

THE PROFOUND FUNCTION OF DOCUMENTATION

The key to strategy is to focus on the two million villages and urban communities of the world. With that in mind, and with relatively limited resources, the question of strategy begins to take a turn. Obviously, the two million villages will not be done by this body, but nevertheless, the task is necessary and anything less is not worth a life commitment. -

Since the beginning of consciousness stories have been profound agents of social change: myths, legends, novels, etc. Possibly the edge for the Order and the Movement is becoming the storytellers, and how to do it in such a way as to change the life of the reader/hearer. Much is being said about the need to document the Human Factor, the phenomenon of change in local people and local communities, and how it is accomplished. In documenting these [earnings about engaging every person in building the future three arenas emerge: (1) calling forth the local decision to move into the future, (2) calling forth the decision of Those Who Care to participate in the demonstration of human community and (3) calling forth the decision within the structures of the world to serve local people and local communities. These stories of learnings - reports, brochures, evaluations, proposals, movies, talks, seminars, and books - are-capable of mass distribution. The experiment needs to confine in all directions with a keen eye toward the vehicles that will reach the two million villages.

Documentation is a life method: (1) telling an event, (2) articulating the specific change that occurred (statistics and method), and (3) retelling the event with its meaning revealed - breathing significance into what has taken place. In discerning the profound function of documentation it is helpful to raise the question from the standpoint of three audiences: local people, ourselves, and the world.

One of the learnings of doing social demonstration is that the dynamic of community management: finances, communications, records, public relations, etc. - is a controlling dynamic. Knowing the particulars of the situation and being able to deal with data and facts is key to being able to move ahead comprehensively. The more responsibility local people take in managing their community, the more responsibility they assume for its future realizing it is in their hands. Therefore, the challenge is to demand they learn and do everything in the projects allowing them to take charge of their own destiny.

Recording, or more specifically documenting, victories, accomplishments, campaigns, etc., is essential to providing an objective picture of the present situation, what trends are appearing and where the edge is going to be. In the task of experimenting such objectivity is crucial for future strategizing.

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The world does not believe what is possible for local people. They are considered ignorant and unwilling or incapable of changing. It has become apparent that one of the most effective ways to use documentation is to show what has taken place and how it can take place again. The bureaucratic structures of the world are already opening up to suggestions as to how they can more effectively serve local people in local communities.

The profound function of documentation is to change the world. What must be done is to document the Human Factor which allows a glimpse, an image, of how it can be done. What would it mean to create a whole new strategy for documentation that would directly effect structural change in the two million villages and urban communities across the world?

COMPONENTS OF DOCUMENTATION

At least seven types of documentation have been used this past year:

1. Program Reports: Mississippi Is Leading the Way - TM Report
2. Annual Reports: The Institute of Cultural Affairs, Annual Report '78 (USA)
3. Status Reports: Maharashtra Village Replication Project, Human Development Projects in Latin America
4. Program Evaluations: AID Formative Evaluation (AID/W), AID Project Evaluation Summary (USAID/Indonesia)
5. Pictorial Brochures: Sudtonggan Human Development Project, Two Years of Comprehensive Community Development; Human Development Projects, Four Years of Comprehensive Community Development (Philippines)
6. Financial Audits: AID/17 on the Development Program Grant for ICA: Chicago
7. Audio-Visuals: Film: The World of Human Development, Lorimor VideoTape, various HDP and TM slide presentations

Eight components of documentation that have been used this past year are as follows. Each type of documentation does not use all of the components.

1. PROGRAM ANALYSIS

Program analysis involves a description of program accomplishments in a given geography. This description commonly consists of stating the contradiction and the accomplishments, the statistical verification to back it up, and sometimes the methodology for implementing the tactics set forth in the initiating HDP Consult. Some reports have been written in the following format:

1. The contradiction and observable accomplishment, before and current.
2. How it was done.
3. Benefits to the community.
4. Shifts/changes in the people and the community.
5. Future directions or next steps.

