

Recording a Deliberative Forum on Flipcharts

Purposes and Benefits. Recording a deliberative forum on flipcharts is important in supporting and promoting the deliberative process:

- Recording helps the group keep on task.
- It helps the moderator and forum participants see the progress of the deliberation. For example, if the flipchart on Trade-offs has no comments recorded on it, it is a signal to the moderator and participants that trade-offs still need to be identified in the forum.
- It reminds participants of what has been said in the forum and provides a record.
- It communicates to the participants that their comments are being heard.
- Flipchart recording lets participants revisit key thoughts as they deliberate during the forum.
- It can be a tool to ensure that balanced views are being surfaced.
- It provides the moderator and recorder with additional information in preparing the post-forum report.

Recording a deliberative forum is optional, but the benefits of recording usually make it very worthwhile. **Whether you choose to record or not** may depend on the following:

- Number of forum participants and planned purpose of the forum.
- Whether a qualified person is available to be the recorder.
- The size of the room, whether the recording will be visible, etc.

At a minimum, the final portion of the forum (Reflections) should be recorded to give the group a way to create their shared perspective – as well as a tangible product of their work.

Cautions. If done poorly, recording can:

- Focus attention on the moderator instead of letting the participants talk among themselves.
- Slow down a conversation and/or discourage spontaneous interchange.

A skilled forum recorder can minimize these concerns.

DIFFERENT STYLES OF RECORDING

There are different styles of recording, including the following:

- Record only those comments that reflect deliberation – the key ideas, not a verbatim transcript. They can be recorded in these ways:

Method A. In advance, label flipcharts with “Approach (1, 2, or 3) – Appeals & Concerns”, “Tensions/Dilemmas”, “Trade-offs”, “Values”, “Costs and Consequences”, “Common Ground” and other indicators of deliberation. During the forum, write participants’ comments on the appropriate flipchart.

Method B. Write participants comments on unlabeled flipcharts, leaving room on the left margin for the moderator (during the Reflections time of the forum) to have the group make its own decision on each comment as to whether it was a value, a trade-off, etc. Mark their decision in the left margin. [Example: CG in green for Common Ground; V in purple for values, etc.)

- Collect comments in appeals and concerns columns side by side for each approach – a “T” design.
- Just record values rather than appeals and concerns.
- Highlight only the values and/or the key tensions.
- Record every comment (“straight recording”), similar to court reporting, possibly switching pens to differentiate between speakers.
- Other variations of the above.

For new moderators and recorders learning the process of conducting successful deliberative forums, **it is highly recommended that the recorder use Method A or Method B.**

STRATEGIES FOR RECORDING

Recording can be an integral part of a successful forum, and it benefits from careful thought and planning. Here are some suggestions for fulfilling the role of a forum recorder successfully.

Read the issue book. It is important that you are familiar with the material. Your knowledge of the issue and the possible approaches being deliberated will aid your listening skills tremendously, ensuring that you will be able to “hear” and “distill” appeals and concerns, consequences, values, conflicts, tensions and trade-offs.

[Optional] Enlist the help of an assistant recorder to help with listening. Some recorders like to have a second person to help with listening as well as clarifying where to record the participants’ comments. This person usually stands to the side with the recorder throughout the deliberation and is not part of the deliberative forum participants. Forum participants generally speak without necessarily thinking about how their comments are going to be recorded. For example, they may begin talking about one point and meander around to another point. Often a moderator will ask a question, but a participant may share comments that do not address the question. A listener can help the recorder clarify what was said and determine where the comment(s) belong on the flipcharts.

In advance, meet with the moderator to determine how the recording will be done:

- How the recorder will be introduced:
 - Will you introduce yourself or will the moderator introduce you?
 - How will the participants be encouraged to clarify something or to correct you if you do not capture their thoughts appropriately? Will the moderator explain this or will you?
 - The recorder is neutral (as is the moderator) – this must be clear to participants.
 - The recorder is capturing only the key comments that relate to deliberation, such as appeals and concerns, tensions/dilemmas, trade-offs, etc.
 - The recorder will make every effort to use the participants’ words, but may need to abbreviate participants’ comments.
 - Participants may instruct the recorder to change a recorded comment if the recorder did not capture it as a participant intended.
- Should you assist with distributing/collecting the pre- and post-forum questionnaires, setting up the video, putting up the posters, etc.?
- Where will you record in the forum and where will you post the flipcharts in relationship to the moderator and to the participants?
- How many easels would you like to use?
- Who will provide the easel(s), flipchart(s), markers, tape, etc.? (see Recorder’s Kit below).
- Can you tape the flipchart recordings on the wall at the forum site?
- Will the moderator call on you to briefly review (3-4 minutes) the flipcharts before the “Reflections”?
- Which of you is responsible for writing up the flipchart notes after the forum? What is to be done with the flipcharts afterwards?

