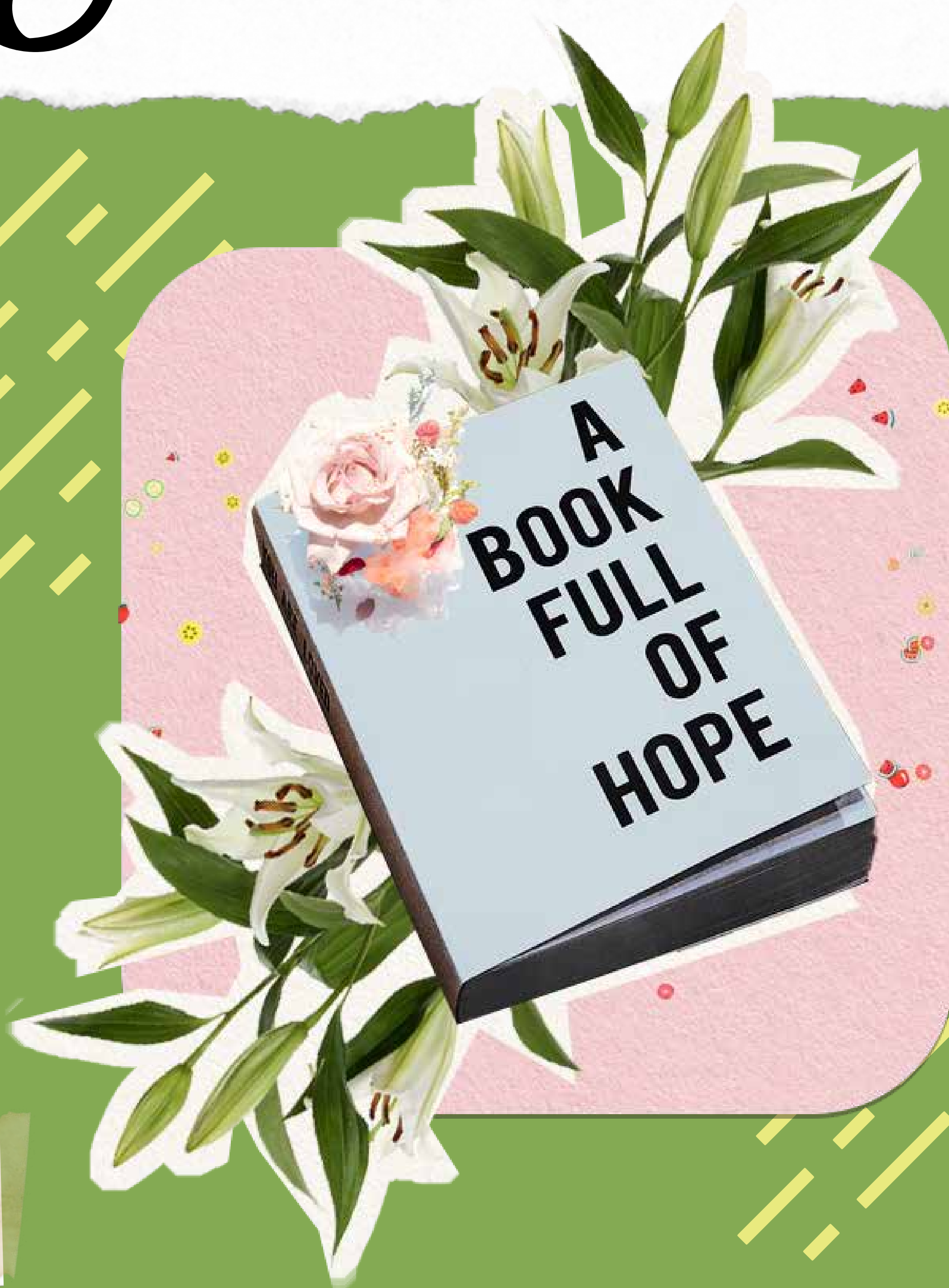


DOCUMENTATION & RECORD KEEPING



CONTENTS

WHAT IS THIS RESOURCE PACK? 3

HUMAN RESOURCES 7

FINANCE 9

PROJECT MANAGEMENT 11

EVENT MANAGEMENT 12



WHAT IS THIS RESOURCE PACK?

