

Consultation practices

Living memories and intangible heritage: documenting oral tradition

LExpertise and knowledge have been passed down over time through memory, oral tradition. Still today, some of our Elders recall memories when they see archaeological objects, stories that were told to them by their grandparents, like my mother-in-law who was born in the 1920s. She learned a lot from her grandmother¹.

Claude Kistabish, Anishinabe (Algonquin)

This section proposes an approach, methodologies for consultation and collection, and tools for discovering and collecting a wealth of oral tradition while grasping cultural particularities that are intangible. Spoken words, human interest stories, and ways of being, thinking, and acting make up a large part of our cultural heritage. However, comparable to an iceberg, knowledge from oral tradition and intangible heritage is not readily apparent and therefore difficult to access without a focused interest.

A holistic and human approach to collection

The proposed approach is based on the importance of **collecting different perspectives** of a shared history or shared cultural heritage. It is called a holistic approach because it addresses an entire, rather than treating each component of that topic individually. The **diverse views** allow various realities of the same context to be revealed and thus transmit a nuanced and respectful vision of the topic. Hence, we propose various methodologies of collection and consultation that are complementary and can be adapted to the context of each research project. According to the objectives set, various combinations of collection methods may be chosen.

¹ KAINE, Élisabeth, Jean TANGUAY and Jacques KURTNESS (2016). Voix, visages, paysages : les Premiers Peuples et le XXI^e siècle, Quebec, Presses de l'Université Laval, p. 3.

Consultation approach

Encourage MEETINGS and participation; How to interact?

The consultation and collection of testimonies related to history and culture always remain a sensitive issue, especially when a people has been subjected to colonizing and racist actions for decades, even centuries. Every individual has experienced his or her own set of negative situations and is not equally open to sharing knowledge and insights. This makes it all the more important to be clear about the purpose of our research, even if we are working towards a community goal to be conducted in-house, by people sharing the same culture, the same community. The Founding principles section includes methods and tools from an ethical and moral standpoint.

On a relational level, here are some suggestions to encourage dialogue.

Build trust human relations:

- Clearly expressing **the intentions of the consultation and collection project**, demonstrating **absolute transparency** is key;
- **Respect commitments**, those established in the official forms but also those made verbally during meetings. If expectations are created, it is important to meet them;
- **Be attentive** to others, **without imposing a relationship** because **trust** is developed and established over time. The bond of trust is strengthened with time, through the gradually developed reputation of the project and its implementation;
- **Allow others to express their queries and concerns**, if need be. Suggest solutions and/or explain existing processes and precautions that address them.

Qualities and attitudes to foster:

- **Be authentic**, true to yourself and empathetic;
- **Be at ease**, because the worst obstacle is embarrassment! Humour, authenticity and humility are attitudes that foster good relationships;
- **Act in accordance with local customs**, it is important to show respect for the community and Nation that welcomes you;
- **Be positive**;
- **Be present-minded**, live the experience, be attentive and interact in a spontaneous and coherent manner regarding the comments of others;
- **Be open to what others are saying**, have kind intentions and be non-judgmental;
- **Accept silences**, allow others to develop their thoughts and give them time to do so. Once they state that they have nothing more to add, a few related questions may be asked.



Who to interact with? Who are the living memories?

Elders are certainly essential resources for the documentation of history. Through their experiences and memories, collective history is experienced. Other people may also hold a page of history. From one meeting to another, the list of people to meet frequently grows. This is a good sign! This is the basis of history emerging.

There is no particular profile for a living memory.

Age, gender as well as personal and professional experience may vary. This variety brings strength to the results of the consultation and collection, as it allows for various points of view of the same situation. It should be noted that people who are less often solicited, such as those who do not often speak on television, in the media, or in public, may present lesser-known aspects of a subject. Therefore, it is important to have a diversity of sources to allow for as many people as possible to be heard.



Recognize and promote expertise

Cultural and oral knowledge is a unique and valuable expertise of our nations. It is common for people holding such knowledge to underestimate the value and wealth of what they have to transmit. In this case, it is important to take the time to explain to them the reasons why we were referred to them and why they were chosen. By doing so, they may become aware of their importance.

Sharing culture and oral tradition is an expertise that also has a monetary value that must be acknowledged. Fees vary from one individual to another, from one community to another, from one sector to another. There is no standard. Therefore, we need to inquire about the participants' rates and the local rates. We can also establish a price list in accordance with the context, travel costs, etc.

Pour aller plus loin...

Références de compensation (en PDF)

À notre connaissance, il n'existe pas de charte normalisée disponible publiquement pour la compensation des expertises culturelles. Il est toutefois important de vérifier auprès du milieu dans lequel nous œuvrons afin de connaître les procédures.

<https://histoires-perspectives.com/wp-content/uploads/2021/07/Reference-de-compensation.pdf>

How to create a favourable context for meetings?

The location, tone and atmosphere of the meeting are important aspects that should not be overlooked, since they can influence both the foundation of trust and the comfort level of the participants. Planning informal occasions for gathering and sharing in a friendly manner, such as sharing a meal, is a great opportunity to get to know one another better. You can also bring your host a gift. For instance, if your host is an Elder, or engages in the practice of spirituality, a tobacco ring is a great way of showing your appreciation and offering thanks for their support.

Before conducting an interview, it is also suggested that the individual chose a location where they feel comfortable or a place where they will have things to present for historical support.



Methods and tools

Thematic analysis with a focus group

One of the first steps of a consultation is often the thematic analysis with a focus group. This activity helps identify various perspectives of the same topic and provides guidelines for further development.

Objectives

- To establish an overview of a situation.
- To obtain different points of view.
- To encourage exchanges and the complementarity of viewpoints.
- To generate topics and provide suggestions for further research.



Development process

PRIOR

1. Form a group of about 12 people.

Groups can be smaller or larger, depending on the context.

2. Define the profile of the participants.

Depending on the context and the objectives, it is important to define the profile of the participants.

It is generally preferable to form a group with individuals of various ages, genders, families and professional backgrounds.

3. Prepare questions.

It is a good idea to focus on a simple, general, open-ended question that can be broken down into sub-questions to address various perspectives or different publics. Here is a sample question:

Name elements of your history that you consider important, which need to be transmitted...

- to the youth in your community?
- to people in your community?
- to Allochthonous people?

DURING

1. Plan for someone to be the facilitator and someone else to take notes in real-time.

Suggested materials: table, digital recorders and paper, cards and pencils.

Note: The recorders are used to capture the meeting. The recordings obtained can be used to complete the notes, if necessary. However, participants should be advised, as some Elders may be reluctant to being recorded.

Procedure

1. Once the cards and pencils have been distributed, the facilitator asks the questions;
2. The facilitator gives the participants about 15 minutes to answer each question;
3. Participants take turns explaining their answers, this encourages discussion among the group;
4. Once the round table is concluded, participants share their cards and, collectively categorize their ideas according to the themes to be defined as a group (more precisely, combine what goes together and identify these groups).

SUBSEQUENTLY

1. Complete all notes, ensuring that all the statements have been transcribed correctly and consistently.
2. Return all notes to the participants so that their statements can be validated. They can elaborate on an idea or ask for certain statements to be removed.

Option 1

The activity can be performed using photographs or objects. Thus, instead of answering in writing, participants can choose photos or objects at their disposal.

Option 2

Questions may be asked beforehand, and participants may be asked to supply the necessary material for the meeting.

Discussion workshop regarding tangible heritage: archival photographs, objects, etc.

This workshop can be held among a community group, a family group or during individual interviews. Tangible heritage helps to revive memory. It encourages the expression of historical experience and facilitates exchanges and dialogue. Elders particularly like this type of activity.



Objectives

- To reveal human interest stories.
- To document and collect views on past events.
- To document a specific know-how, location or aspect.
- To select people and/or situations that had a historical impact.

Development process

PRIOR

1. Identify items of tangible heritage that are relevant to the intent of the research project.

This tangible heritage can come from different sources. Personal or family heirlooms or photographs may be used. Conducting research in community, provincial or museum archives may be useful. Many museums provide online access to their collections. Photographs of objects may be useful during the workshop.

Option 1

A meeting in the presence of objects from museum collections can be organized in partnership with a museum institution.

