

Experience Documentation

Experience Documentation – three examples

Maud is working for a travel agency. She is exploring new destinations. After the trip on an island archipelago she writes a short report about her experience and adds photos. Report and photos are stored in the intranet, accessible to all office staff.

This is a simple form of Experience Documentation, lasting maybe one or two hours.

At the end of his assignment as project manager, Jimmy feels like reflecting several stations of his experience. He decides to write a series of short papers and to compile in a commented slide show the major development steps of the project. He wants to give access to some of his experiences and insights to his successor.

This is a usual form of Experience Documentation, lasting maybe some days.

SDC was phasing out its program in Ecuador. A whole team was taking up the process of documenting important parts of the country program and of the phasing out process. The form of documentation is a mix of texts, anecdotes, photos, and videos.

This is an extensive form of Experience Documentation, taking maybe some months of working time.



“A can of peas” or “Preserving experience”

Imagine you have a big vegetable garden and one year the season is just so extraordinary that you harvest as many peas as never before. What to do if you cannot keep up with eating? Of course, you may preserve them!

Experiences (or practices) can be packed in cans and preserved just as spare peas – you would just call it documentation instead of conserve. However, it is quite alike. Preserving takes time and it is worthwhile to clarify some questions beforehand, such as: Who will be interested in the conserve? What quality standards need to be assured to allow savoring later on? What about the best-before-date? And how can you assure that the conserve is not forgotten somewhere down in the basement?

All three aforementioned examples of documenting experience have in common, that experienced people document their own experience for a future use by themselves or by others. They all choose a storable form of documenting their experience, be it text in print or electronically stored, photos, video, and others. They all have possible future users in mind that should be in a position to learn something from experience and to do something in future in a better, wiser, more effective or more efficient way.

Experience Documentation is documenting now for future learning. Or, in more complete words: Experience Documentation is directed at making information available to third parties and facilitating their “learning in the future”. In addition, documentation serves accountability and archiving functions.

Learning processes are change processes: Gained insights – be it from the outside or from within an organization – are transferred and fed into relevant decision-making processes in order to contribute to improved practices.

Motivation for Experience Documentation

The trigger for Experience Documentation is primarily an institutional interest; individual motivations often play a subordinate role, although they are a driving factor for the quality of a product.

SDC as a learning organization is interested to have experiences documented and made available for others to learn from in the future. The objective is to create a retrievable memory not only for archiving and accountability reasons, but also to support future change and decision making processes and to improve future performance in similar projects and programmes.

