



Documentation Essentials

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Session Objectives

- Introduce key aspects of documentation
- Reflect on information flow across internal teams and external stakeholders
- Examine the skills needed to effectively capture, organize, and document their projects
- Experience sharing CSOs documentation practices

Why do we document?

- It builds trust as the donor feels confident their investment is yielding results.
- It serves to preserve knowledge
- It ensure continuity and accessibility.
- Facilitate decision-making
- Provides a foundation for continued support
- Documentation is the anchor for accountability and sustainability



Importance of Documentation

- Documentation is the art of capturing, organizing, and safekeeping of information regarding a project, process, or initiative.
- It is the tangible blueprint that captures the heartbeat of a project. It is a knowledge management output which serves as a reference and testament to the work done
- It also serves as the map that guides teams through every twist and turn, helping them track progress, measure success, and refer to yesterday to make smart moves today.



Types of Documentation

Project

Proposals,
annual
plans,
concept
notes etc

Technical

SOPs,
Policy
Manuals, IT
protocols
etc.

Financial

Budgets,
Financial
reports,
Expense
forms etc.

Monitoring and Evaluation (M&E)

M&E plans,
Baseline
reports
etc.

Other categories of Documentation

Depending on organisational needs, some other documentation categories may include but not limited to the following:

- Administrative Documentation
- Legal and Compliance Documentation
- Communication Documentation
- Research and Data Documentation
- Risk Management Documentation
- Knowledge Management Documentation
- Marketing and Outreach Documentation
- Event and Workshop Documentation



Common Documentation Challenges

Fragmented Documentation

Teams may store documents in various formats or locations (e.g., emails, physical files, cloud storage) with no standard organization.



Lack of Standardization

There may be no agreed-upon templates or formats for key documents (e.g., reports, proposals, or evaluation forms)



Inefficient Storage & Retrieval Systems

CSOs may struggle to implement effective document management systems, which leads to inefficient information retrieval.

How to Improve Documentation

- **Streamlining Practices with Templates:** Create standardized templates for project reports, proposals, and evaluations to ensure consistency across teams.
- **Consolidating Information in One Location:** Use digital tools to centralize all project-related documents in one place
- **Training Teams on Best Practices:** Regularly train staff on how to organize and label documents for easy retrieval.
- **Implementing Digital Knowledge Management Tools:** Leverage software that supports knowledge management and collaboration



Documentation Tools & Techniques

1. Structured Templates and Forms

Using standardized templates to capture key project data consistently

2. Real-Time Data Capture Tools

Using apps or software to capture data on the go, making it easy to document in real time.

3. Photographic & Audio Documentation

Incorporating multimedia (photos, videos, voice recordings) to support written reports and provide richer context.

Documentation Tools & Techniques

4. Collaborative Editing Tools

Using platforms that allow multiple team members to edit a document simultaneously (e.g., Google Docs, Microsoft Office, Notion, SharePoint).

5. Version Control

Ensuring that all updates and changes to documents are tracked and previous versions can be accessed

6. Stakeholder Feedback Integration

Collecting feedback from internal and external stakeholders to improve documentation quality

Documenting Processes & Outcomes

Capturing Key Decisions and Rationale:

Ensuring that all important decisions are clearly documented with the reasoning behind them for future reference.

Meeting Notes and Action Items

Documenting meeting outcomes and next steps, ensuring everyone is on the same page and nothing is overlooked.

Process Documentation & Reflections:

Standard operating procedures (SOPs), workflows & after action reflections capture learnings to ensure continuity when team members leave or new ones join.

Structuring & Organising Documents

File Naming Conventions: Implementing a consistent approach to naming files for easy retrieval and sorting. A digital catalogue with links allows people get the documents they need easliy

Folder Structures for Easy Access: Organizing project-related documents into logical folder categories, making information easier to find. Example

Project ABC > Phase 1 > Budget

Project ABC > Phase 1 > Reports

Project ABC > Phase 1 > Monitoring Data

Cloud Storage Solutions: Using cloud-based tools (e.g., Google Drive, Dropbox, SharePoint) to store and organize files centrally, ensuring easy access and collaboration.

