Templates for note taking

Documentation of the results of the PACDR process is key to using the knowledge and information for further community action. After each exercise, note takers should summarize and document the results. The reporting templates cover the key aspects of each exercise and help note takers produce exercise reports for the community and for the facilitation team and supporting organizations.

The templates contain four sections. Sections A, B and C cover general information and the main findings of the exercises. These sections are essential parts of the reports for the community.

The information in Section D is potentially confidential and should only be included for internal reports. Organizations conducting or supporting PACDR processes can use this material for their internal reports, for process monitoring and steering, for internal process evaluation and discussions and for the preparation of the exercises that come next.

The supporting organization and the community determine the language(s) for the final documentation. This will depend mainly on how to use it during and after the assessment. It is also important to decide which information should be public (included in sections A, B, C) and which information can only be used for internal purposes (noted separately).

**Structure of the exercise report templates**

1. **Information**
2. **Main findings of the exercise**
3. **Main findings of the discussion and guiding questions**
4. **Process appraisal, additional information, open questions, key insights (confidential or internal use)**

* Working conditions, atmosphere (open, interested, shy, tense, dominated…)
* Degree of participation (men, women, leaders, ordinary people, old, young…)
* Strong and weak points
* Degree of understanding of the issue and the instructions
* Quality of facilitation and of interpretation
* Relevance for the participants
* Important aspects not mentioned by participants (not aware, too problematic, risky, conflict avoiding, taboo…)
* Open questions, things to do, follow-up
* Key insights

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| **Exercise 1: Hazard map** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| 1. **Main findings of the exercise** |
| * Most important livelihood assets and resources: |
| * Most important hazards mentioned: |
| * Resources threatened by hazards: |
| * Gender considerations: |
| 1. **Main findings of the discussion and guiding questions** |
| * Comparison of the maps: Similarities, differences, missing aspects: |
| * Reasons for differences in the maps: |
| * Changes of hazards over time: Occurrence, frequency, intensity: |
| * People most affected: |
| * Access and control over resources: |

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| 1. **Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 2: Seasonal calendar** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| 1. **Main findings of the exercise** |
| * Main activities and events: |
| * Main differences between the current situation and the situation 30 years ago: |
| * Periods of stress, hazard, disease, hunger, debt, vulnerability…: |
| * Gender considerations: |
| 1. **Main findings of the discussion and guiding questions** |
| * Comparison of the calendars: Similarities, differences, missing aspects: |
| * Reasons for differences in the calendars: |
| * Changes in seasonal activities and events: |
| * Reasons for the changing situation (climate change, conflicts, increased pressure on resources, politics…): |
| * Future scenarios (improvement, no change, deterioration): |

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| 1. **Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 3: Prioritization of hazards** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| **C. Main findings of the discussion and guiding questions** |
| * Most difficult moments in the community and hazards they relate to: |
| * Changes and trends of hazards, vulnerable periods, etc., and the reasons for these: |
| * People most affected: |
| * Ranking of hazards: |
| * Magnitude and frequency of hazards: |

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| **D. Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 4: Vulnerability Matrix** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| 1. **Main findings of the exercise** |
| * Hazards most harmful to the community livelihood resources or assets: |
| * Livelihood resources or assets most affected by hazards: |
| * Gender considerations: |
| 1. **Main findings of the discussion and guiding questions** |
| * Comparison of the matrices: Similarities, differences, missing aspects: |
| * Reasons for differences in the matrices: |
| * Reasons some resources or assets are strongly affected, other less so or not at all: |
| * Consequences for the community when basic resources or assets (*land, agriculture, livestock, health*) are strongly affected (*hunger, diseases, poverty, conflicts, migration, solidarity, aid…):* |
| * People most affected (*landless, handicapped people, elderly, migrants, indigenous, etc.):* |
| * Why are some hazards more harmful than others? |
| * Where and how has the vulnerability of the community increased in recent years? |

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| 1. **Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 5: Review and evaluation of local responses** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| 1. **Main findings of the exercise** |
| * Most important negative impacts of hazards: |
| * Most effective and sustainable local responses to these impacts: |
| * Gender considerations: |
| 1. **Main findings of the discussion and guiding questions** |
| * Comparison of the tables: Similarities, differences, missing aspects: |
| * Reasons for differences in the tables: |
| * Additional local responses not mentioned in the groups (*practiced only by very few people, culturally not accepted, taboo…)*: |
| * Impacts with satisfying responses, impacts with weak responses: |
| * Overall result as to effectiveness and sustainability: |
| * People with low capacities to respond to negative impacts (*landless, handicapped people, elderly, migrants, indigenous, etc.)*: |
| * Hazards and negative impacts where the community wants to improve their responses: |

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| 1. **Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Summary: Review and conclusions** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| **C. Main findings of the discussion and guiding questions** |
| * Particular local challenges (*conflicts, land issues, controversial large-scale developments*): |
| * Degree of practice of responses (spreading): |
| * Reasons for responses not practiced (obstacles): |
| * Table: Severity of impacts | Strength of existing responses | Need for action |
| * Responses to be spread widely: |
| * Inadequate local responses: |
| * Areas where action is needed: |
| * Gender considerations: |

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| **D. Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 6: Community adaptation goals** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| 1. **Main findings of the exercise** |
| * Short-term goals (1–3 years): |
| * Long-term goals (5–10 years): |
| * Gender-specific goals (if any): |
| 1. **Main findings of the discussion and guiding questions** |
| * Impacts most critical to women, men, minorities: |
| * Comparison of the goals: Similarities, differences, missing aspects: |
| * Reasons for differences in the goals: |
| * Merged goals: |

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| 1. **Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 7: Adaptation strategies, obstacles and opportunities** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| 1. **Main findings of the exercise** |
| * New adaptation responses and strategies (effective, sustainable): |
| 1. **Main findings of the discussion and guiding questions** |
| * Comparison of the results: Similarities, differences, missing aspects: |
| * Reasons for differences in the tables: |
| * Obstacles for implementing the new responses and strategies: |
| * Possible negative effects (conflicts between farmers and pastoralists; people living upstream, downstream; environmental impacts): |
| * External support needed (knowledge, funds, resource people, government support): |

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| 1. **Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 8: Identification of co-benefits** |
| 1. **Information** |
| Date: Location:  Names of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| **C. Main findings of the discussion and guiding questions** |
| * Co-benefits (positive indirect impacts): * Environment, ecology, climate (biodiversity, forest, soil, erosion, GHG mitigation) * Socioeconomic (gender justice, pro-poor, income generating) * Political (empowerment, participation in decision making, advocacy) |
| * Negative indirect impacts: |
| * Methods and approaches to increase co-benefits: |

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| **D. Process appraisal, additional information, open questions, key insights (confidential)** |
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| **Exercise 9: Development of an action plan** |
| 1. **Information** |
| Date: Location:  Names and roles of the facilitation team:  Number and characteristics of participants (gender, representatives, minorities etc.): |
| **C. Main findings of the discussion and guiding questions** |
| * Short-term activities: |
| * Long-term activities: |
| * Individual or household activities: |
| * Community activities: |
| * Activities to be implemented with locally available resources: |
| * Activities where other stakeholders are needed (resource persons, government, funders): |
| * Commitments of participants and stakeholders: |

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| **D. Process appraisal, additional information, open questions, key insights (confidential)** |
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