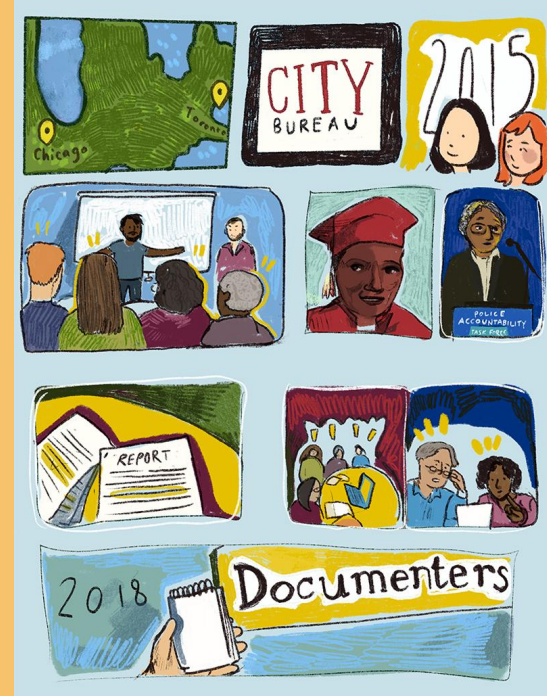


How to start a Documenters Canada site within your local news organization



Step #1: Let's start with some pre-reading

- Have you taken a look at our resources available on our website?
- Take a look at some of the articles we've written that describe our philosophy.
- Wondering what our notes look like? Here's our note-taking template and here are links to notes, videos, and newsletters published by Documenters at *The Green Line*.

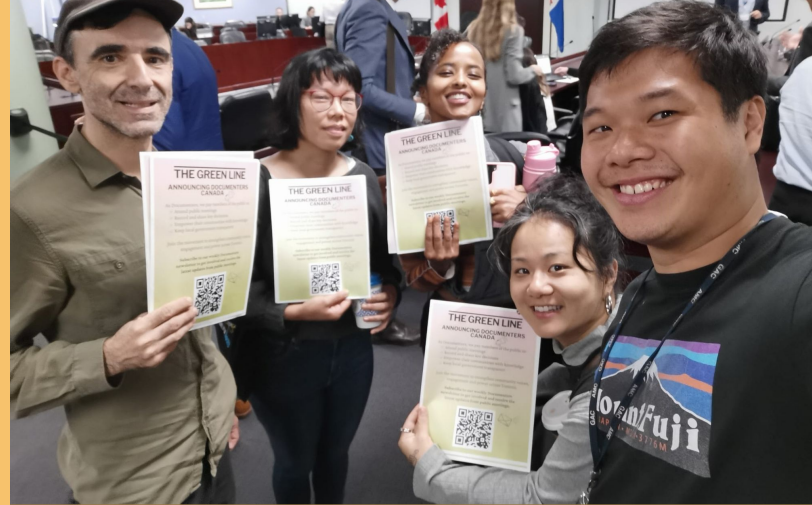


Step #2: Start with community links

- This ensures that you're aware of community needs and interests from the start
- It's important for your community to feel engaged from the beginning, even before you launch
- A few points to think about when getting started:
 - Are there community stakeholders you want to connect with as you get started?
 - Community groups already in the space can help recruit, distribute notes, give direction, sort out community information needs, etc
 - Perhaps you'd like to set up an advisory board with some of these folks

Step #3: Know your Documenters and audience

- Getting to know both your Documenters and your audience is an important tool to successfully launching the project in your area.
- Ask yourself about their identities, their interests and their communication styles. Are they from a particular geographic or identity community? We suggest finding people with lived-experiences in the areas that will be documented.



Documenters from *The Green Line* in Toronto pose for a group photo.

Step #4: Who's designing your project and leading its vision?

- Our training materials and guides are available to you but you'll need to localize them
- Assign someone or some people the following tasks:
 - Developing a workflow for the project
 - Recruitment and training
 - Building links with other communities/groups who might be interested in using/publishing the notes and ensuring your work is meeting community needs
 - Maintaining an advisory board who can give feedback on direction
 - Offering supplementary training e.g., how Documenters can connect with their communities to understand their information gaps
 - Fundraising
 - Tracking impact
 - Being a contact point with the Documenters Canada network to share and learn

Step #5: Who's managing your product on your day-to-day?

- Is there someone at a local news org who can allocate some number of hours per week (10-15 likely)? How will that person get paid?
- We recommend someone who will do these tasks, at minimum:
 - Find and assign meetings
 - Conduct trainings
 - Manage Documenters
 - Edit and fact-check notes
 - Publish them in some predictable place e.g. the Documenters Canada website and the local news org site
 - Build a community of practice among the Documenters so they can learn from each other in order to ensure they're satisfied with their work and offer supplemental training where needed

Step #6: Some assembly required — time to construct the training program



- You're welcome to start with our [existing](#) field guide and training process and localize it to your context
- We're more than happy to hop on a call and chat with you to help create a detailed and engaging training program
- Take special care and time with this step because good documenting makes the lives of everyone much easier

Step # 7: Recruit your Documenters

- Here are a few ways you can find eager people to join your team:
 - Put out a call on social media
 - Use your existing connections
 - Send emails to your newsroom's subscribers/readers
 - Poster around your city
 - Try university/college campuses
 - Attend a couple meetings (such as BIA meetings and city hall meetings) and pitch the idea to citizens spectating/are there showing interest

Step #8: Conduct your trainings

- Now this will look different depending on your needs and styles but it would be good to include:
 - Fact-checking
 - How to find good meetings
 - Note-taking format
 - And other details found in our [Field Guide here](#)

Step #9: Start a distribution plan

- It's time to distribute the notes, how will you do it? Here are some guiding questions:
 - Will the notes be published on a sub-section of your local news site (this is ideal)
 - Will they be published on the Documenters Canada website?
 - Will they be shared out by other people/groups/social media accounts?
 - Build an initial list of connections early



Step #10: Have a plan to check-in on how it's going and revise as needed



- Good work takes tons of effort and it's important to keep track of progress and take feedback from everyone involved
- Try to create a timeline of when to re-visit the various parts of the project in order to make changes accordingly
- Remember, it's totally okay to switch things up and take educated risks

Tip: Stay in touch with the network to see how we can support each other

Always remember that we are here to support one another. What one city has done may benefit another in creating and maintaining a successful Documenters project in their area. We are one big team with a shared goal: to make information accessible.

