

Keeping a Record of Your Activities & Tasks

I. Why You Should Keep a Record

Very few people come into this world equipped with a photographic memory that records perfectly the names of people, phone numbers, government departments, summaries of laws, policies, etc.

Yet as an active citizen working on issues you will frequently be in the position of needing to recall the exact date of an important conversation, the name and phone number of a useful contact mentioned by another persons, or suggestions made in meetings. What's more, often you will have to recall such information weeks or even months after it occurs.

Keeping a record of your activities, plans and tasks is essential to ensuring you can recall key facts, numbers, contacts, dates etc.

The question becomes, what kind of record, and what system should you use to record important information clearly and accurately without getting bogged down. A record should be no more than a tool to achieve other ends, not an end in itself. The goal is to keep a brief record of the important information you may need later so that your energies can be channeled into doing project work.

II. How to Keep a Good Record

The following are helpful hints for keeping a good record:

- 1. You should keep a different record book for each project or campaign**, and the record books you use should be different from a daily calendar that you use to keep day-to-day appointments. This will help you keep your records and separate tasks for separate projects organized, and your day-to-day life organized also.
- 2. The record book should be large, but not too large.** Large enough so that you are not running out of pages often, but it should not be so large that it is a burden to carry around. Of course, you can also use one of computerized record books now available as they are small enough to carry with you.
- 3. Record only essential information.** Record what you will likely need to recall later, but not so much that you are spending unnecessary amounts of time in your record keeping. **In most projects, the vital information includes:**
 - (a) Day, date, time, person, number, summary of conversation of all phone calls.** Special care should be made to get the correct spelling of



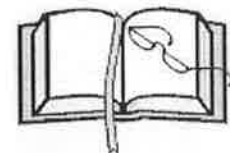
the person's name (it is often easy to do this at the beginning of a conversation; in some cases, just asking about the spelling shows that you are serious and that you consider the person an important contact). If it is convenient and if there is a chance you'll need to get back to the person, take down the person's address and phone #.

(b) Summaries of contacts with experts, public officials, administrators, etc. Usually you can make notes during such meetings. Occasionally, you can't (e.g. at a meeting with a politician giving you inside information who might feel more constrained and apt to censor or leave out information if s/he is talking in the presence of someone who is recording virtually everything being said). In such cases, you will want to pay close attention during the meeting, to the point of repeating important names in your mind or using memory tricks so you don't forget, and then making a summary of the conversation afterwards. Many people find that just making the summary later helps over a period of months to increase your ability to pick out and remember important items.

(c) Summaries of project meetings can also be recorded in your log, making it a one-stop summary of what is happening in your project. The key to note-taking is to stick to key new information, summaries of important information from project members working on other parts of the issue than you are, specific dates, events coming up, contacts, assignments, etc. It is a valuable skill to develop to be able to record the key information of a meeting as it progresses without hindering your ability to participate. Most people find that taking notes actually helps them participate by pushing you to think, structure and prioritize material.

4. Put a box beside every task that you have to do and a Δ beside every task someone else is doing. If you do this, when you look at each page in your record book your list of things to do, and for others, will be very clear. As you or others do each task, put a \checkmark in the or Δ and note the date the task was done beside it.

5. Go through your log regularly (e.g. once each week) to make sure you did everything you wanted to or agreed to do. Also, reviewing meeting, phone and contact summaries might suggest new ideas to you.



6. Review your record book for key information occasionally. As your record book fills up, it's a good idea to go through and underline key names and/or circle key topics with a red pencil for quick reference in the future.