

10 Tips for Managing Data to Document Learning and Change

It can be challenging to collect meaningful data from participants while facilitating dialogue. There we stand at the flip chart with markers in hand, racing to get their insights up on the wall while the dialogue flows past us. The conversation starts to go off track while we try to recall what someone said a minute ago. And the chart starts to look like a jumble of words. It is important to remember that the conversation itself is a meaningful product! Facilitators need to be intentional about what gets documented and know that it's not necessary to capture all that is said. Here are 10 helpful tips for documenting ideas, decisions, and insights.

1. **Use participants' own words.** If you don't have a scribe, consider having the participants write it out themselves and post their work. Using a co-facilitator for this role can also be effective and easy. *Remember, ask learners to repeat when something is unclear: "What word did you use just now to describe the theory? I want to capture your thought exactly."*
2. **Ask people to be specific and descriptive in their answers.** People tend to synthesize their thinking to the point where it can lose meaning. To get important detail in learners' work, you may need to ask questions of clarification and probing questions. Setting the task clearly is critical. *Remember, be specific in your instructions: "Write the feedback you are hearing about the method your organization is using. Be as comprehensive as possible."*
3. **Leave space between points as you scribe.** As people inquire into the point you can use this space to add a richer description and fill in the details. As you continue to unpack ideas on a chart or visual you will want to add words, phrases, pictures, and thoughts. *Remember, be transparent: "I am going to leave lots of space between your ideas so we can add thoughts and examples as we unpack this throughout the day."*
4. **Make it moveable.** If you will be categorizing, capture data on Post-it Notes or cards—one idea per note—so that they can be easily clustered or moved into columns. Let participants do the clustering, sorting and meaning-making when possible. *Remember, be clear: "Write one idea per Post-it Note so we can move ideas around and categorize after we hear everyone's input. We are going to be working with this for the next hour or so."*
5. **Label your charts.** It may sound obvious, but a flipchart without a title may be hard to identify by the next day and when you need to use the data again. You and the group need to know what a collection of data on a chart is about, at a glance. *Remember, details count: "When you are finished add a title to the top of your chart and your names at the bottom. We want to remember whose ideas are on each chart."*

6. **Use graphic organizers.** Graphic organizers help individuals and groups to make sense of the data they generate. Some examples of these include: T-charts, mind maps, matrices, Venn diagrams, timelines and pie charts. *Remember, maximize this tool: “Use the full paper to make your chart and write large enough so that we can read your ideas from a distance. This will be important for our further work together.”*
7. **Leverage technology.** For some data, typing it directly into a computer (possibly visible to all on the screen), is a good way to scribe. Only use this if the data does not need to be visible in the room later. If you will need to refer back to it with the group, put it on a wall or flip chart. *Remember, technology is not our enemy: “We are going to collect your ideas on the screen so I can email it to everyone during the break and we can work all work on unpacking the idea on our computers during our working session this afternoon.*
8. **Put the data in their hands.** Participants will feel more accountability for the product to the extent they own it. Invite them to write, post, enrich, sort, cluster, categorize, prioritize, eliminate, and add to the data. This keeps them meaningfully engaged, adds more credibility to the outputs, and makes your job easier. *Remember, be prepared: “You will find all you need to do this work on your tables: markers, Post-it Notes, and scissors.”*
9. **Keep visuals up that you plan to continue to work on and refer to.** Visuals are not to be treated like wallpaper, and should only be kept when/ if it will further the learning and work that needs to be done. Be selective in what you record, how and how long you keep it up. *Remember, refer to what has been kept visible: “Remember our work on this yesterday [gesturing to the chart]? How does that inform this new model?”*
10. **Be transparent and clear.** Whether you are collecting data verbally or in writing, in advance or in the moment, individually or as a group, be clear what will be collected, when, where and by whom. Clarity and transparency on process and expectations will help ensure rich data and minimize assumptions. *Remember, avoid “faci-pulation” (facilitation + manipulation = faci-pulation): The process of facilitating decision-making that will not be used later. Be clear who has deliberative or decisive voice and what will happen next.*