

# Social Reporting Toolbox: social reporting guidelines for event organisers and social reporters

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by Bev Trayner and David Wilcox, with special thanks to Josien Kapma

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## About the authors and how they came together:

Beverly Trayner (<http://eudaimonia.pt>) has been consulting for the ESF Community of Practice on Innovation and Mainstreaming ([innovation.esflive.eu](http://innovation.esflive.eu)) for two years. She is also a community organiser and facilitator, with a special interest in social learning systems. Beverly invited David Wilcox from UK, who coined the expression social reporting (<http://socialreporter.com/>) some years ago and with whom she has worked with on different projects over the years. Together they did the social reporting for the innovation mainstreaming community of practice in October, November and December 2008. Beverly also invited Josien Kapma (<http://kapma.wordpress.com/>) who is Dutch and living in Portugal to join them. Josien and Beverly have also worked together on several projects, including the social reporting of an EQUAL project event called Anim@Te in November 2008.

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## Introduction

This toolbox for social reporting is aimed at people organising a face-to-face event and who want to use new social media for both capturing moments of the event and for stimulating different types of conversation.

Events provide good opportunities for social reporting before, during, and after the day. They push you to think about reaching people "in the room" and those people who could not make it.

The aim of social reporting is to create an informal narrative to the event, which could complement the formal results or conclusions of that event. The idea of social reporting has been growing in response to two important changes in the organisation of today's types of events:

- The first is the explosion of new and free online tools that opens up communication and the publishing of information of different types (such as text, photographs and video recordings) in different ways and to different types of people.
- Equally important as the new ways of publishing is the growing recognition that many insights and learning that happen at face-to-face events take place during informal conversations and not necessarily in the formal presentations or sessions.

Social reporting aims to try and stimulate and capture some of these improvisational conversations as a way of bringing more voices to the table and of surfacing some of the stories that help give context to the event.

The ESF is holding an event in Lisbon to publish the results of the work of EQUAL. They have people coming from different parts of the world to give presentations of their work on social innovation and integrating people in the work place. Local Portuguese groups will also be presenting their work and products of the previous EQUAL programmes. It is agreed that there will be a formal capturing and harvesting of the results of the event as well as some social reporting for capturing and immediate publishing of the informal nuggets of conference participants.

This was the context in which this social reporting toolbox has been written. It is not a document of best practice, nor even of good practice. It is an account of how we are doing things, sharing what has worked what has not worked. We offer it both as a practical document for people who want to know what tools and processes we have used, and as a way into thinking about the purpose and approach of social reporting. In our experience it is not easy to separate tools, processes, purpose and approach and it is more helpful to think of them together. It is also an invitation to participate in a conversation about social reporting and how it has worked for other people and in other contexts.

We begin the document with a discussion about the broader philosophy and application of social reporting as we think that this philosophy is useful for considering how to use social reporters at an event. We then go through what to do in the four phases: planning, setting up, on the day and after the event. Then there is a

section on the different roles of people involved in the social reporting process, some concluding reflections and pointers to further reading and resources.

## About Social Reporting

Social reporting is an emerging role, a set of skills, and a philosophy around how to mix journalism, facilitation and social media to help people develop conversations and stories for collaboration.

While mainstream reporting is usually about capturing surprise, conflict, crisis, and entertainment, and in projecting or broadcasting stories to audiences, social reporters aim to work collaboratively with other people, producing words, pictures and movies together. They may challenge and even provoke, but social reporters are sensitive to the resources and parameters of the group, community or organisation they reporting for. They are insiders rather than outsiders.

An inspiration for social reporting from journalism has been to be bold in asking apparently simple or even stupid questions, on the basis that if you do not understand, others may not either. These questions are about trying to make sense of things for people who are not "in the room", and of communicating with them in ways they can understand. That means spotting "the stories" - the bits of a presentation or conversation that are worth telling to someone else.

The difference between social reporting and journalism lies in helping other people find meaning, create stories and to share them, rather than just being "the reporter" of stories. It is about using skills in story-telling to help the conversation along in ways that may help people work better together; treating everyone with respect; and ideally making it a fun and rewarding experience. It is more about conversation, collaboration and celebration than conflict, crisis and celebrity (although these should not be overlooked). It should - like the best journalism - be about promoting some transparency, accountability and openness, but not about thinking that only journalists can do that. It should be sociable, and for social benefit.

