Tool 40: Document and Summarize

Aim of the tool
To capture ideas, insights and decisions in MSP discussions.

When to use it?
The co-creation stage, but also in other stages.

What is documenting and summarizing all about?

Documenting and summarizing are important habits often taken for granted, or not used to their full potential. Some examples of what can go wrong:

-The chairperson forgot to organize a documenter and delegates this task last-minute to an unprepared intern…

-The note-taker formulates the main insights on his/her own afterwards, risking a biased or incorrect interpretation of the real proceedings…

-The note-taker captures the main plenary proceedings, but has no track of the outputs of parallel small-group work…

-Under time pressure, a meeting ends without a summary of main areas of agreement/disagreement, or decisions made…

-A chairperson summarizes the outcomes of an MSP meeting without double-checking the exact wording with stakeholders present…

Neglecting to document and summarize well has many consequences. Without adequate summarizing some stakeholders may not understand how the process is progressing, as summarizing has an important function to 'make sure everybody is on the same page'. Another consequence can be that conflicts arise, due to sensitive topics being included or excluded from the meeting reports or public statements. Documenting and summarizing are therefore key elements of managing the risks inherent in MSPs.

Ways to ensure that documentation actually supports MSP decision making

Checking by the consensus by summarizing together:

It is good practice to double-check that every stakeholder is clear about agreements made during a meeting. This can be done by summarizing what has been discussed, and asking if this summary reflects everybody's recollection. This summary of outcomes can include a) decisions made; b) areas of agreement; c) areas of disagreement.

This process is important for two main reasons: (1) Making sure that all participants agree and understand the outcomes and key issues of a meeting or discussion. As participants are often less alert at the end of a meeting, it is even more important to clarify the issues discussed and make matters explicit; (2) Creating consensus on a common message to be distributed by participants to their networks.

Participants will recall and present key issues of a meeting from different perspectives. This cannot always be prevented. Still you to make this explicit and stimulate or 'seduce' participants to come to an agreed common message.

Be prepared to document in real-time

Don't delay documenting until the meeting is finished. Rather, draft texts about key points that can be shared and fine-tuned with participants. Use coffee breaks to edit essential wordings, and allow participants to suggest changes whilst the discussion is still fresh in everyone's minds.

During a discussion:

-Ensure that everybody clearly understands what is being discussed. Write down on a flipchart the question or discussion topic to keep the group focused.

-During the discussion, use flipcharts or an empty Powerpoint slide to write down main issues.

-At the end of a discussion present these key issues back to the group. Ask if everyone agrees with the wording and if needed, ask someone to clarify.

-Let participants vote or otherwise decide what they consider to be the most important issues at the end of the discussion.

Tools for building consensus:

- A simple method for building consensus is to provide each participant with a green and red card and instruct them to hold up the green card if they agree on the formulation of a key issue/outcome/conclusion and a red card if they disagree;
- Another tool which can be used is 'Gradients of agreements', a tool developed by Sam Kaner (2014). For a description of the tool click here;
- Another useful tool at this stage is 'Set Decision Rules', see Tool 52.

-Be careful not to dwell endlessly on crafting the right wording of a summary. Rather, do a rough summary in the plenary and invite a small group of 2-3 participants to finalize the language after the meeting. Make sure that this small group is representative of the different stakeholder views.

Involving participants after the end of a meeting:

-Try to share the key messages of the meeting with the participants within one working day. Announce during the meeting that participants will get such an email and ask them to respond with feedback within 24 hours. This is an effective way to quickly get back to participants after a meeting and keep them engaged. It also increases the chances of getting much higher-quality feedback. Inform participants that a detailed report, inclusive of their feedback, will be shared within several weeks.

-Approach participants who are likely to blog about the event, meeting or discussion. Blog entries are usually written right after a meeting or event. They can thus serve as a quick medium to report about a meeting or event and keep participants and their networks engaged. You can either choose to request bloggers to post on your MSP website (if this exists), or leave them free to post on their personal or organizational websites. In the case of the former, ask permission to edit the blog to ensure it accurately reflects the event.

Learn more

Gradients of Agreement:

S. Kaner, (2014) 'Facilitator's Guide to Participatory Decision-Making': 333-373:
http://msue.anr.msu.edu/news/gradients_of_agreement_can_help_move_groups_forward

http://rubenvanderlaan.com/2012/02/are-your-meetings-clear-about-decisions/