This resource pack is a collection of forms, templates and tools that will help you improve and legitimize the documentation processes and record keeping practices within your organization. The objective of this resource pack is to promote transparency and encourage accountability in your organization's everyday functions. Good recordkeeping helps an organization function efficiently and ensures accountability to its members and the public.

WHY IS DOCUMENTATION AND RECORD KEEPING IMPORTANT FOR CIVIL SOCIETY ORGANIZATIONS?

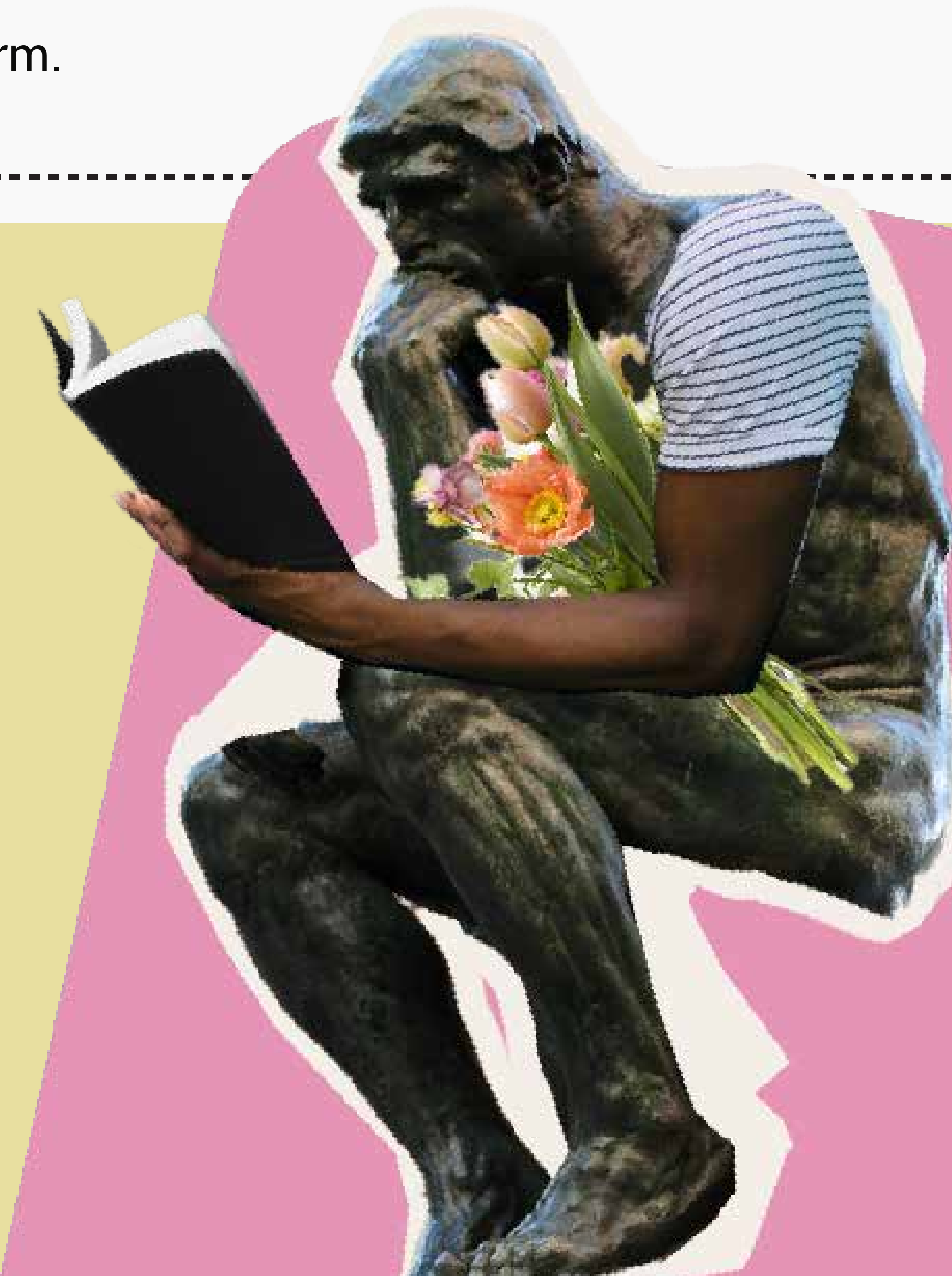
Information is a primary organizational asset that is needed now and into the future. Good recordkeeping underpins the provision of good business information. It can help you to find the information you need. It promotes the creation of full and accurate records in the first place. It also involves storing and managing records appropriately so that the information will be available to you when you need it. It can also assist you to promote information sharing and collaboration.