The difference between social reporting and more conventional ways of capturing the artifacts of an event is that the focus of conventional event reporting is usually about publishing the papers or power point presentations of main speakers, or the results and conclusions of discussions. In contrast, social reporting is concerned with capturing insights and informal content from participants, speakers and other unexpected places. The social reporter has an emergent reporting plan, which is both observant of the formal event programme and opportunistic in who to involve in the reporting process and where to publish.

As well as drawing on journalistic skills social reporters would also have some facilitation skills and a sensitivity to technology stewardship and social media. More recently we have begun to think of a social reporter as also being a "social artist" (see this blogpost: <http://socialreporter.com/?p=474>).

The *facilitation* element may draw on face-to-face methods like open space, where the facilitator aims to host a space within which people can choose what they want to talk about, mix freely, bring good ideas and possible actions to the surface. Social reporters might do that in the way that they create online spaces

where they and other emerging social reporters can public, mix and comment on text, audio, photos, video - enabled by the new social media applications.

*Social media* tools, and the philosophy they help promote, are what makes a different approach possible. Falling costs and ease of use mean people can create content online through mobile phones as well as computers. They can tag content so it can be mixed with the contributions of others. Interactions can take place in one or many places. Perhaps most importantly, the skills that people develop in doing this for fun, with their family and friends, can easily be transferred into social reporting. We don't need lessons in conversation, gossip, or "what do you think about this". Social media extends our conversational reach, stewarding technology for the benefit of the event.

However, social media tools are not the only ones to use. The tools you have in your hand are the right tools to use, whether they are pen and paper, a mobile telephone or a video camera.

Bev, David and Josien set themselves up in a space in the middle of the huge hall. To their right is Auditorium 1, with Auditorium II on the other side and Auditorium III far off to the left. They can see people milling round the Living Labs and Consultancy Clinics, although they are tucked enough away not to be disturbed by the main flow of people moving between places. They have some flipchart paper up on the wall at their desk, where they jot down the names and times of people they don't want to miss. They mostly keep to this plan. Other people they meet after sessions or in the Labs and Clinics, sometimes inviting someone to record a brief interview or to invite someone to record them self or another person. Occasionally you see all three of them at the desk focused on their computer, but it's more usual to catch sight of one or two of them uploading and captioning at the desk, while the other is "out and about". The desk has become a "home base" to other people they know at the conference who pop in to chat or to leave their bag.

## The who, why, what, when, where and how of social reporting

Journalists are taught that any story should cover the who, why, what, when, where, how of any situation.

Social reporting aims to do the same:

- **Who?** Social reporting has to meet the needs of event organisers, participants, and those not physically present. The social reporter should consider not just "what can I tell them" but also "how can I help them contribute".
- **Why?** The purpose of an event will create the context for social reporting. Is it to present information, showcase ideas and projects, enable interactive learning, or to build networks? Each of these different purposes requires a different approach from the social reporter.
- **What?** Is the main "content" of the event going to be static: papers and presentations? Just "putting things up" online is not reporting. It is a useful backcloth - but the real reporting comes from talking to speakers and participants and promoting those conversations online.
- **When?** Social reporting can start before an event, with interviews and other content, and support for social networking. It can continue afterwards through posting materials, and facilitating continuing discussion.

- **Where?** Social media enables people not physically present to participate in an event through video streaming, blog commenting, Twitter and other tools. The role of the social reporter is to create the event online - and then help everyone participate.
- **How?** Just how to do social reporting depends on the who, why, what, when and where. The style and tools will depend very much on the context provided by the event, and the expectations of organisers and participants.

Social reporting at the EQUAL event was part of the philosophy of mainstreaming social innovation. The organisers contracted a company to record the main speakers while the social reporters captured some of the insights from event participants, including some speakers. This particular event was for showcasing the work of EQUAL and ESF from the previous funding programmes so the social reporters focused on brief interviews with participants and speakers. They carried out some interviews with the event organiser and key speakers weeks before the event and published them on the blog. They interview speakers and conference participants during the event, uploading most interviews to YouTube and publishing these in the same blog. Their main publishing tools during the event are a Wordpress blog<sup>1</sup>, YouTube<sup>2</sup> and Twitter<sup>3</sup>, each person responsible for uploading, captioning and publishing their own interviews. Their main outlet was the blog (<http://blog.poweringanewfuture.org>) which was separate but linked to the main event website (<http://poweringanewfuture.org>).

## Planning

In planning to do social reporting for an event, you need to start by thinking about the purpose and nature of the event, who is going to be involved, and what approach to take. Only later do you need to start thinking about the specific tools to use. These issues are dealt with below, and there is a planning checklist in **Annex 1**.

