
Process Documentation and Journal Writing

*Guidelines for Making the
Most out of Your Field
Experiences*

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Contents

Introduction	1
Process Documentation	1
Written Process Documentation	1
Graphical Process Documentation.....	1
Other Forms of Process Documentation	1
Journal Writing.....	1
Combining Process Documentation and Journal Writing.....	1
Weekly Activity Reports.....	1
Keeping a Separate Journal.....	1
Creating Images	1
Profiles.....	1
Personal Experiences.....	1
Illustrating Your Experiences	1
Maintaining Momentum.....	1
Conclusion	1

Process Documentation and Journal Writing

Guidelines for Making the Most out of Your Field Experience

Introduction

Process documentation and journal writing should become a natural extension of the work that you do while you are in the field. Both of these types of writing are meant to describe what happened in the field, and both of them will include different kinds of information to help you later on when writing your reports. But while these writing tasks are related, they are different in their purposes. Broadly speaking, process documentation is purely objective, while journal writing is more flexible and allows for more subjective commentary. The following document was written to help you get started with process documentation and journal writing. I urge you to take the included information as “guidelines” and not as a prescriptive set of rules or requirements.

Process Documentation

What is process documentation? To better understand, let’s look at the words separately. **Process** essentially is a course of action to achieve a given result, and **documentation** provides information about the operation, use, or condition of something. As can be deduced, then, *process documentation* is an attempt to narrate—usually in writing—the steps you have taken in your work. Process documentation serves several purposes. It helps you gain clarity of the events which actually took place so that you can later analyze the results effectively. Reviewing process documentation might also highlight the steps which you might have missed. Process documentation can serve as a learning tool for others who will be working on the same types of activities as you are, as well as serve as a source of ideas or inspiration for developing new projects.

Written Process Documentation

As mentioned, most of your process documentation will be written. This, unfortunately, can be a little challenging. It is challenging because most of the writing will be done *after the event we are documenting*, not during it; we don’t want to be writing while we are going through each group formation step, right? Not only would it distract us, but most likely, it would distract the people you are talking to.

Content for Process Documentation

For your process documentation, you may want to ask yourself the following questions:

- What were the specific steps involved in each activity—for example, screening, building trust, understanding development issues, forming groups, establishing bye-laws, and conducting quality checks?
- When conducting workshops or campaigns, what were the steps involved in proactively planning your content? What were the stages involved in event management?
- What processes are involved in getting information from different stakeholders or participants—including your field guide and people staff?

Keeping that in mind, what can you do to help ensure that your process documentation—done now from memory—is accurate and useful? One solution would be to first establish a checklist of the steps you *think* you should do (based on any prior experience or on the classroom materials). Keep this checklist handy—maybe in your pocket or bag—and refer to it *as soon as possible after the event* and think carefully about whether you actually achieved each step. At this point, you can also add any new steps you went through and make brief reminder notes if any steps were particularly challenging. The purpose of this checklist is to help you remember what *actually* happened so that when you are ready to formally create your process document, you already have a record of what happened.

Note here that creating this checklist is, in itself, a part of the process!

Graphical Process Documentation

Next to written process documentation, *graphical process documentation* is likely to be the most practical and common type of process documentation for you to produce. Graphical process documentation can take various forms including a simple flow-chart, a hierarchical branching diagram, or even a timeline.

It is important to note that some graphical process documentation may also need a certain amount of explanation; you

should not expect a diagram alone to describe the steps taken. For example, the graphical process documentation in Figure 1 is fairly self explanatory, but it can be improved by a more accurate caption and by including a sentence or two indicating perhaps that “*Figure 1 illustrates the cyclical inter-relationships between process documentation, journal writing, and weekly reports.*” By including this information, you can ensure that your reader does not misinterpreting your graphic.

