



LEARNING BRIEF

Documenting strategically for good knowledge management

6 ideas for project learning

Part of good knowledge management and learning is ensuring that project documentation is done regularly, systematically, and professionally on schedule. Organizations that leave documentation to the donor visit or project close are in danger of missing wonderful results or rushing the process and doing it poorly. When documentation is done poorly, incomplete information is collected and learning is compromised.



Many Gantt charts become obsolete because the people directly involved in documentation activities are not involved in the scheduling process. The project field personnel, for example, must be involved in planning for success story documentation because they are more likely to suggest the best beneficiaries, schedule interviews, and give you the best budget for the logistics.

Think of your documentation beyond merely being accountable to the donor. What results do you want? Do you want to showcase results for objective areas? Is it to justify your approaches? Is it to collect impact numbers? Is it to have 10 good case studies for your annual report?

Are field staff equipped and trained to take photographs with cameras or phones? Do they have voice recorders to be able to accurately record and transcribe beneficiary stories? Do they have documentation templates for success story collection tools and consent forms?

Do not underestimate the time involved in planning for field documentation. At least 2 weeks are required for desk review, scheduling field interviews, pre-documentation site visits and procurement. When timelines are tight organizations pay higher than market rates or select the wrong consultant.

Post-field fatigue and 'dumping' of collected information on a desk or flash disk is unwise as memory loss often occurs. Working through information at this point is tedious. It is best to sort, categorize, and verify field information within 1-2 days of returning from the field while your memory is still fresh.

For learning to take place, information must be translated into knowledge by asking questions like 'What did we learn from using this approach?' What were our beneficiaries not happy with? What was not successful? This should involve all levels- executive, middle level to junior staff and field staff to cull all good practices and lessons learnt.

Tips for better field documentation

1. Note that consultants should never be sent to conduct field documentation without a project/programmes person as this can lead to misinformation from beneficiaries and hostility from other stakeholders like local governments or even the community.
2. Always develop checklists for every documentation you want to conduct to ensure you get all the information you need for better learning.
3. Always collect more information than you need. It is better to have many stories or approaches to document than to have too little content with gaps that cannot be filled until the next field trip.
4. Never authorize use of equipment before personnel are trained on its usage. Always plan for budget friendly equipment use training for all personnel who go to the field to preserve the lifetime functionality of the equipment and to create a multi-skilled resource base. Look beyond the traditional –for example, the field driver can be trained to use the camera to be able to support the communication specialist conducting the interviews.
5. Calling consultants early during the planning process ensures that these experts are able to advise you on more budget-friendly products and help you manage timeline expectations by drawing from their vast experience.
6. For photo documentation, it is best to review photos captured while in the field as you may find you have taken hundreds of unusable photos. You will then have an opportunity to revisit the site and take better photos; if you have already left the field, retaking photos will be difficult and delay documentation. Create a folder with your best photos for each success story. This will ensure you have a good selection for your reports and other communication materials.
7. A learning session can be as simple as a 15 minute Skype call, a recorded session during weekly Monday meetings, or a knowledge café which is an informal gathering (with refreshments and snacks) focused on a strategic learning goal. The learning session should be included on the editorial calendar because it has critical outputs for the organization-what we are learning. A learning document should be created and updated throughout the project lifecycle.
8. Have a dissemination strategy: Contrary to the hoard-all-information mentality (fueled by the competition for donor funds) showcasing your learning widely positions you as a thought leader in your particular sector which qualifies you to receive more funding. There are many non-traditional channels that provide extra mileage for your dissemination efforts. Apart from the traditional printed books, nonprofits can consider digital publications embedded with live links that connect with their social media, websites and are easier to share with publics beyond national borders.

For example, don't develop your annual report and leave it at that –instead extract parts of it and use them in your Facebook postings; use an impact number in your Twitter; use a success story on LinkedIn and a great photo on Instagram. Interlink all your platforms for greater reach.

Where to find more resources:

Impact and Innovations Development Centre www.iidcug.org