### The purpose

What are you trying to achieve? For example, is it:

- a record of the event for later?
- simultaneous online content for people who can't attend?
- better conversations and more buzz for those attending?
- a mix?

Here are some of the things we have considered in relation to the recording the event:

- If the purpose of your social reporting is to be a record, you need to think about how to cover different aspects of the event. There may not be much point in doing a long video of a presentation where the speaker is essentially reading from Powerpoint slides and has extensive

<sup>1</sup> <http://wordpress.com>

<sup>2</sup> <http://youtube.com>

<sup>3</sup> <http://twitter.com>

notes. Just publish slides on Slideshare<sup>4</sup> and papers on Scribd<sup>5</sup> and embed them in your site. Then do a short interview with the presenter asking for a recap of the essential points of the presentation.

- Group discussions may be lost if you don't capture them, but people will probably not view pages of notes or chat. You can ask group members or facilitators to recap or tell you the highlight of the discussion, take photos of flip charts, or publish notes.
- For people who are not physically present: If you are reporting for people not at the event it may be worth webcasting presentations, and using mobile phones to do some instant video streaming using tools like Qik<sup>6</sup>.
- For conversations: If you want to encourage better conversations, then trying asking participants to interview each others, using really simple cameras like a Flip ultra or Mino (<http://www.theflip.com>). They may end up having more thoughtful question and answer sessions and a lot of fun, feeling they "have permission" - and so more confidence - to approach people they might not otherwise talk to.

Whatever you do, explain to people beforehand what you are trying to achieve, and emphasise that they should feel able to say if they wish to be photographed or video-d.

### **The context**

Researching the context of the event, and the expectations of different stakeholders at the event is crucial. Consider what has already published online, what has been discussed, and how well people know each other. This will all make a big difference to how you approach social reporting, and how people will react to the idea. The attitude of the event organisers and any facilitators is crucial. Talk to them first and get permission for any informal video or audio and share your plans with them, if social reporting is an integral part of the programme.

The timing and programming of the event is also important. For example, if it is mainly a formal occasion with presentations, it may be difficult to capture conversations except during breaks, which are likely to be busy and noisy.

### **The people**

Research who is going to be at the event, both speakers and other participants. If there's a social network - like Crowdvine<sup>7</sup> - use that to get in touch with people.

Think also about who you are reporting for. What do you think they are interested in? What opportunity are you going to give them to participate? For example, if you stream webcasts through something like Mogulus<sup>8</sup> there is scope for simultaneous chat. You can encourage commenting on blog posts after the event.

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4 <http://slideshare.com>

5 <http://scribd.com>

6 <http://qik.com>

7 <http://crowdvine.com>

8 <http://mogulus.com>

## Your approach: how open, interactive?

At one extreme you can broadcast: publish content in various forms, but not allow any commenting, or anyone else to contribute content. At the other end of the spectrum you can encourage participants to produce their own content and mix it in with anything you are doing, and also encourage anyone not at the event to comment and otherwise contribute as well. The way you go may be determined by your purpose, the other people involved, and the event organisers. You also need to consider that an interactive approach is less predictable than a broadcasting one and you will have less time to spend on polishing a finished product as you engage in the process. This needs to be clear to your sponsor.

## Tools for capture

Consider what sort of camera and/or recorder, microphone, mobile phone, monopod or tripod, and the tapes or memory cards to go with them. Will you need a laptop to download content as you go, and maybe upload on the day?

## Tools for publication and interaction

How are you going to get content online? You will probably need a blog or wiki, unless your site offers those facilities. How close do you want the social reporting to be linked to the main event? Is it an integral part of the formal event to feature on their website, or do you want to create a space between the formal and informal reporting? On the practical side you may need to upload to third-party/intermediate sites where you can store and publish audio, video, pictures and then embed or link to your site. You will probably also need to edit content, unless you are streaming directly

## Organising content

If you have content coming from different places and different people you'll need to identify it with tags so that you can aggregate into one place. For example you might set up a Twitter account <http://twitter.com/ourevent08> and then use ourevent09 to tag photos and videos uploaded to YouTube or other sites. You may set up special account for the event on video and audio-hosting sites. If you use the same tag throughout it is much easier to ask people to use it.

# Setting up systems for the event

Here is a some steps that can help you work through the process of getting ready for social reporting at an event. Try and do as much as possible before you arrive at the venue, getting access to the venue before the event takes place.

