality data collection, as well as better-quality documentation, because the maintenance of proper documentation demands consistency and attention to detail. The process of documenting the process of documentation of a project can also have the benefit of helping to refine research

questions and it can be a vital aid to communication in larger projects.

Through documentation we create and provide evidence and we convey information. Documentation is meant to provide an interpretive infrastructure to a whole organization. Referring to the various definitions of the term “documentation” provided by Webster’s Dictionary, Third International Edition, let us especially focus on the following ones: “documentation is the provision

of footnotes, appendices or addenda referring to or containing documentary evidence in verification of facts or in support of theory in a piece of writing” and “the assembling, coding and disseminating of recorded knowledge, comprehensively treated as an integral procedure utilising semantics, psychological and mechanical aids, techniques of reproduction for giving documentary information maximum accessibility and usability”.

Activity 1.1

Read the above paragraphs carefully and write on a separate sheet of paper answers to the following simple questions.

1. What are documentation amplifying processes?
2. Who performs the packaging and repackaging operations of documentation?
3. What establish the conditions for information to flow through different media?
4. Why should information storing be transparent?
5. Why are topic continuity and context consistency major issues in information packaging?
6. Why is labeling system important in documentation?
7. Why does reshuffling of documented material require special competence?
8. How collective memories are important in documentation in an organization?
9. Should documentation be generated during or after a project implementation?
10. Keeping in mind the dictionary meaning of documentation, what is, in your opinion, the main concern of documentation in the field of adult education?

Good documentation is crucial to a data collection’s long-term vitality; without it, the resource will not be suitable for future use and its provenance will be lost. Proper documentation contributes substantially to a data collection’s scholarly value. At a minimum, documentation should provide information about a data collection’s contents, provenance and structure, and the terms and conditions that apply to its use. It needs to be sufficiently detailed to allow the data creator to use the resource in the future, when the data creation process has started

to fade from memory. It also needs to be comprehensive enough to enable others to explore the resource fully, and detailed enough to allow someone who has not been involved in the data creation process to understand the data collection and the process by which it was created. For the range of documentation related activities, see Box 1.1.

Reflection

Are there more documentations related activities than mentioned in Box 1.1? If yes, then include those in your range of documentation.

Box 1.1 Range of Document-related Activities

The range of documentation-related activities is

- ❖ Document design and development on paper and/or online
- ❖ Project management for documentation projects
- ❖ Proofreading, editing and related document quality assurance activities
- ❖ Indexing
- ❖ Considerations on software tools for document development and publication.

1.2.2 Documentation Management and its Cost

Documentation is defined as the process or specialty of accumulating and classifying documents and making them available to others. Management is the application of skill and care in the manipulation, use, treatment or control of things or persons, or in the conduct of an enterprise, operation and so on.

Beside and beyond information retrieval and knowledge dissemination, documentation management includes knowledge discovery, capturing and

creation, as well as knowledge classification and representation.

Documentation management is bound to accuracy, motivation and responsibility shown by individuals involved in the process of the document creation and further development throughout a whole set of transitional states. Lack of those elements radically affects the way information flows are perceived, monitored and channelled within an organizational structure. See Box 1.2 on lifecycle of documentation.

Box 1.2 Documentation Lifecycle

A sequence of tasks that comprise the process of developing and maintaining documentation is called Documentation lifecycle. The term 'lifecycle' is used to indicate that, as for living things, any human activity repeats after a period of time.

Documentation Cost

Documentation costs money so it must be included in your event budget. How much you actually spend depends on the methods that you choose. If you want a

professional to document your event it is a good idea to get a number of quotes and be clear about what it is you want documented. Remember to look for ways of making it cheaper. (See box 1.3)

Box 1.3 Tips for Ways of Making Documentation Cost Effective

Here are a few tips for you to bring the cost of documentation down.

- ❖ A local camera shop or photography student may be interested in photographing the event. The camera shop could display some of the photos in the store and sell copies to the community.
- ❖ Local colleges or schools who have access to audiovisual equipment may wish to video the event as part of a project or they may be willing to supply equipment.
- ❖ If you do have to pay for documentation, look locally. A local professional will probably do it a lot cheaper if there is a chance that they may get some free advertising for their business.