Prepare a Recorder’s Kit. While conveners may supply markers/paper/easels and NIF posters (“Reflections” and “Guidelines”), some recorders prefer to use their own so they always know the supplies are in good condition:

- Markers (some manufactures make markers specifically labeled for flipcharts):
 - Use bold colors (blue, brown, purple, green, red, and orange). Pastels and yellow are too pale.
 - Have at least 2 black markers on hand – that’s the color you’ll use the most.
 - Bullet-tip markers are preferable to chisel tips.
- Flipchart easel and pads:
 - Tripod easels with a solid back are heavier but sturdier than those with only a cross bar at the top.
 - Flipchart paper comes with or without an adhesive strip across the top
- Masking tape, if not using paper with adhesive strips
- Free posters from NIF: “Guidelines”, “Reflections”. [Tip: Apply 2”-wide clear shipping tape on the front and back of the top and bottom edges of the poster to protect them during re-use. Also, posters come with the content folded to the inside; apply a typed label to each poster so you don’t have to unfold them to see which is which.]

Prepare flipcharts prior to the forum when using Method A. Use headings or titles on each flipchart. Consult the following fact sheet for tips on hand lettering styles for readability and legibility:

Extension Fact Sheet T-8203 “Do it yourself Visuals” from the Oklahoma State University Cooperative Extension Service is available at <http://pods.dasnr.okstate.edu/docushare/dsweb/view/collection-264>

For example, the fact sheet talks about how tall letters should be and it notes that printing the participants’ comments in upper and lower case is preferred over script or printing in upper case letters only. It is acceptable to print headings in upper case only.

Before the forum starts, prepare flipcharts with the following headings. This could take 20 minutes.

1. **“OPTION 1: etc.”** (Figure 1 below). Write the number and name of the option/approach (ex. Option 1: Demand Citizen Responsibility.). If the name of the option is long, shorten to key words only. Below this, draw a horizontal line across the page and start two columns with the following headings: Appeals (left column, green marker) and Concerns (right column, red marker). You can vary these words, as per suggestions given in the **“Record during the forum”** section.]
2. **“COMMON GROUND FOR ACTION”** (Figure 2 below)
3. **“CONSEQUENCES”** (similar to Figure 2 below)
4. **“TENSIONS/DILEMMAS . . .on the other hand. . .”** (similar to Figure 2 below)
5. **“TRADE-OFFS . . .even if. . .”** (similar to Figure 2 below)
6. **“VALUES”** (similar to Figure 2 below)
7. **“REFLECTIONS”** — flipcharts that closely parallel NIF “Reflections” poster. Before preparing these flipcharts, talk with your moderator. Many moderators do not ask the “Individual Reflections” questions because they prefer to focus the closing on questions about common ground, trade-offs, etc. Ask your moderator if s/he will use all the questions on the NIF “Reflections” poster; if so, ask if the moderator wants you to record responses to all the questions or just those comments related to **flipcharts 2 through 5, which you have already created**. If your moderator wants you to record the comments from the “Individual Reflection” and “Next Steps” questions on the NIF “Reflections” poster, prepare flipcharts similar to Figure 3 below, leaving about 12” of space below each subheading:

Notice that the “Group Reflections” questions on the green/black/white NIF “Reflections” poster address common ground, tensions, and trade-offs, which you have already prepared (**flipcharts 2 through 5 above**).