1. **Planning:** work through the planning issues with the social reporting team and the event organisers, agreeing the purpose, the people you are trying to engage with, the content, and the tools.

2. **Roles:** consider the reporter roles in your overall scheme. Who is going to do what? What mix of beginner, intermediate and advanced social reporting skills will you need? How will you bring them together? (More on social reporting roles on page 14).
3. **Online systems:** before the event, consider what online tools you may need and how they interact with each other. Also think through the equipment, for example cameras and a wifi system. How well do they connect with each other? Do these need to be integrated with any audio-visual systems that are on site?
4. **Access to internet.** Make sure your Internet connectivity is adequate. How fast/slow is the upload bandwidth? Unless you have really good upload speeds it will be difficult to get videos online, especially if many people are uploading at once. What is your backup plan for internet? How independent can you be? For example, do you have a dongle (USB connection to 3g internet) or your own router?
5. **Testing.** Set up online systems and test them.
6. **Pre-interviews.** Develop a plan to engage with speakers and participants in order to arrange pre-interviews, and encourage people to post on the social network if you have one. If participants are unfamiliar with social media, they are likely to need some encouragement.
7. **Social reporting team briefings.** Organise a briefing for social reporters in advance of the event, as a Skype conference and/or before the event. Organise check-in times during the day when you can come together and respond together to changes in programmes, expectations or plans.
8. **Upload what you can before the event.** Upload any presentations, paper or notes before the event, even if you don't make them live until the day. The more you have done previously the more free you are to focus on people and their conversations during the event itself.

David and Bev worked for three months in preparation for the event, including the social reporting of a previous event for ESF. One week before the event Bev was contacted by the organisers to see how the the main speakers' offerings were going to be harvested. In an email, she reiterated the following:

"The way I see it is that there are two different jobs to do as far as the reporting for the event goes:

1. One is the work that David Wilcox and I started in September, which is social reporting on behalf of the Innovation Mainstreaming CoP. Our job in that is capturing nuggets and gems in the conversations and stories of participants (and maybe speakers). This will be captured and embedded on the informal conference blog...
2. The other is the task of capturing the event more formally and for a wider audience...This is a much bigger job than the first one and needs careful consideration and planning. What do you want to capture and for whom covers a huge set of sub-questions..."

On the day of the event the social reporters worked in the same space as the official event reporters. While the official event reporters had huge amounts of equipment the social reporters had a simple Canon digital IXUS i zoom, and a Sanyo camcorder with monopod. They used videoboo<sup>9</sup> and uploaded videos to YouTube. The upload bandwidth was sometimes very slow and also dropped occasionally. Bev and Josien

<sup>9</sup> <http://bestbefore.tv/wordpress/2008/07/videoboo/>

had a dongle, and David had bought his Mac Airport Express so they were not completely dependent on the Ethernet connection provided by the organisers, nor the event WIFI, whose password was twenty-four digits and didn't seem to work. They arrived at 8 a.m., 90 minutes before the start of the event, and just managed to get things set up on time.

Bev had done two Skype interviews for the blog before the event and started her interviews by looking for Bunker Rory who she had contacted previously but never interviewed. Between them they named particular people from different sessions during the first day of the event, put these names on the flip chart above their desk, and made sure that they covered a range of different types of sessions and people. They went through this list about twice a day (first and last thing) changing the plan if it looked like someone was unavailable to talk, or if other opportunities arose.

They decided that they would each be responsible for their own uploading and captioning of videos and for the text in the blog. They were all experienced in the different tools and it was easier and more satisfying to "stay in the flow" if you did a task from beginning to end rather than split it up. It was sometimes frustrating as you waited for a video to upload, but it also meant that there were no bottlenecks as there sometimes is when one person is responsible for all the uploading.

## Tips

- Leave enough time to plan and set up systems ... ideally three months for a big event.
- Decide if one person will have responsibility for "editorial" management of content throughout the preparation, the event, and follow through or if each person will do their own editing.
- One person needs to be part of the event design team, or to work very closely with them. They need to be familiar with the topics and content to be covered.
- Organise technical support. The "editor" will need this for setting up and running systems, unless they have these skills.
- Ensure that you have administrative-level control of the online systems that you use - rather than having to constantly ask for changes or upgrade. A conventional event website is very unlikely to offer the social reporting functions you need, and a technical team running it may not be able easily to add those. Be prepared to set up a separate blog or wiki linked to the main site.
- In any social networking, lead by example. Get the organising team online "modeling" the type of interactions that you hope to see. Then try and get speakers to contribute.
- Work closely with someone who has insider knowledge of the event organisers and participants.