Option 2

Workshop participants may be asked to bring photographs, objects, or other elements of their tangible and cultural heritage that they wish to share.

DURING

1. Encourage spontaneous and open discussion.

Discussion flows freely. Spontaneous questions may be asked as they come up to ensure understanding and to further develop documentation.

2. Offer all participants the opportunity to speak.

The facilitator ensures that all participants of a group have the opportunity to speak. It is recommended to record or take notes on what is said during the meeting. Photographs or video footage may also be taken to capture what was said during the meeting.

SUBSEQUENTLY

1. Share all material stemming from the meeting.

It is important to provide participants with the transcripts, photographs and videos for their personal archives and for content validation. This will ensure the consistency of the archived material.

Note: During meetings, it is important to demonstrate understanding regarding the choice of language used. If participants are more comfortable speaking in their native language, the use of an interpreter is recommended, to facilitate dialogue when necessary.

Individual and group interviews

There are several ways of conducting individual and group interviews. For the proposed approach, the informal interview and the semi-structured interview are recommended since they enable the collection of content based on experience and nuanced narrative, the sensitivity and revelation of others.

Objectives

- To document knowledge, experiences, and ways of doing and being.
- To encourage conscientious and culturally meaningful documentation.



Development process

PRIOR

1. Determine the goals, objectives, intentions and key points to be addressed.

The key is not to have an answer for each item, but to clearly state the general objectives of what is being sought.

2. Present the meeting's objectives to the participants and jointly plan how the interview will proceed.

DURING

1. Prepare and set up the material.

Once time has been taken to set up and prepare the material, no further thought needs to dwell on the matter. It is important to check the proper functioning of the recording and to have a list of technical items to be verified, such as cleaning the lens. This approach helps in the heat of the moment.

2. Ask open-ended questions that invite discussion, exchanges and sharing.

During the interview, it is recommended to ask open-ended questions that invite descriptions and details to be disclosed. It is preferable to avoid questions that generate short, closed-ended answers (yes or no), such as questions that begin with "Would...".

3. Develop questions in such a way that participants will include these questions in their responses.

It may be useful to ask questions in such a way that participants include these questions in their responses. This approach makes it easier to use the recordings when producing a means for transmission and/or an educational agent.

Examples of questions : What should one know about this topic? What would you like to tell the youth?

4. Do not interrupt participants.

This is, of course, a matter of respect, but not interrupting participants also facilitates eventual dissemination.

SUBSEQUENTLY

1. Share all material stemming from interviews.

It is important to provide participants with transcripts, photographs and videos for their personal archives and for content validation. This will ensure the consistency of the archived material.

For further development...

Qualitative or quantitative, structured, semi-structured or informal interviews

There are various methods of conducting interviews. In the proposed approach, we favour **the qualitative interview which is conducted in a semi-structured manner**. It encourages the expression and development of thought. It enables further documentation of cultural and intangible nuances by identifying feelings, impressions and ways of thinking and acting.

The informal interview is another approach for collecting qualitative content. It is particularly used when demonstrating observable skills. In this situation, the interviewer is more of an observer, and the interviewee is encouraged to share knowledge and demonstrate what he or she desires.

In some circumstances, gathering **quantitative** content may be a necessary requirement of collection. Quantitative methods are mainly used to provide a statistical and representative portrait of certain characteristics of a theme. They involve asking specific questions that are not open to interpretation and to which the answers are very short (a single or a few words, a rating scale of 1 to 5, etc.). The interview is essentially directed and leaves little room for emotion. Quantitative collection is generally used to reach a large number of participants. Telephone or online surveys are most commonly used.

Practical online tool available to create surveys

This tool from Google helps develop forms which can be sent remotely to gather responses from selected individuals. It can also be used for other purposes, such as the creation of registration forms.

<https://docs.google.com/forms/>

Playful workshop with youth

The products for transmission and education developed from content of consultations are often addressed to young people, who are rarely involved in the consultation phase. Why not involve them during the research phase? Their interests and knowledge can certainly guide the collection process. Since it is not always easy to establish a dialogue with this age group, here are some ideas to make the meeting fun and enriching...



Objectives

- Listen to the opinion of young people regarding their historical and cultural interests.
- Guide the consultation and collection process towards topics of interest for young people.
- Determine the needs in terms of transmission and education.

Suggestions for activities

Game-quiz: To encourage dialogue and conversation among youth.

Young people can discuss together by asking questions from cards just like a quiz format. A camera can be made available to the youth to record the meeting. They should ask the selected questions in a style like a television interview.

Photovoice²

This activity must be carried out in two stages.

1. Young people are asked to take pictures of items (or people) they are curious about which come from their daily lives or culture. They should be given a few days to do this. Print or project the photographs taken and ask participants to present them.
2. Let the discussion flow freely and if needed, ask for clarification regarding the reasons or stories related to the photographs.

Note : Young people can also participate in the consultation. For instance, they may carry out activities of documentation and collection with their peers. See the section Intergenerational meetings.

² This method was developed by Caroline C. Wang, University of Michigan, and Mary Ann Burris.

Intergenerational meetings

Creating contexts for intergenerational meetings and exchanges is a very effective and culturally significant method of consultation and collection, especially when dissemination and transmission of this content is addressed to a young public.

Objectives

- To give young people the opportunity to seek information and document topics and elements that interest them.
- To give Elders the opportunity to transmit to young generations the information they consider important.
- To encourage cultural transmission between Elders and youth.
- To initiate an intergenerational dialogue.
- To value young people and encourage them to get involved in the transmission of their culture.



Development process

PRIOR

1. Raise awareness about the importance of documenting one's history and culture.
2. Give young people basic notions for collection and documentation. (see the section Documentation practices)
3. Discuss with the youth the topics and/or historical and cultural elements they would like to discuss with an Elder.
4. Support the youth in the preparation and organization of an intergenerational meeting: selection of an Elder, initiating contact, logistical, technical and material preparation, etc.

DURING

1. Be available remotely, if needed.

SUBSEQUENTLY

1. View or listen to the recordings with the youth and provide feedback for improvement, as needed.
2. Ensure that the data is archived and that copies are sent to the participants.

Note : The concept "intergenerational" should be interpreted in its broad sense. A parent-child meeting can be just as relevant as a meeting with an Elder.

Open-line

An open-line is generally addressed to the whole community. It allows for one or more questions to be discussed. It invites people of the community to express themselves on air. An open-line requires the collaboration of community radio.

Objectifs

- To acquire the outlook of the community regarding history or a certain topic.
- To provide research leads to document history or a certain topic.
- To rally a community on the subject of history or a common theme.



Development process

PRIOR

1. Promote the activity and clearly communicate the objectives.
2. Develop a well-defined question.
3. Provide an experienced facilitator to lead the discussions.
4. Provide someone who is familiar with the research topic to offer clarification, if needed.

DURING

1. Host the open-line, while ensuring the collection objective.
2. Record and/or take notes of the open-line and the contact information of participants.

SUBSEQUENTLY

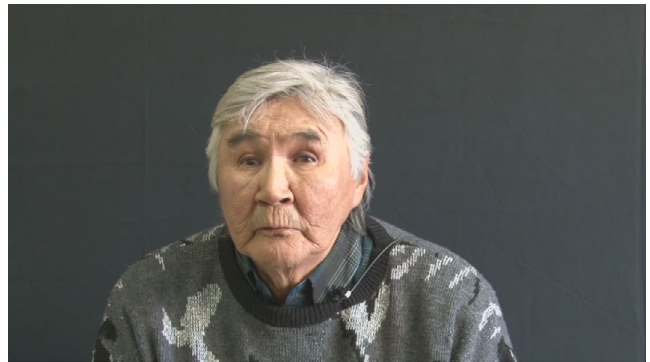
1. Consolidate the notes taken.
2. Follow up with participants in the event that more elaborate discussions may be needed for collection.

Vox pop

An interview can be intimidating, thus the proposed “vox pop” method allows participants to express themselves freely, without the pressure of someone watching them or being asked an unexpected question.

Objectives

- To encourage freedom of expression.
- To provide a comfortable, pressure-free context for expression.