Activity 1.2

Describe the process of documentation that has existed in your workplace and discuss how you can improve it. Explain as to what will be the benefit of the improvement suggested by you?

1.3 Evaluation as a Part of Documentation

Evaluation is an important aspect of any event in your organization or project because it allows you to reflect on what has taken place and think about future planning. It is important to provide all those who participated with an opportunity to comment on the event once it is over. This will be a chance to review the event, its highlights and its shortcomings and should be an aid to future planning.

Evaluation can provide a chance to make a critical assessment of the event, to state lessons learnt, to identify the outcomes, to review the aims and objectives, to identify problems and to debrief the workers, participants and the community.

Ideally as many people as are involved in the event should be involved in the evaluation. This will guarantee a more realistic account of the event. It should involve monitoring all the processes of the event from the beginning to the end. The task of monitoring particular aspects of the event can be delegated to committee members. For example, the person, responsible for publicity, may collect all press clippings. Coordinating the evaluation may fall into the hands of the event coordinator or to someone from outside.

There are a number of ways in which your event can be evaluated. These will be influenced by your objectives and actions. If, for example, the main aim

of the event is to attract as many people as possible then you would evaluate the event in terms of numbers and audience sizes. Hopefully your evaluation will extend much further than only quantitative judgments and consider the range of experiences that the community gained from the event. For the most comprehensive evaluation use a variety of both quantitative and qualitative judgments.

Evaluation can be approached in a number of ways but there are two main approaches to evaluating a project.

1.3.1 Process Evaluation and Outcome Evaluation

This is a continual evaluation strategy that occurs during the life of the project. This type of evaluation needs to be built in to the regular activities during the lead-up to the event.

Outcome evaluation is an evaluation strategy that occurs upon conclusion of a project. There are advantages in applying either or both of these strategies. The method you choose will affect the type of information you will have at the end. Outcome evaluation is perhaps the most common method and usually takes the form of a general meeting and/or report.

1.3.2 External Evaluation

Another way of evaluating is to get someone not involved in your event to do it. However if you adopt this method

it is crucial that the person is very familiar with the aims and objectives of your event. Provide them with a clear brief so that they can analyse your event in an appropriate way. They should

commence their evaluation before the event starts and attend the event day(s). A consultancy fee may be paid to this person.

Activity 1.3

Describe in terms of method (s) of evaluation if an event in your organization was ever evaluated? If not, then describe if you have ever been an evaluator of any adult education program. In case, you have not encountered either of the above two situations, then construct an imaginary situation in which you are planning evaluation of your current work and state what method of evaluation you will select and give reasons for selecting the same.

1.4 Documentation System and Services

Today, the world is so much flooded with documented knowledge that it requires some system to be followed for locating the exact information at a time when it is actually required. This work involves organization of information in such a way as to make it available for a specific purpose in a readily usable form and in the shortest possible time. The nature of such work varies in different types of documentation centres and is determined by the types and range of the clientele it is designed to serve. Thus the nature of documentation centres serving a research institute, or an industrial enterprise or a commercial organization is entirely different both in the type of documentary collection as well as the range of services offered. In an adult education set-up, it is expected that adult educators carry out documentation of every important event starting from planning to initial survey of target learners to sanction of a project to implementation, its evaluation, success and loopholes/ shortcomings to recommendation by external evaluating agencies, meetings, day-to-day activities, financial expenditure, digital documentation of

successful activities, vocational skill development programs, booklets/ magazines/ newsletters/ publications developed internally and procured externally, manpower and their training and functions, etc. Being a multi-faceted actor in the profession, an adult educator has to perform the tasks requiring knowledge of documentation. Let us now look at two types of documentation, namely, Documenting an Event and Documenting Celebrations. Please note that in Unit 2, you will read about two more types of documentation, namely, Documenting a Digital Event and Software Documentation.

1.4.1 Documenting an Event

Documenting an event is useful for

- ❖ Recording experiences that capture the atmosphere and reflect the experiences of the event.
- ❖ Reusing when organizing your next event.
- ❖ Presenting to funding bodies of sponsors who have assisted your event.

- ❖ Presenting to possible future funding bodies or sponsors, or interested parties evaluation and consideration of the good and bad points of your event.

Most of the recording for documentation will be done on the day of the event. However, it may be useful to document some of the pre-event activities. See Box 1.4 on the list of documents to be recorded.