Experience Documentation and context

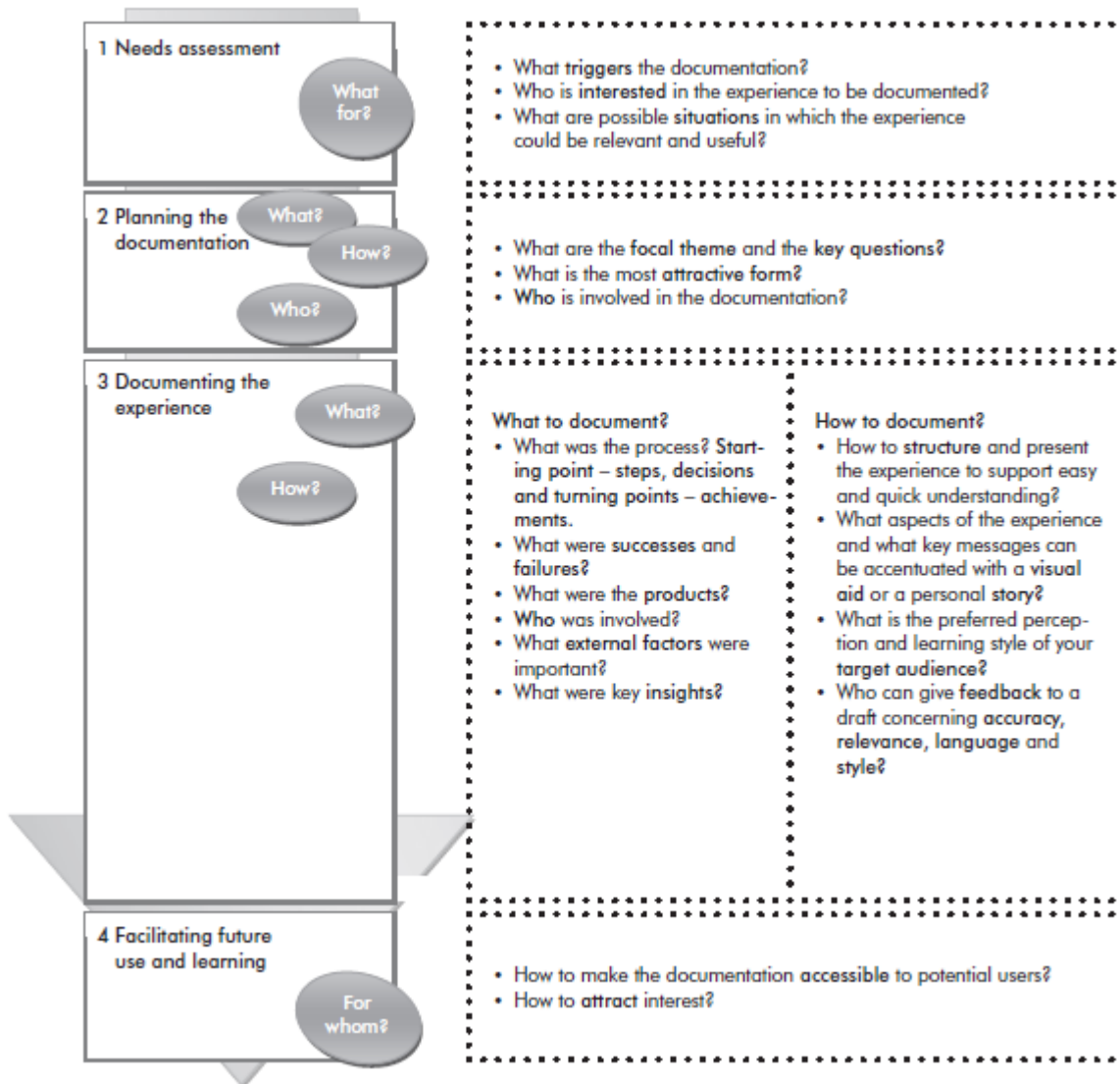
Experience is always shaped by the context in which it was made and by the people involved. Some aspects maybe extracted as general lessons, whereas others need to be understood in the light of a particular situation. The challenge in documenting the experience for others to learn from is to reflect on the specifics of the context and to describe the key factors that influenced the process and outcomes.

In documenting the experience they get detached from their context (“deconstruction”); good practices and lessons to be learnt are formulated. In another context, these practices and lessons are built in a new learning and change process (“reconstruction”). Storytelling can be seen as a method of comprehensive experience transfer – as an alternative to the more academic deconstruction / reconstruction process.