Development process

PRIOR

1. Provide an adequate location (soundproof, without any people-traffic, with a background and some lighting, etc.) to set up a comfortable recording area.
2. Prepare a question or a few questions for people to answer.
3. If the activity is not held within the framework of an event, provide the necessary promotion.
4. Provide technical guidance to activate recordings.

DURING

1. Have someone greet participants and provide them with directions.
2. Provide technical verifications between each recording.

SUBSEQUENTLY

1. Ensure that the data is archived and that copies are sent to participants.

Documentation practices

What is meant by “documentation”?

In effect, it is the creation and collection of tangible elements and supporting materials related to the knowledge and insights of oral traditions. This section proposes ways to materialize aspects of oral history and culture so that they can be collected, preserved, shared and passed on to current and future generations. Documentation also provides complementary perspectives on a subject and facilitates the creation of material and devices for transmission.

Audiovisual recording

Oral tradition is of paramount importance when it comes to documenting our culture and history. The following are suggested tools that could be useful for preserving elements of traditions and knowledge that, unfortunately, are likely to disappear with the departure of our elders.

Whether the recording is an interaction, an event or even an interview, these images can eventually be used and shared; it is therefore important to know how to handle the camera, to capture optimal images and to obtain ideal sound quality that can eventually be used in a professional production. This section offers advice or suggestions to consider when recording.

Video footage

In the past, audiovisual production required countless equipment and tools that were rather cumbersome. Technological advances have brought about what is called “the democratization of technology”; meaning that what was reserved for professionals is now accessible to everyone, at low cost.

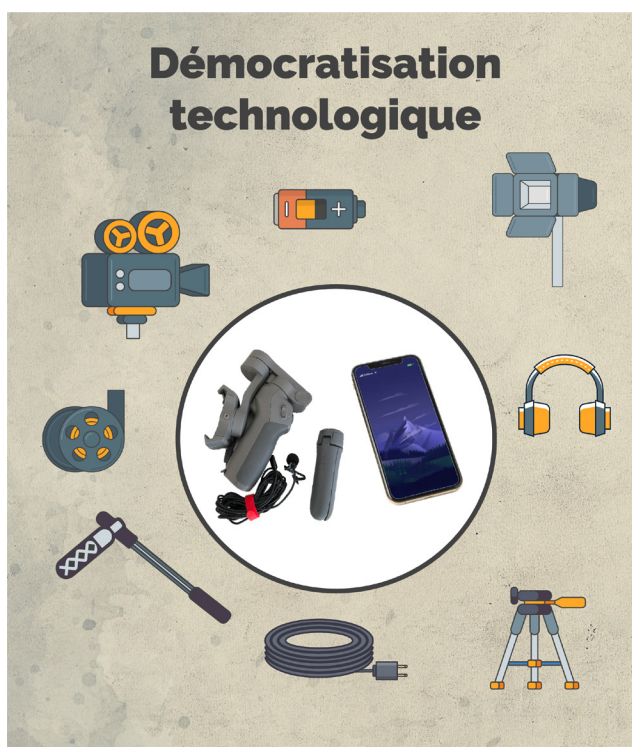
With smartphones, it is now possible to film high quality images without necessarily needing additional equipment.

Four main principles to consider for good footage:

- Framing and camera angles

When filming someone, it is important to portray them in a favourable light. This can be achieved by paying special attention to the following elements:

1. The subject should be positioned in the center and the camera lens should be focused on him/her;
2. Particular attention should be devoted to the camera angle, using a low camera angle should be avoided (an angle where the camera is lower than the subject and points upwards);
3. To capture the most aesthetically pleasing footage, careful attention should be paid to details which may negatively affect the image (such as cans in the foreground, a toilet visible in the background, etc.).
4. If a smartphone is used to capture the footage, it is strongly recommended to shoot horizontally.



- Stability

Stable footage is much more aesthetic and pleasing to the eye. Certain tools, such as a stabilizer or a tripod, can produce such footage. Some of these tools are available at low cost and are suitable for cellular devices.

If you are on a budget or shooting on the fly and don't have time to set up, it is recommended that the camera or cell phone rest on something for support, as this will reduce shaky footage.

- Éclairage

L'éclairage est particulièrement important. Plus il y en a, meilleure sera l'image, surtout s'il s'agit d'une lumière naturelle. Cependant, l'orientation de la source lumineuse a un effet certain sur la qualité de l'image. Il faut éviter de placer le sujet à contre-jour (par exemple devant une fenêtre).

- Sound

As far as sound is concerned, not all smartphones have the same recording quality. It is strongly recommended to use a microphone connected to the device. The ideal situation is to test the sound quality with the subject beforehand.

It is also important to pay attention to extraneous sounds, sounds that are not welcome in the recording and that could diminish its quality. For instance, it might be appropriate to unplug the refrigerator, to turn off the television or to stop the dryer.

Technical checklist of things to remember during a shoot:

- Recharge batteries (stabilizer and telephone) and have on hand the cables for the devices, if needed;
- Clean the lens before starting to ensure a sharp image;
- Perform sound and lighting tests before shooting;
- Shoot horizontally;
- Do not zoom in, as this causes a loss of quality;
- Record as long as possible, informal exchanges sometimes reveal treasures.

Audio frames

Types of devices

There are several types of devices for audio recording, some of which are much more affordable than others. If the budget allows it, the purchase of a voice recorder is strongly recommended, since this device obtains better audio quality and provides a wide range of recording. There are also applications for cell phones that can do the same thing. However, it is strongly suggested to perform quality tests, since the microphones of these devices are not necessarily adapted to audio recording. They can be very sensitive to surrounding noise.



As for voice recorders, it is important to take the time to check their different functions and become familiar with how they work. For instance, one may wonder whether the audio files can be transferred to a computer.

It is also important, during the preparation stage, to make sure that the batteries are new so that no unpleasant surprises will occur in the middle of a meeting. Some devices can work while plugged into an electrical outlet, which is very practical. An extension cord should be included in the filming kit.

Positioning the recording device

If only one device is used, then it should be placed at the heart of the action as much as possible, at an equal distance between the participants. When recording a group discussion, it may be useful to have more than one device, as some people have lower voices that will not be picked up by the device if it is placed farther away. Placing one device in the center of the discussion and scattering the others closer to participants is therefore recommended. There should be no hesitation in performing verifications before starting the official discussion with the participants.

Documenting tangible culture

Collection of information

No matter what type of element is discovered, it is important to keep a record for future use. Producing several models of collection cards adapted to the size of the objects to be documented during the project is recommended. Certain information is essential and should be included on each card:

- Origin: Where is the object located? Who is the current holder?
- Date: When was the object made? Acquired?
- Place of creation: Where was it made? By whom?
- Access conditions: Is it freely available to all or is it part of a private collection?
- The material: Is it a paper document? A photograph? A handmade object? What is it made of?
- Description of the content: What can be seen in the photograph? A summary of the article, a description of the object, its use, etc.?

It is recommended to bring several copies of these cards when working in the field, since it is impossible to predict what will be found.

Once the project is completed, these cards can be transferred to organizations involved in the conservation and promotion of the history and culture of the communities concerned (such as cultural centers, museums, archives, band councils, etc.). This will aid them in keeping an inventory of what is in their community.

File «Collection card»

<https://histoires-perspectives.com/wp-content/uploads/2021/06/Fiche-de-cueillette.pdf>



Photographs

When visiting communities, items relevant to the research are likely to be found in the homes of people encountered. Rarely can these items be retained, either because of their significance to their owners or simply because the space and facilities to preserve them are not accessible. However, keeping a record of these items is practical for collective memory and, eventually, for creating devices of cultural transmission. Consequently, photography is a good means of preservation. Here are some tips and concepts to consider for successful photographs.



Equipment

- Use a tripod: this ensures the same photographic quality for each object and the same photographic plane for each photo.
- Use two light sources on each side of the object, ideally at an angle of about 45 degrees to avoid casting shadows around the object. However, this angle may vary depending on the type of object and material.

Sharpness and image quality

- Use a white or black background: the white colour enables the object's details to be more visible and creates a better colour balance. Black should be used for very pale objects or when a contrasting effect is desired.
- Choose a location with controlled lighting and favour cold light, if possible.