WHAT DOES THIS RESOURCE PACK INCLUDE?

This resource pack includes record keeping tools and templates pertaining to four core areas: Human Resources, Project Management, Finance, Event Management. This contains a variety of forms, templates, tools, checklists, and other resources you can utilize to enhance your existing administrative functions. For example, this resource pack provides templates for writing project proposals, checklists for effective financial management, structures for workshop reports and sample forms for references and applications. These documents will be useful to the everyday functions of your organizations – both in the short-term and long-term.

HOW DO I USE THIS?

You can use the templates and forms in this resource pack as a direct tool. However, it is highly encouraged for you to customize these tools according to the needs and requirements of your organization and its practices. For example, you can insert your company logo and contact details in the header or footer to customize these templates. You can change the colours and designs of these templates to suit the theme and branding of a particular event. In addition, you can edit, amend, and expand these tools to suit your specific requirements. We encourage you to take ownerships of these tools and make them your own.



HUMAN RESOURCES



For organizations, keeping accurate records can help recruitment, identify gaps in skills, and save time while performing administrative duties. If you're looking for one way to improve your human resources practices, then this resource pack will be of good use to you.

While filling out forms and using templates for the smallest of tasks can be tedious and boring, remember that accurate and well-organized records are great resources in the future. HR recordkeeping is also helpful in supporting and documenting the organization's employment actions.

This resource pack on human resources consists of a wide range of templates you can use. Some resources included here: Work Logs, Standard Contracts, Job Application Forms, Daily Planners and information for recording and reporting incidents of violence.

[YOU CAN ACCESS THE FULL RESOURCE PACK HERE.](#)

FINANCE

Civil society organizations have an obligation to act as responsible stewards in managing their financial resources. Nonprofits must comply with all legal and financial requirements and should adhere to sound accounting principles that produce reliable financial information, ensure fiscal responsibility, and build public trust.

The recording system of your organizations' financial transactions allows to monitor bank balances, status of funds receipts and expenditures, and a comparative statement of budget vs. actual expenditure on a regular basis.

This resource pack on finance consists of a wide range of templates you can use. Some resources included here: Invoice Templates, Cash Receipt Templates, Expenditure and Budget Management Template and a Financial Management Checklist.

YOU CAN ACCESS THE FULL RESOURCE PACK HERE.



PROJECT MANAGEMENT

The process of managing project files and records is important for many reasons. Firstly, it supports ease and efficiency of the project activities. It allows teams to find required information when needed. It also protects the project data from unauthorized access and use.



Project Records are the only mechanism for maintaining traceability of various activities done and decisions made during the project. Well-managed records will not only help you manage a project, but they will also help you and others the next time round. Well organized and accessible records allow people to review what has gone before and either avoid pitfalls or see how to get out of them.