Process of Experience Documentation

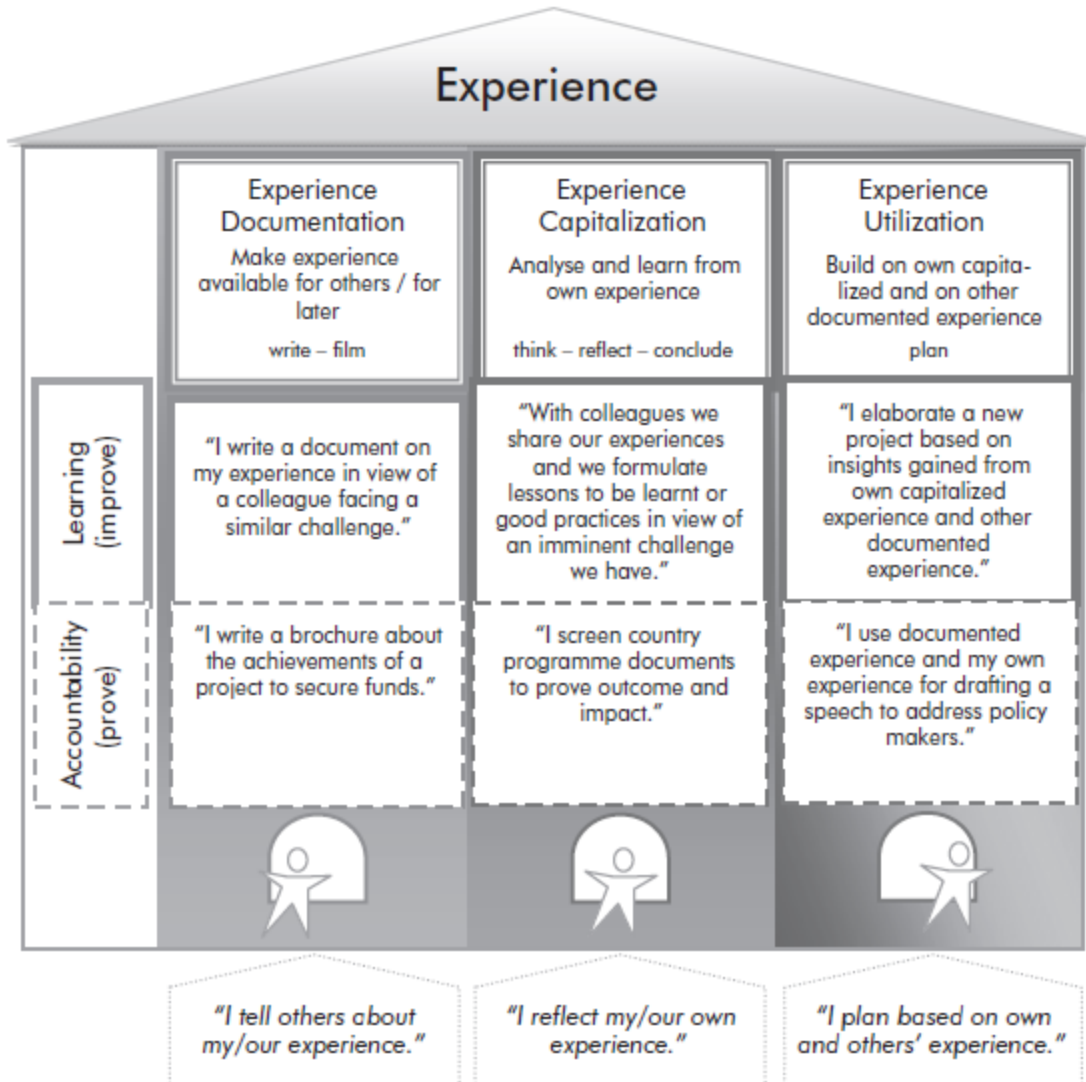
As shown in the initial examples, Experience Documentation can be an individual or a team process, lasting some hours or some months, varying heavily in the degree of interaction and the kind of product.

The essential steps of Experience Documentation are visualized in the following graph.



Differentiate Experience Documentation – capitalization – utilization

The table below makes the difference between Experience Documentation and Experience Capitalization. With the third aspect, Experience Utilisation, emphasis is given to taking up the experiences (documented and capitalized) in planning and change processes. The interaction between the three – Experience Documentation, Capitalization and Utilisation – is illustrated subsequently with a hiking story (see next page).