Shooting and framing

The principles of framing and cameral shot angles, as well as lighting, are the same as for video. Here are some specifics about photographing objects:

- Determine a frame for the objects: objects should be placed in the center of the image with an equal amount of empty space on each side;
- Reflect on the orientation of the object: ideally, the object should be placed according to the orientation of its use. For instance, if a photograph of an arrowhead is taken, it should be pointing towards the top of the picture;
- Take pictures from several angles: the recommendation is to take several pictures of each side of the object (front, back and sides) to allow a better understanding of the object;

- Use a scale of relevance: a visual marker in a photograph enables the object's measurements to be determined from the photograph. This can be as simple as placing a quarter near the object. Certain scales can also make it easier to calibrate colours. For smaller artifacts, it is recommended to use black and white scales. The scale should be placed below the object and centered with the latter.

Useful links

Archéolab : How to take successful photographs of artifacts

<https://www.archeolab.quebec/en-coulisses/pratiques-et-astuces/comment-reussir-ses-photographies-d-artefacts#:~:text=Choisir%20un%20lieu%20o%C3%B9%20l,assez%20pr%C3%A8s%20de%20l'objet>

Video : Video – Lighting Techniques for Photographing Heritage Objects

<https://www.canada.ca/fr/institut-conservation/services/formations-apprentissage/ateliers-en-personne/documentation-photographique/techniques-eclairage.html>

Choosing a shot

PDF file photo procedure

https://histoires-perspectives.com/wp-content/uploads/2021/06/procedure_Photo.pdf

Conducting documentary research

Documentary research provides a better understanding of the distinctive characteristics of community involved in the project. It can also be an opportunity to discover research that has already been done, to build on it and avoid duplicating work. Questions are likely to emerge from discoveries, providing an opportunity to personally learn more from community members about certain topics.

Potential Elements

What are the potential elements of documentation?

Possible types of documentation and formats

Throughout our research, it is quite possible that we will come across different formats of documentation, both physical and digital.

The most common formats are newspaper articles, published scholarly articles, books, maps, family trees, photographs, objects, etc.

Audiovisual material may be somewhat less accessible, as some formats require special devices to access the content. Audiovisual material includes CD-ROMs and DVDs, but also film reels, audio cassettes, VHS films, etc.

It should be noted that, libraries or archives generally have the equipment required to access this content.

Checklist

Here are the types of documents you may come across during documentary research:

- Text documents
Reports, newspaper articles, scientific/academic publications, books, etc.
- Iconographic documents
Photographs, pictures, drawings, postcards, posters, prints, paintings, plans, technical drawings, sketches, cartoons, slides, photo essays, etc.
- Cartographic documents
Maps, plans, sketches, etc.
- Audio documents
News reports, interviews, movies, home movies, television series, documentaries, songs, audio books, audio cassettes, compact discs (CDs), video cassettes/video discs, microfiche, radio recordings, television recordings, etc.



How to create a research plan?

A research plan is developed at the beginning of the research phase and evolves throughout the research project. Its function is to consolidate the documentation needs and the potential sources to be explored to complete the documentation. A chart template that can be used to create a research plan is available in the downloadable tools. It can be modified as needed. Here are the key steps for preparing this plan:

- At the beginning of the collection and documentation project, it is recommended to write down all initial leads to be explored;
- As collection meetings progress, new avenues of research will likely be identified. It is therefore possible, to update the chart after each meeting;
- This chart can become a tool for monitoring the progress of the research. For this type of use, regular updates will help keep track of progress.



Where can documentation be found?

Nearly all communities have archives about themselves, often stored in a specific location. Sometimes they are located in the community's educational or governmental institutions. These are good places to look for records relevant to community members. There may also be private archives preserved by individuals. Reaching out to them through community radio or council publications are effective approaches that will promote the project and give it greater exposure.



Regional or national archives should also be considered, as many historical archives are located there. For several years, these centers have been encouraged to digitize their collections and archives, which facilitates research and limits the amount of travel required. The content of these databases is almost always associated with keywords. Therefore, to facilitate the work, it is suggested that key terms or topics be identified.

Archives regarding a community may possibly be located in another province following a recentralization (for example, the Hudson's Bay Company Archives concerning the Cree communities of Quebec are located in Manitoba).

References for online research

Each Canadian province has its own archive with content that is not limited to that province. A tool has been created by the Canadian Archival Information Network; a single search engine allowing access to over 800 archives in Canada.

Canadian Archival Information Network

<http://archivescanada.ca/homeFR?lang=fr>

Bibliothèque et Archives nationales du Québec (BAnQ)

<https://www.banq.qc.ca/accueil/>

Library and Archives Canada (LAC)

<https://www.bac-lac.gc.ca/fra/Pages/accueil.aspx>

Hudson's Bay Company Archives

<https://www.gov.mb.ca/chc/archives/hbca/index.fr.html>

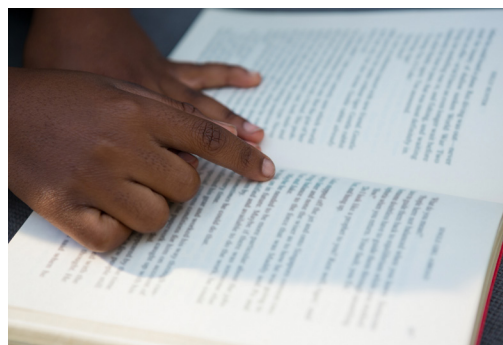
List of archives in Canada from Wikipedia

https://en.wikipedia.org/wiki/List_of_archives_in_Canada

How to understand the content?

For all documents, it is important to understand who the author is and to take into account the context related to its draft. Archival documents were mostly written by Allochthonous people for Indigenous people. The portrayals within these documents therefore represent the personal perceptions of those who wrote them, that is, the perceptions stemming from encounters, practices and events they witnessed. In other words, it is an external view of the community, and therefore this documentary research cannot replace the knowledge of the people encountered during the project. The latter provide perspectives that are much more representative than those found among their community.

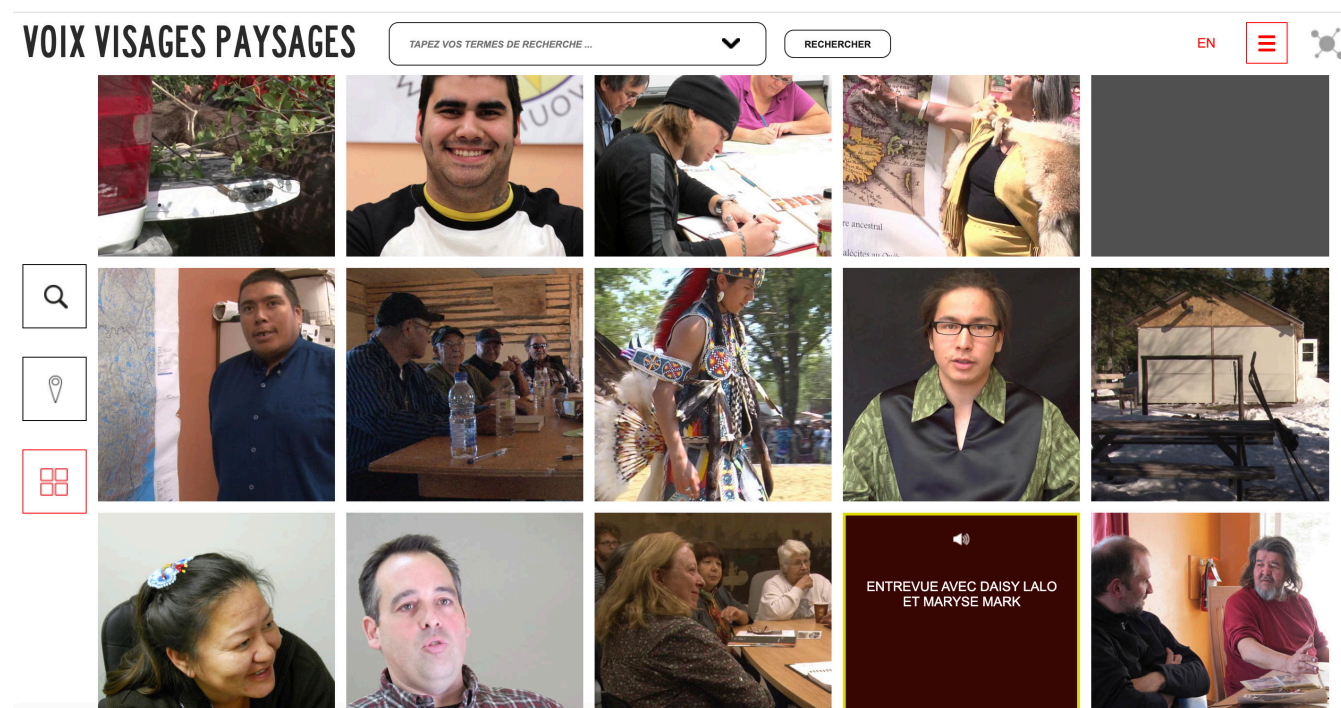
It is recommended to conduct research after a local consultation phase for two reasons. First, because the interviews and the various consultation activities provide more specific leads for research. Secondly, because the perspectives expressed in documentary sources may lead to a false perception that is not compliant with local historical perspectives.



