



FORUM FOR SOCIAL INITIATIVES (FSI)

Regional Training Report Effective Record-Keeping, Data Management, Report Writing, Proposal Development & Project Management

Dates: June 12-14, 2025

Venue: Sewa Kendra, Patna

Participants: Practitioners from 14 partner organizations

Coverage: All 38 districts of Bihar



This three-day regional training equipped participants with essential skills in documentation, data management, proposal writing, and project management. The programme combined conceptual clarity with hands-on practice, covering record-keeping fundamentals, reporting frameworks, proposal development, and emerging AI tools for development work.

Laying the Groundwork: Day 1 focused on building robust documentation systems. Participants explored the "6E Framework" (Efficiency, Evidence, Evaluation, Economy, Empowerment, Enhancement) and learned to categorize organizational records—governance, financial, HR, program, and statutory. Sessions on data storage, compliance, and audit readiness emphasized how systematic record-keeping strengthens organizational credibility and donor confidence. Interactive discussions revealed common documentation gaps in field practice, helping participants identify areas for immediate improvement.

Sharpening Communication & Planning: Day 2 centered on report writing, documentation, and project management. Participants learned to structure impact-driven reports, document best practices and Minutes of Meetings, and maintain branding consistency. The proposal development session equipped teams to draft donor-ready proposals for funding agencies like Tata Trusts and Vedanta Foundation. Essential project management tools—Theory of Change, Gantt Charts, RACI matrix, and M&E frameworks—were introduced through practical exercises, enabling participants to plan, monitor, and evaluate projects systematically.

Embracing Innovation: Day 3 introduced AI-powered tools for development work. Participants explored ChatGPT, Gemini, Canva, and Gamma for report writing, data analysis, design, and presentations. A dedicated session on ethical AI use covered data privacy, bias awareness, and human oversight—emphasizing that AI enhances rather than replaces human judgment. Participants practiced creating reports, posters, and presentations using these tools, gaining confidence in leveraging technology for efficient documentation.

The training successfully transformed how participants view documentation—from a mundane administrative task to a strategic tool for impact storytelling and organizational growth. Armed with practical skills in record-keeping, proposal writing, project management, and AI integration, participants are now better positioned to strengthen their organizations, build donor trust, and drive meaningful change in their communities. The collaborative learning

environment and peer exchanges further enriched the experience, creating a network of practitioners committed to professional excellence and accountability.

"Good documentation is not paperwork—it is the story of our impact, told with clarity and credibility."