Box 1.4 Recording of Useful Documents

Using the following documents you can record what happens at the event.

Press clippings: Collect all press clippings from newspapers that have articles about your event. There are services available that will do this for a charge.

Photographs and slides: Photographs are commonly used to document events because they are fairly inexpensive, easy to organise and provide a good result. Slides are useful for presentation to large groups of people.

Video taping/ digital recording: Video taping or digital recording is a great way to document your event. A little more expensive but the extra animation and the inclusion of sound provide much more realistic recording. It is a good idea to edit your video to a short and concise five minutes if you want to use it for future presentations. A longer tape is more interesting and useful to event participants and organisers.

Radio and TV recording: Record radio announcements, interviews and advertisements. If your event is lucky enough to receive television coverage try to ensure it is recorded. Many events have a main stage or area where there is entertainment, whether it is music, comedy, dance or singing. The day's activities can be tape recorded, then edited and tidied up at a later date.

Sound recordings: Sometimes the proceedings of the event are recorded in a cassette or CD. Speeches made and discussions held are recorded so that nothing of importance is missed.

Surveys: Make a collection of comments from people who attend the event as well as those involved with the event (such as participants and volunteers). These comments can be gathered through written evaluations, letters of support or through tape recordings on the day. A written evaluation form, if carefully constructed, is also an opportunity to gather statistics about satisfaction levels at the event which can then be used for sponsor reports, funding applications and so on.

You need to take the following steps during the process of documenting an event.

i) General Meeting

Hold a general meeting about two weeks (no longer if possible) after the day of the event. Invite all those involved in the planning, implementation and participation of the event, including stakeholders, performers, key organizers, sponsors, staff and key community groups. The purpose of the

meeting will be to gather a collection of views on the event as a whole. The form this meeting takes is for the organisers to decide. An informal tone is probably best so that people feel confident and relaxed about being involved in the evaluation process. At this meeting the committee members responsible for a particular area can take notes for their evaluation report.

Discussion of the event can be started by getting everyone to comment on what each participant thought went well or

could have been done better. Problems that were faced should be discussed and solutions suggested and implemented for the future. All opinions and thoughts should be recorded so that they can be referred to when writing up the evaluation report. Avoid backstabbing and personal gripes during this process.

ii) Putting Together an Analysis Report

After gathering people's perspectives on the event, it is a good idea to collect the information and present it in the form of a report. The report needs to contain the following material.

- ❖ aims and objectives
- ❖ successful and unsuccessful aspects of the event

- ❖ people's responses
- ❖ collection of press clippings
- ❖ photographs
- ❖ financial statements
- ❖ event program and other promotional/publicity material
- ❖ future directions/commendations for the future

1.4.2 Documenting Celebrations

Documentation is done to capture important historical moments, to increase awareness and interest in the relationship between past and present and to provide a model for future celebrations. See Box 1.5 on what and who to document.

Box 1.5 What and Who to Document?

All aspects of the celebration should be documented such as:

- ❖ Meetings - organizational and planning
- ❖ Programs and Events
- ❖ Newsletters and Publications
- ❖ Planners
- ❖ Committee Members
- ❖ Sponsors
- ❖ Participants
- ❖ Audiences

Materials documenting celebrations do generally include the following documents.

- ❖ Personal Journals
- ❖ Published and Printed Materials
- ❖ Photographs, Film and Videos
- ❖ Correspondence
- ❖ Oral Histories

Besides paying attention to materials for documentation, you need to put emphasis on where to place documentation and remembering celebrations through

documentation. In addition you may also like to know about "event historian" and time capsule - important aspects of documenting celebrations. Let us discuss in brief each of the four points.

i) Where to Place the Documentation?

The materials documenting an important celebration should be placed in a permanent location or "repository" where the records are kept secure, organized and accessible. The permanent location could be any of the following places.

- ❖ The archives of the sponsoring organization
- ❖ A local historical society
- ❖ With the local government historian
- ❖ A public library local history collection
- ❖ A local government records repository
- ❖ A college or university archive or special collection

ii) Remembering and Documenting Celebrations

Celebrations should be remembered and documented. The depth of documentation will be different for annual events and for special events such as centennials.