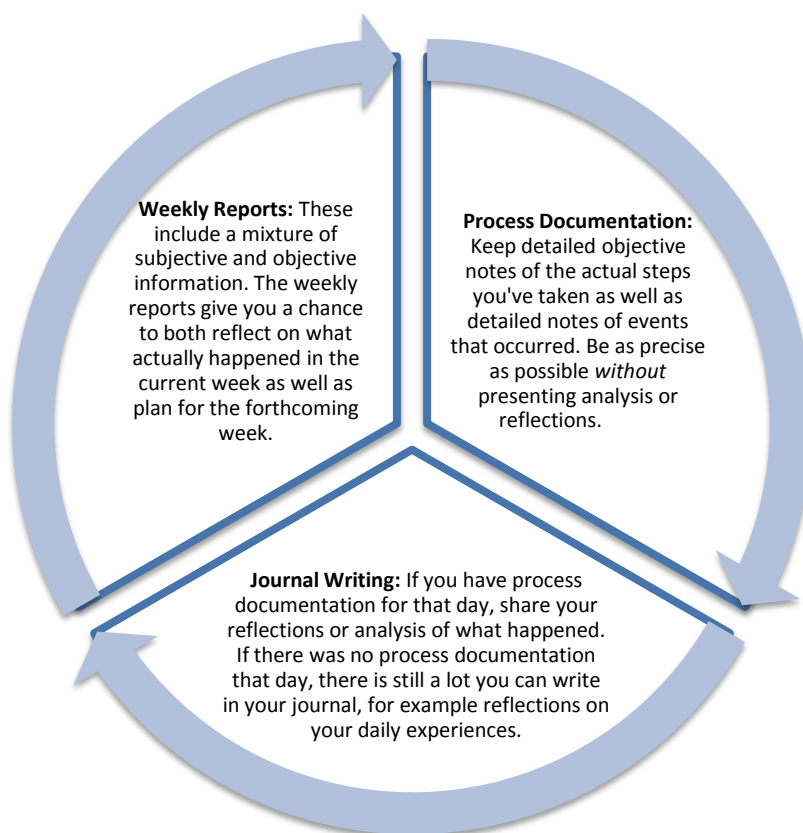


Figure 1: An Example of Graphical Process Documentation

Other Forms of Process Documentation

Process documentation can take other forms including photographic documentation and audio or video recording. Note that while these forms of process documentation have several compelling advantages, their disadvantages are also quite significant.

For the advantages, if you are able to make an electronic record of the sequence of events, you do not need to concentrate as closely on trying to remember exactly what you did and what order you did things in. Video or audio recording can help you identify very particular things—such as your selection of words or your body language—which can have an impact on your success; this is something that would not be captured in normal written process documentation.

What about the disadvantages? There are several.

- First, think about how you act or speak if you know you are being recorded. Most of us would agree that our behavior or our choice of words change. Chances are that if you videotape the people you are working with—for example a group of women that you are trying to mobilize into a group—their reactions would be different from what they would be without a video-camera present. Some people don't even like to have their photo taken, so much so that even introducing a camera into the setting makes them uncomfortable. Some may ask, *Well, can't we make an audio recording with a concealed recorder?* You can, but it is likely that you would need to verify the legality of doing so. Most laws state that if a conversation is to be recorded—even a phone conversation—both parties must be aware that a recording is in progress.
- Second, think back to some of the uses of process documentation: to document the steps that actually took place and to serve as a learning tool. Think realistically about effective motivators. They manage to motivate people in an almost seamless way. In fact, if you are asked to identify the steps they have taken to motivate people it might be hard to actually identify what each *step* was. The same can be said about reviewing a videotape: it might be possible to observe things like the ambiance, tone of voice, or overall mood, but trying to label everything that happens as a “step” may be impossible. In other words, the ability for a video or audio recording to serve as a “template” for others is actually much lower than a carefully prepared concise accurate written document.
- Third, many people who use electronic recording methods, realistically speaking, simply complete the documentation, archive the recordings, and pack them away on a bookshelf somewhere. The energy it may take to sit through a three-hour or longer video of an event and try to identify what exactly is happening at each stage is usually much greater than the energy spent reading even a lengthy 20-page process document. Also, one can much more easily take a printed document with them to read on a long bus ride than they can take a video to watch, right?

Many of the ideas towards electronic process documentation are changing. As technology becomes easier to use, electronic process documentation is becoming more commonplace. That doesn't mean it should replace written documents. After all, sure, a picture tells a thousand words... but how can you make sure that people know which thousand words you think are most important or relevant?

Content for Journal Writing

At the journal writing stage, it is important to reflect upon the work you have done so far. Some examples of topics and questions to write about in your daily journal include:

- Your reflections—even including emotions and analysis—on the processes involved at each stage. Are these the most effective methods? Are these methods applicable to different situations?
- The difficulties you faced along the way. Was there anything you wanted to do that you were not able to do? Do you have any other ideas of strategies which may be more successful?
- Based on your observations, what can you share about the community's perspective on poverty and development? How does that compare with your perspectives on poverty and development? How might these perspectives affect the outcome of a development intervention?
- What features of the community help facilitate your work?
- What kinds of coping strategies have you developed in the process of your field work? How did you develop these strategies?
- How did you build the trust among different community members?
- After reflecting on earlier journal entries, how has your perception of your work changed? Do you see the problems differently than before? How has your understanding of the challenges changed?