Archives and accessibility

Why archive?

The archiving stage of data collection and documentation allows to build lasting memories that can be shared. It increases the potential for knowledge transmission within a group or community. The archive can represent the purpose or a preliminary step in the development of educational and cultural transmission material. Different strategies can facilitate the creation of this memory as well as its access, because research, despite its great wealth, too often remains undiscovered in boxes that are currently gathering dust. Here are some principles and resources to increase a research's potential to contribute to the knowledge of current and future generations.



Discoverability of collection content

Transcripts

One of the first steps after recording a meeting or an exchange with people is to produce the transcript, namely the verbatim transcription of the statements recorded. It should be noted that, a summary translation may suffice, depending on your project, but this implies that statements may possibly be unintentionally distorted. This work, which will make it much easier to process the content for deriving meaning from statements, can be quite time-consuming. Indeed, unless one writes very quickly, the recording must constantly be paused to complete the notes and rewinded to make sure that nothing is missing. In short, sufficient time must consequently be planned.



When recording roundtable or group discussions, it is recommended to have a dedicated note taker to facilitate future verbatim transcriptions. It is important to record the participants' full names and to jot their initials preceding each intervention throughout the transcript. This makes it easier to navigate through the recording. This also applies to annotated time codes. In this framework, the transcripts can identify, extract and use significant statements. We recommend validating these statements with the individuals involved to ensure that their statements are not distorted or taken out of context.

If the records are to be compiled in a database, verbatim transcripts allow for a quicker understanding of the topics discussed and for the identification of keywords that will facilitate archival research.

Available tools

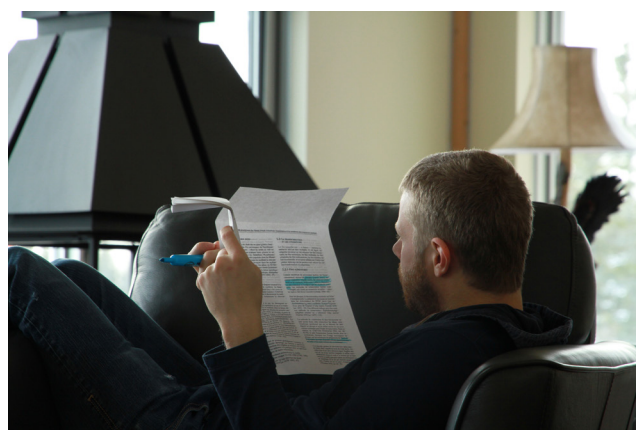
Express Scribe : For a quick and easy creation of verbatim transcripts from audio or video files, the Express Scribe software is ideal. With a simple drag-and-drop of the recording, it can be replayed while the statements are written in another program, while using shortcut keys like pause, rewind for 5 seconds, speed up or slow down, etc. These keys can be used to control the recording as desired without having to always switch between programs.

<https://www.nch.com.au/scribe/fr/index.html>

Summary

Once the verbatim transcription phase has been completed, it may be useful to identify the relevant statements and remove those that are not. This makes it possible to preserve the essence of the recorded discussions and to condense them into a much smaller working document. The summary can take various forms, but the most common are structured or schematic text.

If the intention is to compile the recordings and transcripts within an archive, this summary can also serve as a presentation text of the recordings.



Thematic focus of the content

In historical research, it is often a matter of supporting thoughts or ideas with quotes or sayings. Once the transcript is complete, certain recurring themes will emerge. In order to address these thematic clusters, it is recommended to use colour coding to associate various interventions to a select thematic group. For example, it is possible to highlight all the statements dealing with the settlement of communities with the same colour. These thematic groups can then be grouped together by indicating the themes that link them together.



When audiovisual content is involved, this step can also be carried out at the same time as the verbatim transcription or summary. By using a chart which includes time codes, themes, people, important events and a summary of the content, it is possible to create a very practical tool that enables to quickly search for specific themes among all audiovisual content. An example of a content chart and an adaptable version are available for download in this section.

Available tools

Miro : This tool provides access to an interactive board on which it is possible to make graphics and models, insert Post-its, etc. It is a very useful tool when processing thematic documents (particularly to establish links between emerging themes), but also during team brainstorming sessions, since it allows several people to modify the board simultaneously.

<https://miro.com/app/dashboard/>

Xmind : Xmind is a software for the creation of tree-based structure. It is a particularly useful tool when it comes to displaying the themes and highlighting the links among them. This software can also be useful when it comes time to reflect on the content and means of transmission.

<https://www.xmind.net/>

Indexing and classification systems

Indexing is a technique for classifying documents that will later be reused and analyzed. A simple way to do this is to compile keywords from the thematic process into a chart and to associate the documents that address them. This saves time when searching for documents related to a particular topic. The larger the document database, the more useful this tool will be.

Here is some information that should be included in the index:

- The complete title of the document;
- Its location (particularly for objects and private documents);
- The number of pages or objects (in the same series);
- The author or creator;
- The year of creation;
- The collection to which the document belongs;
- Conditions of use (Is it publicly available? Is the data confidential? Should it be anonymous?);
- A brief and summarized description of the content;
- Keywords associated with the content;
- An access link (if the document has been digitized).

If the documents are to be donated to an organization that already has its own filing system, it may be useful to meet with the person responsible for that system. This procedure is recommended in order to understand the system in question and to allow documentation to be included in the database more quickly and more easily.

Available tools

Google Drive : This Google web space allows research and interviews to be compiled and shared. It also makes it possible for Word or Excel documents to be created and edited with others simultaneously.

<https://drive.google.com/drive>

SharePoint : This Microsoft tool facilitates teamwork by allowing files, data, news and resources to be shared among team members. Many communities use the Office 365 suite, where subscription may include SharePoint.

<https://www.microsoft.com/fr-ca/microsoft-365/sharepoint/collaboration>



Securing and accessing data

Consolidation of archive

Physical and/or online archiving?

It is important to understand the issues related to archiving, as this determines the most appropriate database needed. Whether physical or online, each method has its advantages and disadvantages.

Physical archiving

- Allows access to physical documents directly on site and in one location.
- Ensures better security of documents and artifacts (as long as preservation procedures are respected).
- Requires a space for storing documents (may incur costs).
- Entails specific expenses regarding the preservation of documents (acid-proof cardboard boxes, furniture to securely store artifacts, etc.).
- Provides restricted access to documents and involves travel.

Here are some examples of the types of content for which physical preservation is beneficial: artifacts, original photographs, documents with important signatures, historical documents, etc.

Online archiving

- Is much more economical, given that some tools are available for free.
- Simplifies and secures the management and sharing of information.
- Allows access to documents from any location (with network access).

Here are types of content for which digital preservation is beneficial: videos, sound recordings, project documentation, legal forms, etc.

Available tools

These tools are obviously not the only ones. They are suggestions based on their accessibility, popularity and free availability. There are many such programs or tools available. It is up to us to determine which ones to use.

Google Drive : This Google web space allows research and interviews to be compiled and shared. It also makes it possible for Word or Excel documents to be created and edited with others simultaneously.

<https://drive.google.com/drive>

YouTube : YouTube is an extremely useful platform for archiving audiovisual documents because it makes it possible to safely upload videos and determine the access setting: private, public, accessible through a link, etc.