- ❖ **Annual Celebrations:** Annual celebrations can be documented with administrative records for the event. There will probably be no need for additional efforts.
- ❖ **Special Celebrations:** Special celebrations that involve a wide variety of community members will need to have specific documentation efforts built in from the very beginning.

iii) “Event Historian”

Someone should be designated “event

historian” to

- ❖ Save all relevant materials.
 - ❖ Label and organize them in such a way that they can be used.
 - ❖ See that they are placed in an organized collection or repository
- Well-documented celebrations will be remembered much more vividly and will remind sponsors and participants of the successful event.

iv) Time Capsules

The creation of a time capsule is often considered during the planning of a celebration. Time capsules are fun, and their appeal is understandable. But the actuality is often disappointing. Most time capsules are buried or placed in cornerstones. When removed after 50 or 100 years, most materials placed in them have deteriorated to the point to where they can’t be handled or read. An alternative is to place the time capsule in an acid-free box in a permanent location or repository that has temperature and humidity controls. The time capsule box could be sealed for the desired time and opened at the appointed hour. Because it would be stored in a protected environment the material would be in relatively good condition when retrieved.

Activity 1.4

As an adult educator you may have across many events/ celebrations in the field of adult education. Have you also observed/ participated in any of them? If yes, describe at least one of them in terms of the details given in subsection 1.4.1 and sub-section 1.4.2.

1.5 Conclusion

Now that you have reached the end of Unit 1 on ‘Documentation’, you have gained the knowledge of the basics of the term documentation to the knowledge of what to document and the different things/ events to document and its importance in an adult education

set-up. Documentation, as we have learnt in this unit, is not only the collection of important data but also a systematic arrangement of those data to substantiate decision-making and support diversified needs and priorities in the context of an ever-changing scenario.

You have also read about documentation management and its lifecycle. Documentation need not be a costly affair and you can discover ways of making it cost-effective. Evaluation as a part of document provides an opportunity for assessment and identifying problems and tightening loose ends. The section on documentation systems and services

gives a broader perspective on why, how and what to document and the efficient ways to carry out documentation in an adult education set-up. As an adult educator, you have a role to play in shaping the future of literate persons in a society. An effective and efficient documentation system helps us in achieving this goal.

1.6 Apply What You Have Learnt

As an adult educator you need to carry out documentation work and Box 1.5 has already mentioned what and who to document.

It is not enough to understand what and who to document. You need some tips about when and how to document and for this purpose you may go through Box 1.6.

Box 1.6 When and How to Document?

Begin with the first organizational or planning meeting. Continue until the celebration or event is over.

One person should be designated to keep the materials together. As soon as possible after taking the photographs or the videos, identify the date, event, people, and location. Meeting minutes, clippings, programs and other papers should have dates.

Try to sort and organize materials for easy use while the celebration is in progress and so the materials are in order for placement in a permanent collection.

Avoid storing the material in basements, attics or garages. Dampness and temperature extremes will damage paper and photographs

When in doubt, **DON'T** throw it out!

Now you are ready to carry out a short application-oriented exercise, dealing with learning points of Unit 1. First, describe the status of documentation in the adult learning set up (ALS), that is, your work place. Second, write in brief about your plans to improve the current status of documentation of your ALS.

Tips for the adult educator for better organisation of documentation

- ❖ Each day, an hour prior to the time of leaving your desk for the day, organise your important materials in
- ❖ a sequential way so as to keep a record of the important happenings of the day and how they are going to affect the running of the AE program. Write down the important points.
- ❖ Date-wise and event-wise arrange and document materials
- ❖ Never mix up materials pertaining to different events, meetings, celebrations, teaching-learning process or vocational training inputs in one single file
- ❖ Always keep a 'to do' list handy and

do it priority-wise to eliminate any confusion and last-minute rush

- ❖ As far as possible finish each day's documentation process as soon as the event/meetings/visits/skill training programs, etc. are over to ensure accurate and attentive data to be documented

Now that you have studied the whole unit, plan the documentation of your adult education set-up based on the following activities.

- ❖ Collection of data to document
- ❖ Assessing those data as per priority, time and reference
- ❖ Calculation of its cost and how to make it cost-effective
- ❖ Self-evaluation of data
- ❖ Documentation of different programs/events/meetings/celebrations, etc.
- ❖ Placement of documentation
- ❖ Future plans and activities