2. LEARNINGS

Learnings refer to where the program has been blocked and what breakthrough occurred. Often this is what is being asked by such grant accountability questions as: "What have been your failures? How have you changed the way of doing your work?" A format could be as follows:

1. What was the program that was planned.
2. What was done.
3. What blocks occurred.
4. What was done to overcome these blocks or new programs created.
5. What is the current situation.
6. What are some future directions envisioned?

3. PROCESS/METHOD

The accomplishment catches the attention, but how it was done is what is convincing. Describe:

1. HDP site selection
2. TM set up
3. Consult process
4. Stake and Guild operation (community participation)
5. Community assemblies
6. TM description

4. PARTICIPATION

Participation refers to human participation in activities relating to the project or program. These fall into at least two categories: (1) local participation and (2) external participation.

1. Local participation: probably best done through a participation screen done by stakes with families listed and related to categories like stake meetings, guild meetings, preschool, workdays, etc. Distinguish number of people on salary versus number of volunteers listed in number of man hours of work.
2. External participation:
 - a. Voluntary time: by guardians for project related activities or Town Meetings done in man hours.
 - b. Services: electricity, roads, water system, etc.
 - c. Technical Expertise: agricultural training, industrial, commercial, health. etc.

5. BENEFITS

Benefits are usually written up as part of the Program Analysis (see No. 1), but are often useful to be pulled out in a later part of the report to dramatize the cumulative effect. Benefits can fall into two categories (1) direct such as new jobs, training, , etc. and (2) indirect which are side benefits, not originally planned, such as a new store resulting from increased income.

6. INPUTS/OUTPUTS (financial)

Inputs/Outputs is one of the ways of measuring the effectivity of a project or program, especially in terms of economic indicators. Original baseline data and the current data are needed for input/output data.

1. Inputs:

1. Local: the monetary investment of the community
2. External: the monetary investment beyond the community
3. In Kind: value of goods and services
4. Labor: voluntary in terms of man hours, not helpful to monetize voluntary labor

The total inputs = Cash + In Kind. Total inputs are calculated on an annual basis. Then inputs can be calculated on the basis of costs person/year and cost/family/year.

2. Outputs:

1. Agricultural Net Profits (total profits - cost of production and services = net profits)
2. Industrial Net Profits
3. Commercial-Net Profits
4. Total salaries, both in the community and external.

The total outputs = Total Net Profits + Total Salaries Total outputs are calculated on an annual basis. Then outputs can be calculated on the basis of output/person/year and output/family/year.

There has been some experimentation with the ratio of outputs to inputs in terms of a benefit ratio' but not too helpful at present. The same can be said for the concept of Gross Village Product (GVP), both of which need more work.

7. FINANCIAL STATEMENT

Financial Statement refers to the Income and Disbursements for any unit over a period of time, usually one fiscal year.

I. Income

1. Revenue from

1. Training Programs
2. Community Forums
3. Project Programs: preschool fees, health clinic fees, etc.
4. Other

2. Contributions

1. Local Community
2. Private Sector
 - a. Individuals
 - b. Foundations
 - c. Corporations
 - d. Organizations
3. Public Sector
 - a. Village Council
 - b. District
 - c. State
 - d. National
 - e. International

II. Disbursements

1. Program Services

1. Project Programs: Preschool, etc., by each program
2. Community Forums
3. Training

2. Support Services

1. Administrative and Management
2. Fund Raising

8. FUTURE DIRECTIONS

Future directions refers to the projection within the next time frame, usually one year. Continuing programs and new programs, spin offs from what has been done, and may include a budget for the next time frame, including anticipated income and projected expenses.