<https://www.youtube.com/>



Public and non-public archiving

When it comes to archiving content, a few questions need to be asked: Who will have access to the content? Can the archive be used for other initiatives? Do we have the rights to make the data publicly available? Answering these questions requires reflection and assessment of the needs and purpose of the content. For example, if the goal is to inform and transmit a particular cultural practice, then it would be more appropriate to make the content public to benefit a greater amount of people. It is important to reflect on these issues while taking into account the consent forms that will have to be signed and the project's other ethical parameters.



There are several types of archiving. Some offer access to the general public (such as the archives of the Bibliothèque et Archives nationales du Québec (BAnQ)), while others have limited or restricted access (company archives). It does not mean that these archives are inaccessible, but rather that a request must be made to gain access.

It is also possible to create a private archive to store the raw data collected for a project and gradually grant access once the content is processed and presentable. Another way to limit accessibility is to compile the data without classification on a Google Drive folder or on YouTube for audiovisual content. The access link is later shared with those who want to access the content.

Development criteria

The primary purpose of archiving is to keep traces of oral culture, but also to showcase content. However, it is unlikely that the entirety of the content will be preserved, therefore it is important to determine the development criteria in order to know what to preserve.

One of the first criteria is the function and scope of the content, which means considering its meaning. For development projects, it is important to use content with positive images and a positive message. Material showing people in an inappropriate state or that might embarrass participants should be banned. Clips in which the participant stumbles while walking should also be avoided. The images may also reveal subtle social features of the community at the time they were taken: small details that show customs or practices, either in the background, through clothing, language, etc.



An image can have different meanings, depending on the context of use. It is recommended to avoid distorting the content or statements. The tendency of archiving is to ensure that the content is integral, for example, archiving the entirety of a filmed interview, rather than archiving certain excerpts. This method does not prevent us from extracting passages for the creation of a transmission device. When it comes to archiving, it should be ensured that anyone with access has the tools needed to understand the statements expressed. The fact remains that audiovisual documents should always contribute to the development of First Nations communities.

For photographs, the criteria are quite similar to those of audiovisual content. It is important to have the permission of the people in the photograph. For instance, photographs in which a child is easily recognizable raise an ethical concern, as they require parental consent. This type of content should be avoided unless the necessary permissions are obtained. Not all photographs are necessarily useful either, especially when they are duplicates or when they display the same subject with slight variations in the scene.

For visual documents, the concept of aesthetics follows the criteria of relevance, ethics and content development. The following questions should be considered: Should images showing the team at work be archived? The short excerpts filmed which show about ten seconds of landscape? And what should be done with images where the frame, sharpness or colour balance are unsatisfactory?

Transmission and dissemination

Create spaces, places and tools to promote the transmission and transfer of knowledge

We have now reached a point where it is up to us to talk about ourselves. There was a time when we were not obtaining an education and did not have the vocabulary to talk about ourselves. We didn't even have real knowledge about ourselves. But nowadays, we have the knowledge, so why would others talk about us? I believe that we are capable of talking about ourselves.

Yolande Picard, Huronne-Wendat

Realizing that the belongings passed on to members of the community from parents and grandparents [can] be brought together in the same location, for the exhibition, is really a source of pride. Everyone had a little something in their closet, in a small trunk.

Vincent Napish, Innu

This section proposes methodologies and tools for co-creation and production that can be used to produce devices for the transmission and transfer of knowledge related to oral culture, wisdom and cultural knowledge collected during the process of consultation and research. The possibilities are numerous and diverse, ranging in scope in terms of transmission devices. Whether it be an exhibition, a website, a short, medium or feature-length film, an interactive space, a book or other medium, the design and production stages remain similar.

An individual or collective creation?

Designing a device for cultural transmission often requires several areas of expertise. It is therefore very common for the creative process to be undertaken in a co-creative manner. Obviously, the extent of the project desired also influences the number of people involved. This section proposes methodologies that can be adapted to the number of people involved. These methodologies remain relevant regardless of the nature of the project, individual or collective.

What is a transmission device?

When and why to choose the purpose of the cultural transmission and/or dissemination device?

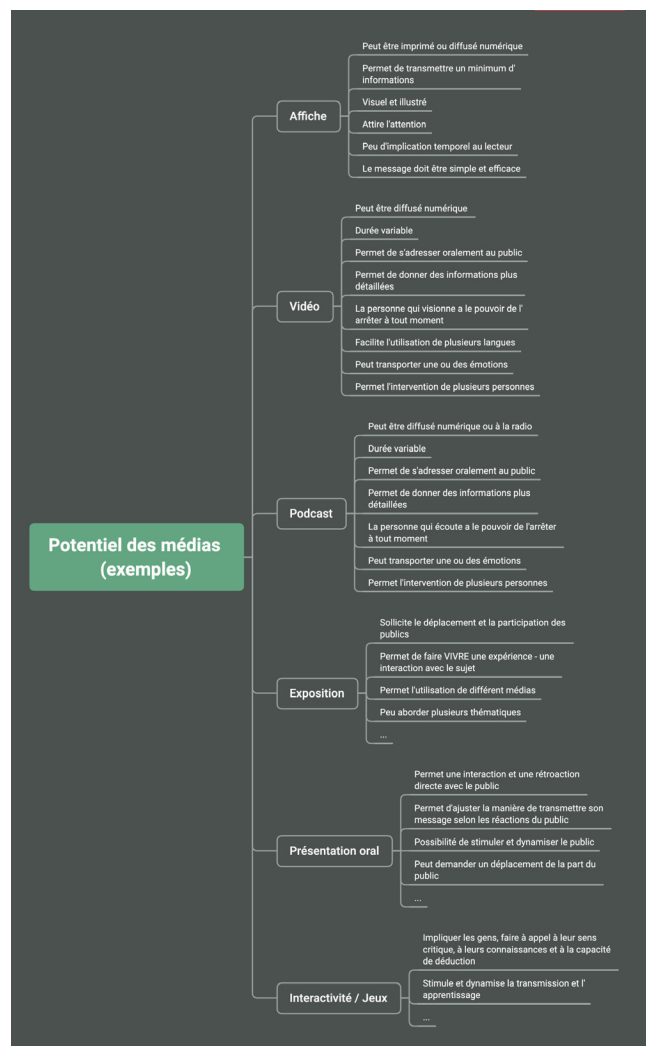
A device is the means (medium or media) chosen to make the collected content accessible in such a way that it be understandable for a given public. As a result, its design often requires the following steps: selection, synthesis or popularization, which increase the interest and knowledge of the selected group. For example, if the device is intended for an audience between the ages of 8 and 12, the level of language, the amount of content and its presentation will be adapted so that the knowledge is accessible and understandable by this public.

There are various means to choose from, which can be determined at the beginning or throughout the project. For instance, if the intention is to present an exhibition, this context dictates the main medium from the start, therefore creation will develop in accordance.

On the other hand, the intention may be to transmit a particular knowledge to a specific public. Thus, during the creation process, various possibilities can be assessed according to possible contexts of use.

Each medium has a different impact, aspect and potential in support of an intention and a message, hence the importance of choosing is well.

Examples of various means and the extent of their transmission are provided in the downloadable tools.



Designing a transmission device

Initiating the design

There are several questions that need to be answered to determine the positioning of the device. These questions will be used to establish the design criteria. The following chart of guidelines is proposed as a working tool. It will allow the necessary information to be gathered as reference throughout the creative process.

This tool is completed throughout the steps proposed.



Intention					
Objectives for transmission and/or dissemination (what?)	Selected public (who?)	Context (when and where?)	Messages (what to remember afterwards?)	Experience (what to experience?)	Means (how?)

Defining the intention and objectives of the transmission and/or dissemination device

The initial intention can be broad. It refers to the impact the project will hopefully achieve. It stems from a need, a request, an observation or an aspiration, and is briefly stated through actions to be undertaken.

Here are some examples:

Number 1

Observation: The young people in my community's elementary school do not know the origin of their school's name.

Intention: Share the history and the origin of the elementary school's name.

Number 2

Besoin: un enseignant souhaite raconter une légende importante dans la communauté, mais il n'a pas le matériel ni les connaissances nécessaires.

Formulation d'intention: transmettre une légende.