## On the day

The nature of social reporting on the day will depend very much on the type of plan that you have for the nature of the event. In particular, the approach to take to social reporting is likely to be determined very much by the context provided by the event. Components may be:

- Formal speeches, perhaps with Powerpoint presentations. The notes and presentations can be uploaded, and the occasion webcast simultaneously or video-d for later upload. There is not much scope for interaction - except that these days people may have laptops and/or phones through which they can comment via Twitter. However, you can do an interview with the speaker before and/or after to capture the essence of what they said.
- Panel discussion. Again, not much scope for creative reporting at the time - although it may be possible to get some interviews afterwards with speakers and also other participants.
- Round table discussions. It is difficult to capture useful discussions on the spot, although if the discussion is fairly informal you may be able to ask people to summarise at some point, or do a small presentation. You may be able to give any facilitators a simple camera to do that.
- Galleries. Some of the best opportunities for social reporting can occur if people have posted flip charts, post-it notes or other material around the walls. You can then ask people to gather round and discuss.
- Open space, self-organising groups. These may offer opportunities for interviews, or inviting a couple of people to contribute.
- Informal networking sessions offer opportunities, though you may find noise levels a problem

The above points focus on the role of the reporter as someone who intervenes with a camera or other equipment. However, some of the best content will come from participants who are contributing via Twitter or live blogging, or take up a camera to do their own interviewing.

Here is how social reporting may work in different contexts:

### **Formal event**

For example, mainly presentations, with some breakout rooms and panel discussions. The emphasis is on providing information from the platform.

- Papers and presentations online.
- Possible webcasting live of the presentations
- Minimum need for connectivity
- Social network is an option beforehand.
- Pre-event blog could include interviews with speakers and other news
- Some informal interviews on the day, uploaded later

### **Mixed formal and informal event**

There may be some of the formal elements above, together with more scope for reporting from round table discussions, galleries or networking. Organisers and participants may be more receptive to mixing in some reporting, and encouraging participants to contribute. Think about points above plus:

- More emphasis on social networking

- Use of Twitter
- Possible display of content on screens

### **Creative facilitated event**

Where there is a lot of interaction designed into the event it will be important to work closely with the event designer/facilitator to make sure that any reporting helps rather than hinders activity.

### **Unconferences and other self-organising events**

In the social media field there are lots of semi-planned meetups where the schedule for the event is a mix of pre-planned slots and others decided on the day. In these circumstances organisers and participants are generally open to any social reporting. The challenge is often finding quiet enough space.

During the day, they focused on connecting with people during the event and carrying out short video-d interviews. However, they did take detailed notes and a video of one of the main presentations in the auditorium, as they felt it was a significant one. Beverly also recorded an invited speaker at one of the side-sessions. The speaker was a prisoner who had come to tell her story so Bev had to check first with the Prison Director, the event organiser and the prisoner that it was OK to record and store the recording on YouTube and the blog. David was adept at making people feel comfortable in a conversation and turning it into a recorded interview. Josien was good at covering interviews with lots of different types of people and in different languages.

All three used Twitter. Photographs uploaded to Flickr appeared on the blog through the conference tag. They didn't use the flickr badge, but used the flickrRSS plugin<sup>10</sup> for Wordpress which creates a better-looking layout of the flickr photos. They had also added the plugin Embedit<sup>11</sup>, for easier embedding of YouTube videos, but forgot to use it on the day.

A very helpful tool for compressing videos was MPEG streamclip<sup>12</sup>. They were able to drag and drop video files and do some quick and easy editing like cutting the front and end of videos. This made the business of uploading videos much quicker. It also makes it easier for people to download the videos to watch.

## **After the event**

Work needed after the event depends on how things were organised beforehand, and captured on the day. A lot of content can come from participants, as this summary of blog posts after 2gether08 shows (<http://open2gether.com/>). If you have recruited people from the group or organisation to help with the social

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<sup>10</sup> <http://eightface.com/wordpress/flickrRSS/>

<sup>11</sup> <http://www.matteoionescu.com/wordpress/embed-html/>

<sup>12</sup> <http://www.squared5.com/>

reporting, you may have a lot of post-production work to do. This happened, for example, at the Anim@Te event: <http://animate08.wordpress.com/>

In a showcase event, such as the EQUAL event, the content came from the social reporters.