TYPES OF DOCUMENTATION

Description Types	Statistics	Narrative	Components	Style	Examples	Keys to Preparation
Program Reports	Charts and tables related to programs	Contextual Informative Program specific	Program description Graphics Pictures Method Vignettes Learnings Future Credits	Imaginal Dynamic	Mississippi Is Leading The Way	Initial workshop Assigned Task Force Time Limit Written notes Newspaper articles Quotations
Annual Reports	Program data Finances	Program Descriptive Agency Description	Pictures Programs Graphics Financial Statement Board of Directors Contributors	Formal Businesslike	ICA : Annual Report	Financial Statement Initial Workshop Assigned Task Force Time Limit Previous Reports Pictures
Status Reports	Statistical Tables related to programs -original baseline -current status -inputs/outputs	Accomplishments related to blocks Process of programs (method)	Program analysis Learnings Process/Method Participation Benefits Future directions	Factual with interpretive narrative	Maharashtra Report Latin American Report	Articulate the intent and the audience Assign Task Force Time Limit Site Visits Records & Data Plan
Program Evaluations	Inputs/Outputs	Current Accomplishments compared with Program Objectives	Program Analysis Learnings Process/Method Participation Benefits	Objective Futuric Implementation oriented	AID Evaluations	Clear on Grant Agreement and Proposals Original Baseline Current Status Journey of Programs
Pictorial Brochures	NIL	Descriptive	Pictures Maps Vignettes	Informative Imaginal	Sudtonggan - Two Year Philippines - Four Year	Clarity on intent and audience Statement on the journey Before/How/After pictures
Financial Audits	Budget line items with specific back up	NIL	Expenditure summary with invoiced back up	Rational Systematic	AID Audit	Detailed back up receipts
Audio Visuals	NIL	Descriptive method which is carried with the visual	Film Slides Video Tape Interviews	Illustrative reporting of the journey of Human Development	World of Human Development	Clear intent Good photography time limit

1. Assign a task force and set the deadline when the report is to be completed and published.
2. With the assigned task force create the context for the report.
3. Do a workshop with all of the involved parties, e.g. HDP report with the auxiliary, village leadership and as many villagers as possible; TM report with the circuiters, regional house, and guardians. Types of questions to be asked as follows:
 1. Who is the audience?
 2. What is the style of the report?
 3. What would the finished report look like?
 4. What are the values to be held in the report?
 5. What are the tensions to be held in the report?
 6. How would you maintain balance in the report?
 7. What type of language is to be used?
 8. What kind of graphics?
 9. What kind of photographs?
 10. Is it to be typed or typeset?
 11. Content: What needs to be included?
 12. Pass around other reports to get images of all kinds.
 13. What is the structure of the report? Come up with a chart.
 14. What needs to be the imaginal impact?
 15. What does the cover look like?
 16. What is the slogan or unifying theme?
 17. How many pages?
 18. How would this report be used in the future?
4. With the consensus now built, the task force can set about its work. It is often helpful to divide up the task force into teams, although continuing to work as a whole task force until the report is completed. Example of a four person task force could work in two teams: (1) Research and Writing and (2) Art Work and Quotations.
5. Do an initial layout of the report and write up an intent paragraph for each of the pages.
6. Brainstorm cover ideas and do a first mock up of the report?
7. Create the report consensus in the task force.
 1. Structure of the Report
 2. Each Page
 3. The content
8. Do a comprehensive mock up of the report.
9. Review the mock up with as many of the involved parties as possible. See step No. 3.

10. Do the final mock up of the report.
11. The two teams do the writing and graphics.
12. Do the costs and inking of the report.
13. Review all writing drafts and send back to the local level, e.g. guild, village council, auxiliary, TM circuiters, mayors, etc.
14. Rewrite all drafts.
15. Type up final drafts, typeset and proof read.
16. Do special art work and graphs.
17. Secure typeset materials and past up the mechanical.
18. Take it to the printer. Go over everything in detail and color key. Do final corrections.

Rational Objective

1. Introduce the varieties of types of documentation and appropriate uses for each.
2. Draw forth wisdom from the GRA relative to documenting the human factor.