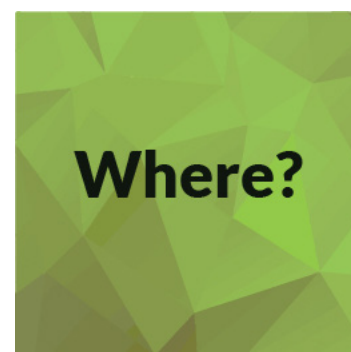
Number 3

Aspiration: I want to share my findings on the history of our community.

Intention: To share the history of our community.

There are many possibilities. Here are some key words that could be found in the intention: transmit, raise awareness, inform, highlight, educate, familiarize, experience (an emotion, an experience, etc.).

Les objectifs de transmission viennent raffiner l'intention du projet. Ils permettent de préciser davantage nos volontés et le but du projet.



Intention					
Transmit a legend					
Objectives for transmission and/or dissemination (what?)	Selected public (who?)	Context (when and where?)	Messages (what to remember afterwards?)	Experience (what to experience?)	Means (how?)
Share our oral tradition					
Promote our language					
Hold an encounter with an Elder and the youth					


Who is the device intended for?

Why is identifying the public important?

It is important to know who the public will be to ensure that the means and media used will appeal to them, as well as information and language that is intelligible and appropriate to their needs and ability to understand.

The project may also be intended for various publics. It is therefore important to know the nature of their diversity making it easier to propose a variety of similar or complementary means.



PERSONA (name)										
 Dessin ou photo fictive	Interests and lifestyle	A day in the life of ...								
	Character traits <table border="1"><tr><td>Discreet</td><td>Expressive</td></tr><tr><td>Optimistic</td><td>Pessimistic</td></tr><tr><td>Thoughtful</td><td>Spontaneous</td></tr><tr><td>Not very active</td><td>Active</td></tr><tr><td colspan="2">...</td></tr></table>		Discreet	Expressive	Optimistic	Pessimistic	Thoughtful	Spontaneous	Not very active	Active
Discreet	Expressive									
Optimistic	Pessimistic									
Thoughtful	Spontaneous									
Not very active	Active									
...										
Age: Place of birth : Place of residence : Occupation or job : Family (children, spouse, etc.) : Training : Work experience :										

How to gain insight about the audience?

The persona exercise may be applied. It is a technique often used in communication and marketing, which is also useful when preparing a cultural transmission project. It involves creating a variety of public profiles which the project will address. A template for creating a persona is proposed in the downloadable tools. This form has been adapted to the context of cultural transmission, but it may be modified as needed. The creation of a persona can be modeled on a familiar individual, which may help in defining the characteristics to be taken into account.

The persona(s) will become a reference during the design process. It is important to refer to it regularly for validation. For example, if one of the characteristics of the persona states that the individual does not know how to handle new technologies but often listens to the radio, the idea of creating a website will be quickly discarded. On the other hand, the idea of creating a podcast for radio broadcast could be retained.

Intention					
Transmit a legend					
Objectives for transmission and/or dissemination (what?)	Selected public (who?)	Context (when and where?)	Messages (what to remember afterwards?)	Experience (what to experience?)	Means (how?)
Share our oral tradition	preschoolers				
Promote our language					
Hold an encounter with an Elder and the youth					

What will be the context setting?

Here, the question is to define when and where the device can take shape.

Here are some questions to enlighten reflection:

Duration and recurrence

Should the device be accessible in the long term

(e.g., exhibition, website, outdoor sign, etc.)?

Is it a one-time event?

Is it a recurring event (e.g., a radio show)?

Available funding

What can be done with the available funding?

Should/can the following fees be paid: rental, broadcasting, etc.?

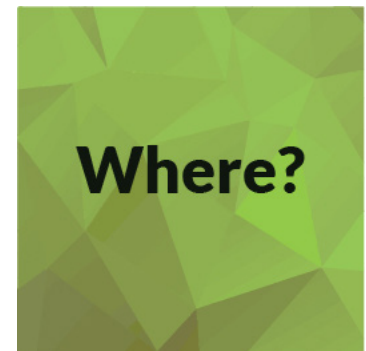
Accessibility

Is an accessible physical location available?

If so, what are the accessibility requirements?

- Indoor or outdoor
- Monitored hours of operation
- Availability of facility (day, week, month, etc.)
- Level of access: open to all or restricted secure access
- Convenience of access: stairs, elevator, etc.

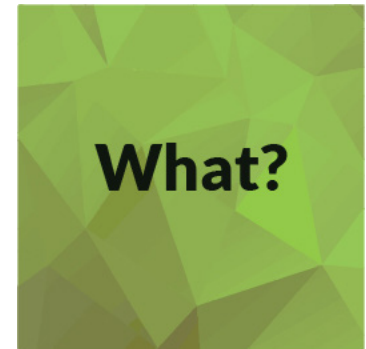
Are these conditions appropriate for the selected public?



Intention					
Transmit a legend					
Objectives for transmission and/or dissemination (what?)	Selected public (who?)	Context (when and where?)	Messages (what to remember afterwards?)	Experience (what to experience?)	Means (how?)
Share our oral tradition	preschoolers	Childcare centre			
Promote our language		The school's kindergarten class			
Hold an encounter with an Elder and the youth		Weekly or once a year			

What is the key message or messages to be conveyed?

The message(s) refers to what the public should remember as a result of experiencing the device. There may be one or more messages, varying in quantity according to the scope of the project. For example, if the device is a one-minute radio vignette, one message will be sufficient, whereas if the device is an exhibition, there may be a greater number of messages.



Example

Intent : To convey a legend

Objectives :

- Share our oral tradition;
- Promote our language;
- Hold an encounter with an Elder and the youth

Messages :

The legend's moral or lesson.

Our Elders are important for the transmission of our legends.

Legends share our history.

Legends are a good way to learn our language.

Intention					
Transmit a legend					
Objectives for transmission and/or dissemination (what?)	Selected public (who?)	Context (when and where?)	Messages (what to remember afterwards?)	Experience (what to experience?)	Means (how?)
Share our oral tradition	preschoolers	Childcare centre	The legend's moral or lesson. Legends share our history.		
Promote our language		The school's kindergarten class	Legends are a good way to learn our language.		
Hold an encounter with an Elder and the youth		Weekly or once a year	Our Elders are important for the transmission of our legends.		

What should be the public's experience?

How should transmission and/or dissemination be experienced? How the public interacts with the transmitted content is very important because it determines how an individual may or may not develop an interest in the subject. It also influences the memory of the latter. If the experience is good and memorable, it is much more likely to have a lasting impression.

In education, it is a matter of pedagogy, whereas the museum field addresses the visiting experience. Yet, both experiences are concerned with how the intention and the content to be transmitted will interact with those for whom they are intended.



Culturally meaningful learning: an experience-based approach

[...] a holistic approach which considers the learner's multiple dimensions, the development of experiential learning and the contribution of different community members (such as Elders) to a participatory culture of knowledge are all components of a pedagogy inspired by Indigenous perspectives^[1].

Our cultural ways of learning have been based on experience for thousands of years. Transmission takes place generally through observation, listening and experimentation. It is through action, interaction and experience that knowledge is acquired and maintained.

How to design the user experience? Here are some questions to enlighten reflection:

Which emotions are solicited?

Which means may prompt these emotions? Testimonials, photographs, etc.

What will be the public's immersive atmosphere?

Examples: calm/agitated, colourful/dark, funny/dramatic, imaginary/real.

Which senses will be engaged and how?

Touch, sight, hearing, taste and/or smell.

^[1] LÉTOURNEAU, Jean-François, et Médéric SIOUI (2019). « L'enseignement des littératures des Premiers Peuples : de l'Histoire aux histoires », Correspondances, volume 24, numéro 5. Consulté le 3 juillet 2019 au : <http://correspo.ccdmd.qc.ca/index.php/document/lenseignement-des-litteratures-des-premiers-peuples-de-lhistoire-aux-histoires/>.

How will the public be engaged?