Work may include:

- Uploading presentations and papers
- Tagging and uploading photos
- Editing, compressing and uploading video
- Archiving webcasts
- Writing summary blog posts
- Organising content on a blog or wiki

Experience of previous events was that post-production work after an event was immensely time-consuming, sometimes taking days, and Bev was determined that they should finish everything before they all left for home. She organised that they could stay in the hotel for an extra night in order to give the social reporters more time to finish up. She knew how easily it is to forget things once you've left the event and got back into your daily work flow. They were more successful than on previous occasions in doing this, even if they were the last to leave the building, with the workmen clearing up and closing down around them after everyone had left. They were tired but also determined, together, to get it "done". They were pleased that there was only one video interview outstanding by the end of the event, although one speaker also sent a Powerpoint presentation to add to the blog a few days later.

## Reporter roles

At one level social reporting can be really simple - shooting a bit of video on a simple camera or phone, summarising a discussion, captioning a picture to promote some discussion. You do not even have to get it on the web if you are working with others who have those skills.

At the other end of the spectrum you may be helping an event organiser design-in the use of social media, setting up a news desk, recruiting and briefing other reporters, and then using a range of tools and skills yourself.

Here are some of the different roles that we have observed in social reporting an event, with a more detailed discussion of the levels of skill and experience needed.

### Different roles at an event

**Event organiser and facilitators:** probably not social reporter roles. Someone will be responsible - hopefully - for the overall orchestration of the event: not just the logistics of getting people into rooms, providing refreshments etc, but also ensuring presentations, discussions and everything else contributes to achieving the overall purpose. There may well be facilitators and hosts for sessions and networking. These

are the organisational "clients" for the reporters. The reporters will also, of course, be thinking about event participants and others not in the room, but they do need to work within the framework of the organisers if they aim to contribute to the agreed purpose of the event.

**Production team:** at a big event there may be a team providing audio-video support, including streaming content from one room to another, or on to the web. If you can plan with them and the organisers, it may be possible to integrate their production with social reporting content. For example, see: How Richard Jolly provided webcasts at 2gether08.

**Strategist, planner, director, mentor:** taking an overview of what is to be achieved and working out with the event organisers how to integrate online and face-to-face. Involves advanced skills. May mentor someone in the event organisation to take on the social reporting.

**Editor:** someone who takes responsibility for what appears before, on and after the event on any site that is the responsibility of the event organisers. Needs advanced skills - or maybe intermediate if paired with an advanced reporter. It is not possible - or usually desirable - to try and control what participants put up online on their own sites or places like YouTube and Flickr. You may quite properly ask event participants not to video some presentations, and to ask others in discussion groups if they are happy to be filmed. But you cannot stop people using phones to post to Twitter on the day, or on their blog afterwards. You can make it easier to organise content by agreeing tags that are used with content and then pull things together from different places.

**Newsdesk technical support:** while the editor will be focused on content, they may also need support in managing video and image files generated by reporters, compressing and uploading material, making sure content is appropriately tagged. Needs intermediate or advanced technical skills, depending how well organised the systems are beforehand.

**Reporters:** beginners and intermediate reporters can generate video, audio, photo, text content provided there is a well-planned framework, editor and newsdesk support.

**Participants:** people attending the event may well be able to contribute great photos, videos, blog posts and Twitter tweets without being "social reporters". To make the best of this, firstly explain to people what you aim to do through social reporting, and say that anyone may request they are not video-d or photographed. You should also explain what the policy is on quoting. Is it assumed that it is OK to attribute all content, or are their Chatham House Rules that restrict this? Then let people know what tags you are using, and whether there are any sites to which people can contribute directly.

On a previous social reporting job for ESF that Bev and David had carried out, Beverly focused almost entirely during the day on facilitating the event, while David worked on the Newsdesk, editing and uploading videos. They had a team of participants who took on the role of social reporters, mostly recruited on the day, with a nucleus of people who had been involved earlier. Bev and Josien had also worked on an EQUAL social reporting job, where a core group had met face-to-face for training in social reporting and some of the tools. In that event they had both been on the newsdesk (there was no facilitation element) and used the

footage provided by the volunteer social reporters. At this current event they each take on the role of social reporter and newsdesk, rather than dividing the roles between them. Beverly had more of a context-providing role, David more of a technical role, and Josien on the content.