Existential Aim

1. Enable the GRA to see documentation as a vehicle for showing human development as a key to local community transformation.
2. Allow GRA to experience the ease of documentation

PRELUDE	MOVEMENTS			POSTLUDE
	I	II	III	
<p><u>Introduction</u></p> <ol style="list-style-type: none"> 1. Spin: Profound function of documentation 2. What have you done or seen in TM/GSD documentatn 3. What has captured your imagination? 4. Types: samples 5. Art Form 	<p><u>How to do documentation</u></p> <ol style="list-style-type: none"> 1. Walk through: -Mississippi -Nadlapur 2. What data is needed? 3. How to collect? 4. How to keep data consistently? 5. Components of a documentation system? 	<p><u>Edge of documentation</u></p> <ol style="list-style-type: none"> 1. What are the elements of the Human Factor? 2. Discuss Bayad report. 3. Decide place and program. 4. Do one page report individually. 5. Read and share. 6. Art form. 	<p><u>Documenting the Human Factor</u></p> <ol style="list-style-type: none"> 1. Brainstorm: Elements of Human Factor documentatn 2. Swirl Gestalt 3. Paragraph writing 4. Read and cross check. 5. Edit and print later. 	<p><u>Recommendations</u></p> <ol style="list-style-type: none"> 1. Art Form Reflection 2. Implications for next year. 3. Brainstorm recommendations.
Whole Group 15 min	Whole Group 20 min	Teams 30 min	Group/Units 40 min	Whole Group 15 min

GRA: '79

ICA: Chicago

NADLAPUR HDP TWO-YEAR DOCUMENTATION METHOD

July 12, 1979

Documentation

INTENT OF THE DOCUMENTATION: The Nadlapur HDP had been adopted as a four-year project by the Vizier Sultan Tobacco Company in 1977. After 2 years they required a quantitative documentation report of the project plus budgets for the remaining two years. This request was used as an opportunity to produce a status report on the Sixteen Actuating Programs of the Nadlapur HDP as well as to hold a two-year consult. The following is the method used for documenting the project.

PREPARATION

FIELD WORK

PRODUCT

1. Team study of the Nadlapur HDP Consultation Summary Statement
 - a. Baseline Data
 - b. Contradictions Chart Paragraphs
2. Data from all previous reports was copied into notebooks - one per actuating program and studied
3. The sub-tactics (257) were aligned under the appropriate actuating program.
4. A collegium was held with the Nadlapur auxiliary in which the sub-tacts were evaluated and ranked under the following categories:
 - a. Self-sustaining
 - b. Established
 - c. Initiated
 - d. Bracketed
 - e. Not yet initiated

1. The Documentation group was divided into 3 teams: Economic; Social; Human with 9 Units: one per program arena. Each unit was given the past report data on the actuating programs appropriate to its program arena.
2. Interviews were held with villagers involved in each of the 9 program arenas. The following is a sample interview used by the Commerce Unit.
 - a. What was your daily profit at the beginning of the project? What is it now?
 - b. What has made the difference? What have you done to raise your income? What has been as a result of the project? Of other people's income rising?
 - c. Have you taken out any loans: bank? private? What other investments have you made?
 - d. What have you done with your added income? Or, what difference has your added income had on your life? What do you do now that you couldn't do before?
 - e. What are your future plans for your business?
 - f. What work have you done with the Commerce Guild?
3. Resource Input Analysis
 - a. Loans - amount; total repaid to date
 - b. Business contracts
 - c. Government schemes
 - d. Wages - amount of increase
 - e. Crop yield increase
 - f. Private Schemes
 - g. Materials and services donated

1. Paragraphs were written on each of the components of the Sixteen Actuating Programs describing what had been accomplished giving facts and figures and illustrations.
2. Charts
 - a. Family income increase
 - b. Crop yield increase
 - c. Cash Flow Chart
 - d. Resource Input Chart
3. Analytic paragraphs on the Relationship of economic to social programs and the effect of the community's self-story on what it had done.
4. Paragraph on clues to human development revealed in the shift in contradictions over the two-year period.