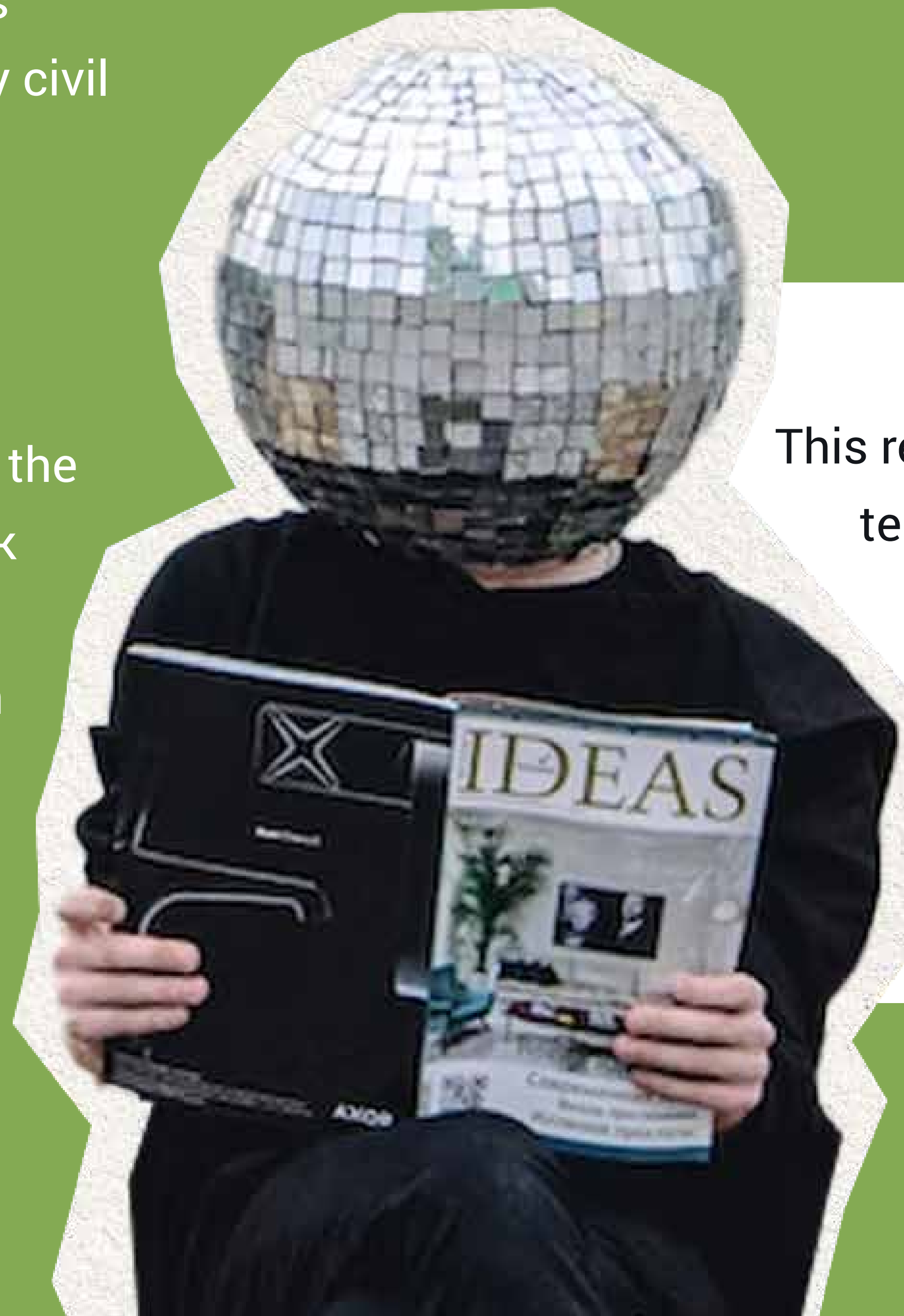
This resource pack on project management consists of a wide range of templates you can use. Some resources included here: Project Proposal Template, Project Report Template and An Executive Summary Template.

[YOU CAN ACCESS THE FULL RESOURCE PACK HERE.](#)

EVENT MANAGEMENT

A certain amount of record keeping and core documentation is required when organizing any kind of event or workshop. Many civil society organizations have a tendency to repeat same project activities throughout multiple projects.

Sometimes organizations also don't prioritize following the necessary documentation – especially when having to ensure the safety and integrity of the participants. Others tend to overlook important documentation processes such as evaluations and feedback – which can be crucial in measuring the successfulness of an event and ensuring the effectiveness of future interventions.



This resource pack on event management consists of a wide range of templates you can use. Some resources included here: Workshop Report Template, Consent Forms, Attendance Sheets and Evaluation Forms.

[YOU CAN ACCESS THE FULL RESOURCE PACK HERE.](#)

Fin.