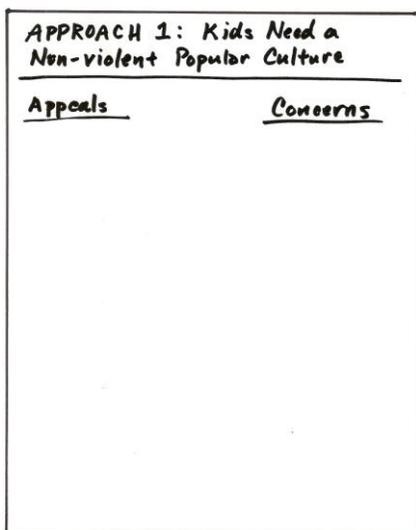


Figure 1



Figure 2

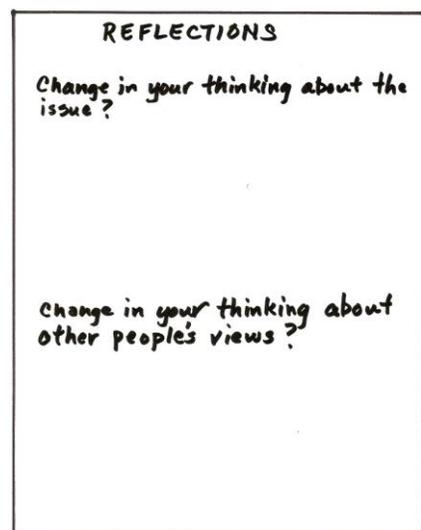


Figure 3

Arrive early and set up. To be as neutral and unobtrusive as possible, arrive early to do the following:

- Set up your easel(s).
- Tear off strips of tape. Attach them to the easel or some spot where you can get to them quietly and quickly.
- You may want to post the following flipcharts on the wall if you do not have separate easels for them: TRADE-OFFS, COMMON GROUND, TENSIONS/DILEMMAS, COSTS AND CONSEQUENCES, VALUES, REFLECTIONS AND NEXT-STEP REFLECTIONS. You want to avoid noisily flipping through the easel pad to find the correct sheet if, for example, a participant identifies a trade-off while the group is deliberating Approach 1.

Record during the forum, starting with the deliberation of the approaches (do not record the Opening, including the Personal Stake or other icebreaker). Be sure to capture the benefits/appeals and concerns, consequences, tensions, and trade-offs in a succinct, synthesized manner. Recorders find it helpful to provide headings for these on the flipchart. For instance for the supportive comments that participants identify for a given choice or approach, use a subhead such as *appeals, likes, attractive, or benefits*. For concerns that participants have about an approach, try *concerns, dislikes, or pitfalls*. Sometimes trying different words can strike different chords with the forum participants. It is best to avoid using *Pros* or *Cons* because they tend to be polarizing terms.

Record key points; not every comment made. You do not have to record every single comment. Rather, listen for what people hold valuable, as well as areas of tension and any trade-offs people are willing or not willing to make, noting advantages and disadvantages to each approach. Have the moderator explain your role during the forum welcome so participants are not offended if you do not write down every comment. As an example, a participant may relate a personal story leading up to the bottom line, such as what appeals or concerns him/her about an approach; listen carefully and record only the appeal or concern succinctly – the personal story does not need to be recorded.

Be objective as you record the participants' comments.

- Use the participants' words as much as possible.
- If you're not sure where to record a comment, discreetly ask the moderator for assistance or the participant him/herself, depending on the strategy on which you and the moderator have agreed. The moderator can ask the participant if the comment is an appeal, concern, or other type of comment. An assistant recorder/listener can help with this as well.

More tips:

- Alternate colors of markers to indicate different speakers or different points. For example, under Approach 1, write the first "appeal" in green, the second in black, then alternate between green and black for the rest of the column. Do the same in the "concerns" column, using red and black.
- Use a bullet or dash at the beginning of each recorded comment.
- Bring along with you an extra person to help with listening as well as posting the flipcharts. Explain the need to be quiet and unobtrusive.

Stay out of the way of deliberation. Approach your job quietly, as any good listener would. You would not want your physical movements to distract from the deliberative process.

Support the moderator / give the moderator some cues. Your recording can be helpful in supporting the moderator's role. If participants are not confronting trade-offs because the moderator has not yet introduced them, you might go to your "trade-offs" flipchart (perhaps circling the heading or putting a star beside it) as a way of gently reminding the moderator to get back on the deliberative track. Only do this if you have worked it out strategically with the moderator ahead of time. Write down the participants' questions – the great unanswerable ones that are important to confront.

Follow through with post-forum responsibilities. The recorder's responsibilities after the forum will vary based on what has been discussed with the forum convener(s) and moderator, but typically include the following:

- Before removing the pages posted on the wall, number each page in an upper corner to help keep them in order (this helps with transcribing).
- Remove the pages from the wall, collect them in order, fold to approximately file-folder size, and write the following on the outside:
 - Date of the forum and names of moderator and recorder.
 - Issue deliberated in the forum.
- Transcribe the flipchart recordings using word processing software or by hand, and give the material to the convener(s) or moderator.
- Be available to assist the convener and/or moderator in preparing a written report on the forum outcomes.

Adapted from material developed by Ruth Yellow Hawk and Renée Daugherty