## Ongoing reflections

Even though you are likely to be really busy at an event it is worth pausing to reflect on what has worked and what has not. Here are some of the main reflections we have made during EQUAL events, each reflection informing the next social reporting task. What works in one context does not automatically work in another (and vice versa):

- Do not embed a social reporting page too deep into a site. See, for example, the social reporting at this event “Carrying innovation forward in the ESF” (<http://innovation.esflive.eu/node/644>) where it takes a reader too many clicks to reach the pictures and stories. Ideally everything should have gone on a front page.
- Ideally the social reporting would be integrated into the event webpage with all participants happy with the conversational style and informal comments being published. However, if the organisation or event is rather formal, social reporting will not work on the official page. Try to create another site (a blog or a wiki) for the social reporting, which is linked to the official site, but not dependent on it or the official site administrator.
- Social reporting for community building can be very rewarding. However, including many people in the process of interviews or filming can lead to a lot of downloading, uploading, editing, captioning and other post-production work for you. Budget for this time, otherwise you will spend days and weekends doing quite unrewarding and invisible work.
- Wherever you can, work as a team. We found that having a team of three “advanced” social reporters, with as many other volunteers, was ideal. It is also worth paying attention to the process of working together. It is so much more fun and certainly more effective.
- It is very helpful, even essential, to have someone in the social reporting team who knows the people and context of the event.
- Having a strategic space at the venue for the newsdesk and social reporting team is important. Ideally, you should be somewhere that is both visible and with some privacy. Passers-by should feel comfortable to approach you, but also see that you are working. Try and organise someone to keep you with water and refreshments. It really helps you to stay in “the flow”.
- Have different methods for everything. Have different styles of interviews, different types of recording, different ways of connecting to the Internet. Each method brings a different type of interview and gets people talking in different ways.
- Try to “finish up” as you go along. In other words, upload videos, write the captions and text, embed and publish it all, before you move on to the next interview or report. This is easier if there are three of you and more difficult if there is one.
- Find a balance between task-lists and being opportunistic. The times when a task list (who will interview who, from which session, at what time) is most important first thing in the morning and later as you start feeling tired and losing concentration.

- Do not rely on photos or videos. Make sure you have text with each one. Some people do not bother to watch video; for some people videos take a long time. Good text is important.

On the first of a three day event Bev, David and Josien were working right up to the moment the coach arrived to take everyone to the event dinner. This didn't leave time for any reflection on the first day. Bev and David were staying in the hotel and met up for breakfast the next morning, so they had time to talk a bit about the previous day. On the second day they took along some flip chart paper to the venue, stuck it on the wall, and made sure they had time to brainstorm what was working and what wasn't. It was really helpful.

They recorded some of that conversation here: [http://www.youtube.com/watch?v=8avc6FaZ4sY&feature=channel\\_page](http://www.youtube.com/watch?v=8avc6FaZ4sY&feature=channel_page).

On the third day they continued working until the very last moment. The venue was being dismantled around them, which didn't give much time for reflection. But the previous day's conversation had been quite comprehensive and they felt that they could email each other with further thoughts that arose.

## Further reading and resources

<http://srtoolbox.wikispaces.com/>

this is the wiki (editable website) we are using to document our findings and learning around social reporting.

<http://animatesr.wikispaces.com>

Here you find some information in Portuguese

<http://socialreporter.com>

David Wilcox' blog. He regularly publishes videos and writes about social reporting.

<http://www.eudaimonia.pt/btsite/content/view/115/32/>

A blogpost by Beverly Trayner that sums up the purpose for social reporting in some bullet points.

[http://partnerships.typepad.com/civic/2006/10/social\\_media\\_so.html](http://partnerships.typepad.com/civic/2006/10/social_media_so.html)

This is when David Wilcox first wrote about social reporting.

<http://socialreporter.com/?p=40>

David Wilcox writes how the idea further developed.

<http://onlinefacilitation.wikispaces.com/Practices+for+Capturing+and+Sharing+Conference+Stuff>

In Nancy White's excellent online facilitation wiki there is lots of stuff about the use of social media during conferences for capturing.

## Annex 1: Planning checklist

This is a checklist for planning social reporting at an event, to be read in conjunction with Planning reporting

Why are you planning to do some social reporting?

- \* Capture the content as an archive?
- \* Show content to people who could not attend?
- \* Improve conversations among participants?
- \* Promote future events?

Who is the social reporting for?

- \* The organisers, as a record?
- \* An outside audience?
- \* People attending the event?

What sort of content?