Journal Writing

Journal writing—or diary writing, or daily log, or whatever you decide to call it—is actually quite a difficult topic to address. It is difficult especially because it really is a personal process. However, well written journals can be extremely interesting, revealing, and—perhaps most importantly—informative to both yourself and others.

One very basic reason to write is that writing helps you to remember something better. This is why we take notes in class or when reading a book. This is why we write notes to ourselves. But, because we often don't know exactly what to write, we simply decide not to write, and our stories are left to become fading memories.

Journal writing for your field experiences is a little different from regular diary or journal writing. Both stem from your personal experiences, but writings on your field experience ultimately try to highlight things like your major learnings from the day, the types of activities you engaged in, the questions which have arisen, select narratives which can be used in your reports, and analytical insights into steps you have recorded during your process documentation.

Following are some tips and suggestions which may make your journal writing experience more rewarding.

Combining Process Documentation and Journal Writing

One option for combining process documentation with journal writing would be to actually divide each page in your notebook into two sections. The easiest way is to simply draw either a horizontal or vertical line halfway down your page or to use pages on the left for one type of writing and pages on the right for the other kind of writing. (See Figure 2 on the following page for an example of an entry that you might find in a side-by-side process document and journal entry).

Thus, your journal and process documentation can coexist quite nicely. It should be reiterated, however, that one form is objective and one is subjective, and this is precisely why your pages should be kept separate. The advantage of keeping them together is that it is easy to compare what actually happened with your reflections on the process.

Weekly Activity Reports

Another strategy you may want to include in your journal is a weekly “continuous” activity report or action plan. By “continuous,” I mean a plan that considers both what actually happened that week and what you hope to do the following week. The process can be similar to the following. For the first week, you create an action plan for the forthcoming week. At the end of the first week, you reflect on the activities you actually accomplished during the first week, make a note of them, and using that information, develop a plan for the second week. The process is repeated at the end of each week.

Note that your weekly goals or objectives will probably be different from your daily goals and objectives. For example, while your daily goal might include a specific goal like “meet with 10 households and discuss xyz,” you might have broader weekly goals like “understand why households in this respond in zyx manner to xyz.” Notice that even if you meet your objectives to discuss your topic with 10 households, you still may not be able to *understand* the perspective of the households, and this is where the “continuous” nature of this portion of your journal comes in.

Keeping a Separate Journal

While the prior suggestion may be useful for recording subjective views on the process, you may include a lot more information in your journal that can’t be captured if your focus is limited to process documentation. This is actually the fun part. This is where you can be creative. This is where you can be expressive. This is where you can learn not only about the setting you’re living and working in, but you can actually learn a lot about yourself.

What can you do with a journal that you can’t do with process documentation? You can:

- Create images in your reader’s mind.
- Write descriptive profiles of families, individuals, groups, and so on.

Process Documentation (Activities Taken)	Journal Writing (Results, Reflections, Analysis)
<ul style="list-style-type: none">•9 AM: Scheduled meeting time. Only three villagers present.•9:30 AM: One of the villagers goes to find other people for the meeting.• I speak with the other two villagers about the village while waiting.•Villagers ask me many questions about where I'm from and the type of work I'm doing.•9:50 AM: The villager returns with five other villagers. We decide to begin our meeting.•Villagers present mention that the time established for the meeting is not appropriate for the type of work they do.	<ul style="list-style-type: none">• I was a little bit confused when I showed up this morning and found only three people present. During the first half-hour, nothing much happened at all. The villagers seemed uncomfortable, since they were simply sitting around waiting, but one of them decided she would go and see where the others were. While she was gone, the two remaining villagers asked me a lot about my work, so it was good to see them expressing interest. I think this was a good opportunity to engage in some trust building activities with these villagers. Even though we only talked for 20 minutes, they were actually able to give me some very good information about the village. I found out, for example that...

Figure 2: Example of Integrating Process Documentation with Journal Writing. On the left, the process documentation for that day tries to show the sequence of events, as accurately as possible. On the right, the journal writing tries to capture some of the reflections on the events of the day.

