



Encompasses all devices

Information management involves collecting, managing, storing and disseminating the right information to the right people at the right time. Even with little or no dedicated staff, small organisations can still establish some general methodological and procedural principles.



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WHAT IS THE PURPOSE ?

Establishing good information management practices is a long-term investment that can help staff to improve their overall operational decision-making when carrying out project monitoring activities. Amongst other things, a well-designed information management system ensures that there is a structured approach to data (contacts, agendas, beneficiary data, infrastructure etc.) and project documents (needs assessments, meeting reports, mission reports, budget monitoring and site monitoring etc.).

This can help to mitigate the impact of frequent team turnover and the involvement of a diverse range of actors in a single project. It can also facilitate access to earlier data or data from other contexts and it can help to avoid collecting the same data more than once. Good information management practices can also make it easier to document impact, by ensuring that there is complete, accurate, up-to-date, relevant and understandable information about the project in question.

This document outlines some ways that you can improve two key dimensions of your project information management system: data management and document management.

Prerequisites

- None

WHAT ARE SOME TIPS AND TRICKS FOR MANAGING DATA?

Phase	Tips and tricks
Collection	Establish that there is a need for data collection and choose the most appropriate quantitative and/or qualitative method(s) (direct observation, group discussions, beneficiary interviews etc.), whilst also checking the availability of secondary data sources online (by carrying out internet research) and asking partners working on the same topic or in the same context about any other relevant data sources.
Management	Ensure that each database: <ul style="list-style-type: none"> • Has a data dictionary that enables individuals to understand the data (e.g. for a given variable « MUAC » the dictionary provides an explanation such as «Mid-Upper Arm Circumference of infants aged 0-5 years, in millimetres») • Is structured using unique identifiers, i.e. codes that uniquely identify an essential element in the database (infrastructure, administrative data, beneficiaries). This is useful if you wish to link different collections or databases with one another.
Analysis	Make sure that they have been validated and cleaned and are ready to be analysed and transformed into actionable information.



SOME TIPS AND TRICKS FOR MANAGING YOUR DOCUMENTS

Phase	Tips and tricks
Needs assessment	Before starting your project, take some time to think about the types of documents that you will need in order to make good decisions. For example, initial needs assessment reports; site identification reports; site terms of reference; quotations; contracts; site monitoring documents; final project impact reports; and project feedback etc. Create a schedule with a plan of action and deadlines for the completion of these documents.
Implementation	Make sure that you have templates for each type of document so that everyone in the project and the project support structure is on the same page and no time is wasted writing each of the documents. If a group of individuals are working on a document, think about using the « track-changes » mode to help coordinate the writing process.
Management, archiving, and dissemination	Name your documents in a uniform manner so that they are easy to understand (e.g. « 2017_report_SSU_Eval_Agri ») and, where necessary, note the draft (V0, V1, V2...) and/or the document author (initials). Take care to document the procedures implemented in the different projects phases so that they can inform future activities. At the end of the project, make sure that all documents necessary for successful implementation have been archived and are accessible to all members of the organisation who might need to refer to them for other purposes.

SOME TIPS AND TRICKS FOR SAVING AND ARCHIVING YOUR DOCUMENTS

Phase	Tips and tricks
Saving	Save your documents regularly by copying them onto an online platform (such as Framasoft, Dropbox, OneCloud, Pydio...), a server belonging to the organisation and/or an external hard drive. Make sure that the data is saved using appropriate security procedures, identifiers and chronological labels so that, if necessary, it is easy to access and restore them.
Archiving	At the end of a project, archive the reports and databases that document the project so that others can benefit from the knowledge that has been acquired in the future. Always archive the final «publication-ready» versions (e.g. in .pdf format) but make sure to include modifiable draft versions as well, so that it is possible to make use of this content in the future.



Far from being exhaustive, these tips aim to provide a framework for organisations that have yet to establish their own information management policy. If you have the time and resources, it is a good idea to try and learn more about good information management practices and to think about developing a more comprehensive organisational strategy on these topics.