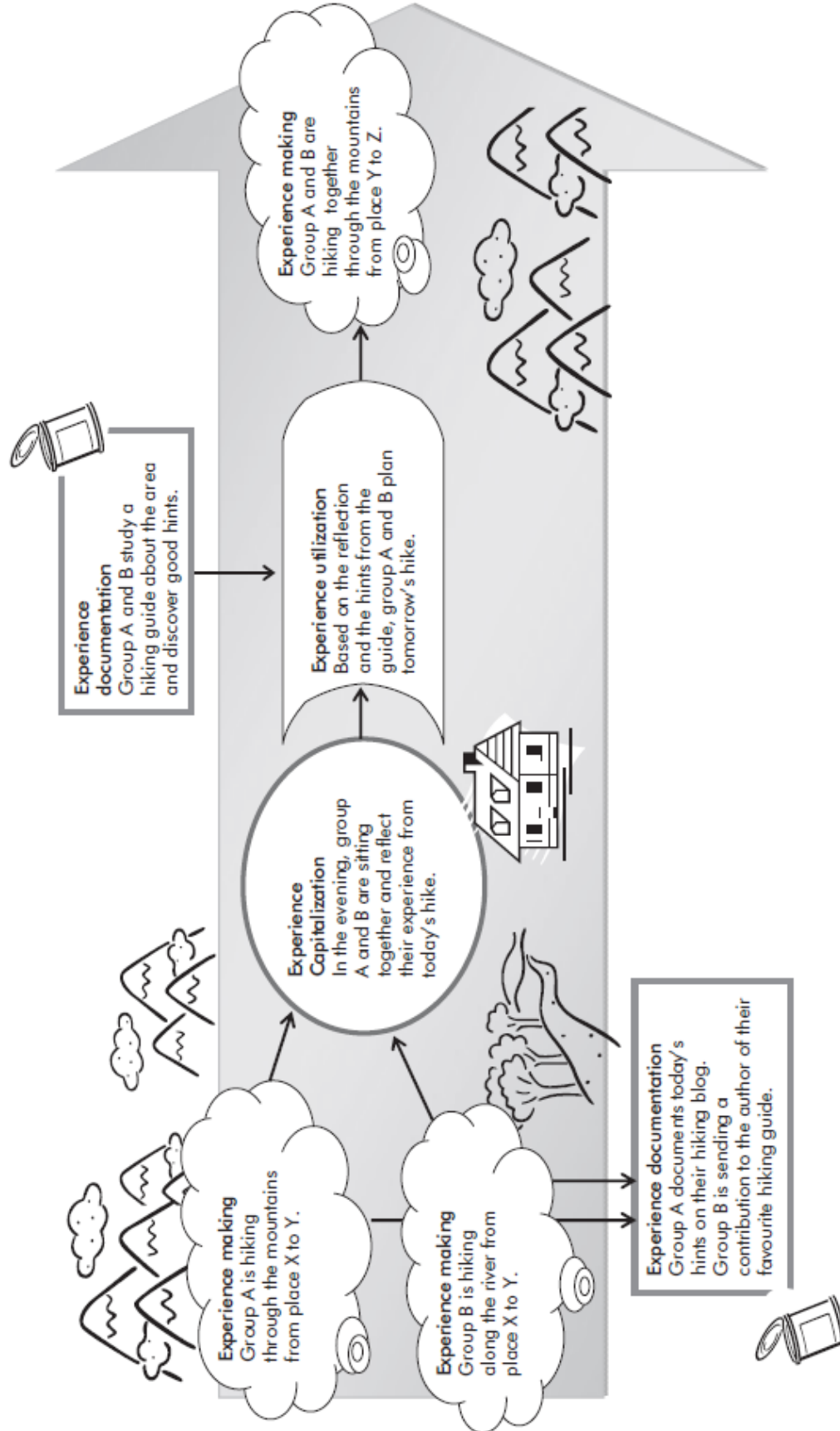


Experience documentation is directed at "learning in the future" and making information available to third parties. The objective is to create a retrievable memory. In addition, documentation serves accountability and archiving functions.



Experience capitalization aims at changing one's own practices or institutional structures, "learning now for the future". It refers to the transformation of (individual and institutional) knowledge into capital by those directly involved in order to change a collective, institutional practice. Experience capitalization is a learning process and paves the way for change – or is a partial step in a process of change already in progress.






Experience utilization means designing and performing planning processes taking in consideration lessons learnt and good practice based on own and others' experiences.






Experience making, capitalization, documentation and utilization – the example of a hiking tour



Documenting experiences for future learning in a more detailed presentation

1 Needs assessment		
Step	Guiding questions	Tips on how to do it in practice
<p>1.1 Trigger and motivation</p> 	<ul style="list-style-type: none"> • What is the motivation for documenting my or our experience? • Who is the driving person for the documentation process? (Own motivation or order/individual or team). • Are there interested people? 	<p>Possible situations triggering an experience documentation:</p> <ul style="list-style-type: none"> • End of project or programme. • Responsible and/or experienced person leaving the position (interest to save knowledge). • Interest to replicate or scale-up. • Interest in experience for policy dialogue. <p>Clarify your aim: What is predominant "learning and improving" or "accountability and proving"?</p> <p>Declare the aim at the beginning to all involved. For learning create the space and readiness for a self-critical and open dialogue.</p> <p>Check for push or pull: What is predominant: the wish to send or the need to receive?</p>
<p>1.2 Future learners/users</p> 	<p>Consider the interest you have perceived so far</p> <ul style="list-style-type: none"> • Who has shown interest in my experience so far? • In what aspects of my experience have they shown most interest? • What were the most common questions asked? <p>Check out other potential target audience</p> <ul style="list-style-type: none"> • Who else could be interested at present/in future to learn from my experience? • What experience of mine could be most important and relevant for this group of actors? • What questions would they ask me? <p>Think back to when you started</p> <ul style="list-style-type: none"> • What questions did I ask myself at the beginning? • If I imagine being at the start again, what would I like to know better? • What would be my questions? 	<ul style="list-style-type: none"> • Contact potential users/learners to learn about their concrete questions and needs (including context information). • Imagine all different perspectives to look at your experience and develop questions as a guide for the documentation.

