Appendix C: Creating Documentation

Some tips and a checklist

At various points in the Toolkit, we prompt you to document your organization's policies, procedures and decisions. This **documentation** provides a paper trail for future decision makers and future users to understand past decisions. Good documentation can also help make training for staff, volunteers and interns more efficient and consistent. Write it down now, you'll thank yourself later!

Creating documentation is also an opportunity to engage your stakeholders in goal-setting and future planning. Groups to involve in developing and reviewing documentation might include boards, advisory committees, staff, and volunteers. You might also consider sharing your draft documentation with colleagues at other organizations to gather feedback.

Tips for creating effective documentation:

- Give your documents titles that clearly explain what policy or process is being documented, e.g. *Digital Collection Development Policy*, or *Photo Digitization Workflow.*
- Use clear, concise, specific language. Avoid the use of jargon or technical terms, or include a glossary or term definitions.
- Keep documentation together so that instructions and policies are easy to find. Consider compiling a manual or handbook.
- Test your workflows and processes before publishing or putting into use.
- Save multiple copies of your documentation in multiple locations. Control document changes so that they can't be accidentally edited.
- Create a schedule for reviewing your processes and policies.

Checklist of documentation recommended in the Toolkit	
☐ Digital Mission Statement	☐ Quality Control checklist
☐ Digital Collection Development Policy	☐ Digitization log (with QC checks)
☐ Deed of Gift form with digitized/born-digital language	☐ File naming convention
☐ Permission form	☐ Data dictionary
☐ Takedown policy	☐ Inventory of digital collections
☐ Harmful content statement	☐ Schedule for checking digital storage
☐ Digitization workflow	☐ Digital preservation plan