Examples:

They will have to solve a riddle;

They will look for clues through observation;

They will have to interact with a screen;

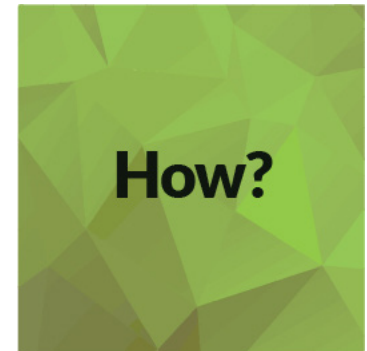
They will be greeted by someone;

Etc.

Intention					
Transmit a legend					
Objectives for transmission and/or dissemination (what?)	Selected public (who?)	Context (when and where?)	Messages (what to remember afterwards?)	Experience (what to experience?)	Means (how?)
Share our oral tradition	preschoolers	Childcare centre	The legend's moral or lesson. Legends share our history.	Colourful and animated (colourful illustration; talking characters, etc.)	
Promote our language		The school's kindergarten class	Legends are a good way to learn our language.	Listen to the legend in our language	
Hold an encounter with an Elder and the youth		Weekly or once a year	Our Elders are important for the transmission of our legends.	A meeting	

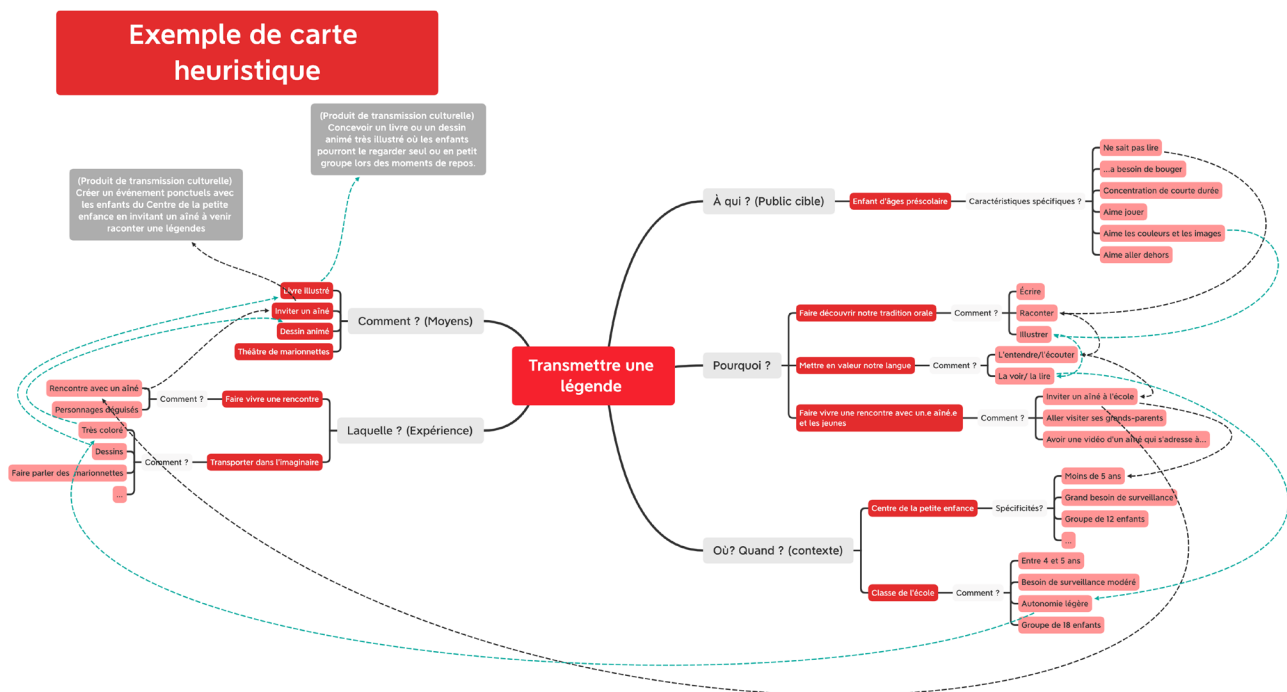
Which means and/or media best correspond to the transmission project?

In light of the previously completed information and the profile of the identified public(s), it is now time to determine what medium would be best to ensure the project's effectiveness and that its objectives are achieved. As there may be several possibilities, this step requires reflection. To assist with individual or collective reflection, it may be useful to refer to the mind map exercise.



How to create a mind map?

A mind map is a tool that allows ideas to be displayed and connections between each element to be visually represented.



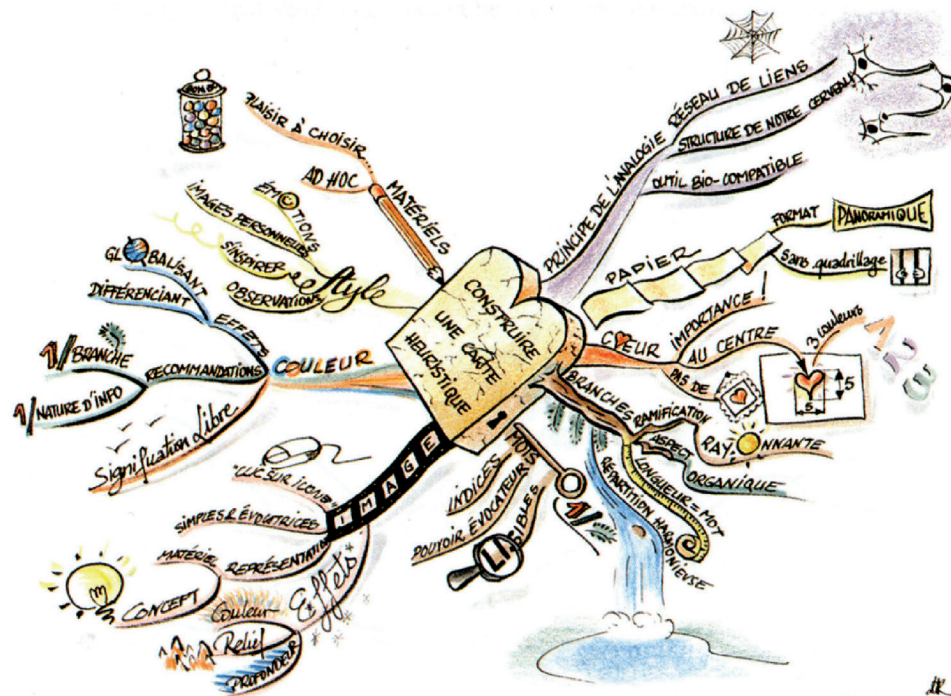
Procedure

1. Place the intention in the center.
2. Create branches from the various information collected and include short descriptions.
3. Create a second level of branches to state ideas for this purpose (how to transmit) or specific characteristics related to the information (what to transmit).
4. Once it seems like all information and ideas are complete, choose elements that seem to fit together and write possible means that address these associations.

To facilitate creativity

- Do not censor yourself.
- Let intuition guide you.
- Combine all ideas and thoughts.
- Allow the position of elements to be moved. (The use of Post-it notes can facilitate malleability).

Mindmapping ou Brainstorming



Quelques règles...

- Ne pas se censurer
- Laisser aller son intuition
- Le faire à la main - peut évoluer
- Mettre toutes ses idées et ses pensées

[1] LÉTOURNEAU, Jean-François, and Médéric SIOUÏ (2019). « L'enseignement des littératures des Premiers Peuples : de l'Histoire aux histoires », Correspondances, volume 24, number 5. Consulted on July 3, 2019 at: <http://correspo.ccdmd.qc.ca/index.php/document/lenseignement-des-litteratures-des-premiers-peuples-de-lhistoire-aux-histoires/>.

Synopsis of a cultural transmission and/or diffusion device

This work process allowed the project in the making to be clearly defined. Depending on the scale of the project, the following phases often require conveying and explaining the project, when seeking funding, introducing the project team or bringing together collaborators. With the information from the chart of guidelines, it is now possible to write a summary that will enable its proper communication. This summary is called a synopsis. The synopsis is usually short, about ten sentences may suffice. Here is the framework for writing an effective synopsis:

Note: Each bullet point corresponds to the information from one column of the chart of intent.

What? The intention of the project.

Why? The objectives for transmission and/or dissemination.

For whom? The selected public.

When and where? The context.

How? The means.

What will be experienced? The experience.

What will be retained at the end of the experience? The messages.