1 Needs assessment (condt.)		
Step	Guiding questions	Tips on how to do it in practice
1.3 Context for future learning 	<ul style="list-style-type: none"> In what situation(s) could my experience be of interest for others? For how long is this experience relevant? What timeframe will I consider for the documentation? 	<ul style="list-style-type: none"> Check use of documented experience for different roles (who can do what with the documented experience?), at different levels (micro, meso, macro level), and for different time horizons.
1.4 A possible good result 	<ul style="list-style-type: none"> What will a good result look like concerning product, documentation process and effect? 	<ul style="list-style-type: none"> Check for convincing products and desired impacts. Ask yourself what you would like future users to say about your documentation. Think about unconventional forms of documentation (a report/brochure is not the only possible way of doing it).
2 Planning the documentation process		
Step	Guiding questions	Tips on how to do it in practice
2.1 Focus 	<ul style="list-style-type: none"> What is the focal theme of the documentation? What are the key questions I want to answer based on my experience? What aspects are important? 	<ul style="list-style-type: none"> An experience can never be documented with all its aspects. Defining 1 core topic and 5 (-10) guiding questions help to be specific and to reach desired depth in the documented issue.
2.2 Form 	<ul style="list-style-type: none"> What is the most attractive and appropriate form? How can the experiences be structured and presented? 	<p>Print: Brochure, leaflet, book with/without illustrations.</p> <p>Film and picture: Video, slide show, cartoon, combined forms. Presented on a website or as a "hardware" product.</p> <p>Standardized documentation (e.g. Wocat) or free forms.</p>
2.3 Actors and Roles 	<ul style="list-style-type: none"> Who is involved in the experience documentation? How are the roles defined? Who is the process owner? Who are the experience holders? Who is documenting the experience? 	<p>"Do it yourself": Own documentation (self-reflection of individual or team)</p> <p>"Coach": Accompanied process</p> <p>"Journalist": Outsourced work</p>

3a Documenting the experience – What?		Tips on how to do it in practice
<p>Step</p> <p>3.1 Process</p> 	<p>Guiding questions</p> <p>Starting point</p> <ul style="list-style-type: none"> Where did I start and where did I want to go? What did I consider at the beginning? <p>Process</p> <ul style="list-style-type: none"> What were the most important steps and milestones? What went differently than planned? Why? What difficulties did I face? What ways out did I try? What worked and what not? What decisions were taken when and why? <p>Achievements</p> <ul style="list-style-type: none"> Where did I get to? What have I achieved? 	<ul style="list-style-type: none"> Describe your own positive and negative practical experience rather than putting forward ideas and theories. Describe important moments of decision making. Insert practical examples to explain contextual elements.
<p>3.2 Successes and failures</p> 	<p>Successes</p> <ul style="list-style-type: none"> What worked really well? What am I proud of? <p>Failures</p> <ul style="list-style-type: none"> What did not work well? What adjustments according to the first plan were made during the process? What would I do differently another time? 	<p>Cultivate "error culture": Errors and mistakes can be seen primarily as a source of learning, not as something that needs to be hidden.</p> <p>Moments of learning: "That almost went wrong" – and what you have learnt.</p> <p>Unexpected side effects are at times the biggest success (and effects) of a project.</p>
<p>3.3 Results/products</p> 	<ul style="list-style-type: none"> What results have been attained? What products were produced? 	<ul style="list-style-type: none"> Results and products are normally less interesting compared to the process.
<p>3.4 People</p> 	<ul style="list-style-type: none"> Who participated in the experience? What roles did the people have? With which partners did I collaborate? How do I describe the collaboration? What are the experiences, stories and views of other involved actors? 	<ul style="list-style-type: none"> Insert personal views about core issues in boxes. Add contact addresses (but check probable expiry date of the addresses).
<p>3.5 Context</p> 	<ul style="list-style-type: none"> In what context must the experience be seen? Which key factors influenced the process, the results and the decisions taken? 	<ul style="list-style-type: none"> Restrict to essential elements of the context that had a decisive on process and results.