- \* Papers and presentations?
- \* Interviews with speakers before the event?
- \* Interviews at the event?
- \* Facilitated discussion records?
- \* Informal conversations?
- \* Integrated with other content - e.g. flip charts and other content from discussions?

What restrictions, encouragement?

- \* Only registered participants able to access some or all content?
- \* Encourage non-registered people to join in?
- \* Restrictions on photos, video by participants?
- \* Encouragement to live blog, Twitter?

Where will content be available?

- \* Online at main site(s) - and/or promoted and encouraged elsewhere?
- \* At the event - screens as well as online, integrated with other media (flip charts etc?)

How will content be captured and organised?

- \* Audio, video, text?
- \* By trained social reporters, volunteers, and/or participants?
- \* Organised on the day or assembled afterwards?

When will content be available?

- \* Before the event? Just by organisers, and/or participants by invitation?
- \* At the event? E.g. by screens, online, on the walls?
- \* Outside the event, simultaneously? By blogging, Twitter, webcasting?
- \* After the event? E.g. papers and presentations, webcast archive, informal content?

How will you engage audiences/participants

- \* Outside: e.g. mailings, Twitter, blogging?
- \* Participants: e.g. at registration, afterwards

## Annex 2: Further examples and insights

There are examples here, including the following

The Innovation Exchange wanted to promote their call for project ideas - so they organised video coverage of their Festival of Ideas days, with a mix of capture of presentations, discussions and informal conversations. This was available publicly on wikis and on their blog.

<http://inex.wikispaces.com/>

<http://inex2.wikispaces.com/>

<http://innovation-exchange.org/festivals-of-ideas>

Later the Exchange ran an event for projects they were funding, in order to capture baseline content. All video will be private to the Exchange and participants. However, by giving cameras to the facilitators, participants were encouraged to be particularly thoughtful in feeding back from their discussions.

Giving cameras to facilitators <http://socialreporter.com/?p=440>

The 2gether08 Festival used a wide range of tools before, at and after the event for those attending and other who couldn't. Participants and others were encouraged to contribute through a social networking site, and Twitter.

How tools were used for 2gether08 <http://socialreporter.com/?p=132>

Digital Unite supports older people in their use of communication technologies. They used the occasion of their Silver Surfer Awards day to set up a blog, and then encourage people on the day to create their own videos. This produced a lot of content on the day, a buzz of conversations - and plenty of continuing discussion.

How Digital Unite used some social reporting to animate and record their event

<http://socialreporter.com/?p=431>

Tim Davies reflects on the difference between reporting at events, and helping people report for themselves.

<http://www.timdavies.org.uk/2008/10/15/reflecting-on-social-reporting-or-enabling-social-reporters/>

Different approaches are needed for "stuff, stories and conversations" as described here

<http://socialreporter.com/?p=61>

## Annex 3: a one page brief for social reporters

### Powering a New Future, Lisbon 2008

#### Social Reporters - some pointers

##### Introduction

A social reporter's mission is to capture some of the insights and stories that you probably wouldn't hear in a formal account of the event and to put those insights and stories online. We work as a team, using low-cost tools that can easily be adapted and used by other groups. Our approach is positive, conversational and looking for ways to mirror the stories and learning from people at the event.

More information in English about social reporting can be found here: <http://srtoolbox.wikispaces.com/> And here in Portuguese <http://animatesr.wikispaces.com/>

##### Tools

The kinds of tools we'll be using today are:

- Pen and paper
- Camera for photographs
- Video camera

These stories and insights will appear in these locations:

- Event blog: <http://blog.poweringanewfuture.org>
- YouTube: <http://youtube/user/panf08>
- Qik: <http://qik.com/event/1141/powering-a-new-future>
- Flickr tag: <http://flickr.com/panf08>
- Twitter tag: **panf08**

##### Conversational questioning

To speakers

- you have been talking about ... please preview/recap your main points
- what advice would you give on ...
- I heard you say ... can you explain a little more

To participants

- what have you heard today that inspires you?
- is there anything you've heard or seen today that has surprised you?
- I saw you at the session on <X> and wondered if it resonates with your own experience?

### **After recording**

- Check the person's name (and correct spelling). Where do they come from (they might want to be identified with a country, an organisation, or to have no affiliation).
- Make some notes to help you think of the caption (for the blogpost or video).
- Either upload your video, photos or text onto one of the online spaces or report back to the newsdesk.

### **Thanks**

**And let us know how it went and how you go on to use social reporting in other situations.**