- Highlight your personal experiences or the experiences of others.
- *Illustrate* your experience.
- Engage in personal introspective reflection.
- Identify your coping strategies.
- Recognize your strengths and weaknesses.

Creating Images

We probably all agree that stories are powerful—and there is no reason that stories cannot also be used to make your reports more powerful. Bruce Garrison advises us to “remember that you are, in effect, the eyes, ears, and nose of your readers—your job is to gather an assortment of material that the readers can assimilate into an image.”¹ As with process documentation, here, you’re writing objectively, but your intent is to actually get your reader to *understand* or *feel* what you see, hear, and so on. Capture quotations as accurately as possible. Look for the details that can help you tell your story. Don’t automatically *give* conclusions at this point, and don’t give details that aren’t necessary to the image you’re trying to create. For this reason, also, refrain from using too many metaphors or “flowery” language, and instead, focus on everyday (yet colorful) language.

Profiles

As with the previous suggestion, profiles can be extremely powerful in getting your readers to better understand your experience. Your profiles can be a “personality sketch” in which you simply present a biography of one of the people you are working with. These profiles also help your reader—and you—remember that your work is about real people.

Personal Experiences

Your experience... your learning... your observations... your methodology.... These are all personal. As much as you are influenced by the information you’ve learned in your classroom sessions or during prior field visits, your experience is unique. Try to identify interesting experiences you have during your field stay that you think others can learn something from—or, for that matter, that *you* learned something from—and use these experiences as the basis for some of your journal entries.

Illustrating Your Experiences

Ok, so we are not all artists, but that shouldn’t stop you from at least exploring your artistic side. Even stick-figure drawings can be incredibly effective at illustrating something that is hard to express in words. Drawing maps can help you remember certain details including spatial relationships or even chronological relationships. If you have a camera and are in a place where camera use would be acceptable, use it! Just try to actually make a note somewhere about when and where you took the photo—as well as any subjects in the photo—so that if you decide to use it later on, you have good accurate information about your image.

Maintaining Momentum

The above examples of possible journal entries are only examples. As I’ve mentioned before, this is a personal process; for some of you the process is easy, while for others, it’s like pulling your teeth out! Hopefully, the above ideas can at least provide a source of inspiration as you sit down each night and think about what to include in your journals. You may end up not using *anything* from your

¹ Garrison, B. (2004). *Professional Feature Writing*. New Jersey: Lawrence Erlbaum Associates.

journals in your final reports, but that should not deter you from making a strong conscious effort, nor does it diminish the value of the experience in any way.

Nevertheless, it is true that even for the most dedicated of us, maintaining momentum is sometimes quite difficult, especially as we get increasingly involved in our work. Ironically, this is exactly the time that journal writing may be most important.

So, what can be done?

One of the things you'll experience in the field is group formation, and in many ways, some of the broad ideas of group formation also apply to the writing process. When writing, there's *screening* of information—to identify what is really important.... *Goal setting, establishing bye-laws, self-regulation, and quality checks* are also equally important when engaged in any form of writing. In the group formation context, these "steps" help ensure a persistently strong group. Similarly, employing such discipline in your own work would improve the quality of your work tremendously and hopefully will motivate you to maintain the momentum to write about your experiences every day.

Conclusion

Process documentation and journal writing should not be intimidating. They are tools which actually can become quite fun and almost second nature with more practice. It won't necessarily be easy—but what is at first? Of course, the value of your work is a reflection of your individual effort. You could write a process documentation which said "Went to a meeting. After meeting, talked to some families individually." This is much less useful than a process document that itemizes how the meeting itself was conducted. Similarly, you could write a journal entry that "Today I got up, had breakfast, and went for a walk through the village. It was kind of boring, so I went home and read a book." Again, much less useful in the long run—that "quiet" day could have been a good opportunity for you to do some powerful introspective reflection on your work or something similar.

So, again... making this a productive effort won't be easy. Ultimately, however, it is hard to dispute that in this case, the benefits far outweigh the costs you invest.

This document was prepared for Tata-Dhan Academy students who are completing the fieldwork or development practice segments of their curriculum. As such, some of the content specifically highlights the types of topics they would be recording about their experiences. Nevertheless, whatever your course of study—or indeed even if you are writing for pleasure!—many of the concepts here should still be easily applicable.