



Communications is capacity

Create systems, processes and archives that institutionalise organisational communication

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Preface

For many non-profit organisations, communications often sits at the edge of the work—something done after programmes are implemented, reports are written, or events are completed. Yet communications is not an add-on. It is a core institutional function that connects programmes, strategy, partnerships, and public understanding of the work. When approached this way, it helps build trust, strengthen relationships with communities and funders, and ensure that efforts reach the people they are meant to serve.

Many grassroots organisations in India are doing significant work but face challenges in communicating their impact—often due to limited budgets, small teams, or the absence of structured communication systems. Developed through a partnership between Axis Bank Foundation and India Development Review, with IDR serving as the knowledge partner, this playbook is part of a series of seven that aims to provide practical, accessible guidance organisations can use regardless of size or resources. Together, the playbooks are designed to walk the reader through the essential building blocks of organisational communications.

This playbook, titled *Create systems, processes and archives that institutionalise organisational communication*, shows how non-profit organisations can build internal systems and archives to collect and organise their communications work and build a resilient and effective communications function.

These playbooks are not meant to be read only once or followed in a strict order. Organisations can return to them at different stages of their communications journey, using them as references while planning campaigns, documenting programmes, or strengthening internal communication systems.

At the end of each playbook, you will find short exercises and reflective prompts designed for teams to discuss together. These are meant to help organisations pause and reflect on their current practices, and consider how communications can better support their mission and goals.

Used together, these playbooks aim to help organisations treat communications not as a separate activity, but as a system that strengthens the work they already do.

Introduction

In the previous playbooks, you explored different aspects of strengthening communications within your organisation—from recognising why communications should be embedded in how organisations work, to assessing communications capacity, planning resources, shaping narratives, documenting impact through case studies, and choosing the right channels to share stories.

The next step is to ensure that the stories, photographs, data, and materials your organisation produces are systematically collected and organised so they can be used effectively across those channels.

In many social non-profit organisations, communications is driven by short deadlines and limited resources. It is often initiated only when a funder update is due, a social media post needs to be shared, or a project report must be completed. Over time, this reactive approach makes communications dependent on individuals rather than systems. Knowledge sits in personal folders, processes remain undocumented, and valuable learning is often lost when staff move on.

Institutionalising communications means embedding it into everyday organisational practices—how work is documented, how stories are shared, and how relationships with communities, partners, and funders are sustained.

This playbook introduces the idea of institutionalisation and explains why a communications archive and clear processes are central to this effort. It provides practical steps and templates to help embed communications into the daily functioning of your organisation.

Institutionalising communications helps non-profits retain knowledge and learning and ensure continuity.

How to use this playbook

This playbook will help your organisation move from individual-led communications to systems that retain knowledge and support continuity.

- Read it with the communications lead and team members involved in communications, programmes, and leadership.
- Use the steps outlined to assess how communication materials and processes are currently stored and managed.
- Identify gaps in documentation, templates, and shared systems.
- Use the activity at the end to begin building a communications archive and documenting key processes.

By the end of this section, readers should be able to:

- Understand why institutionalising communications is important for organisational continuity.
- Identify the materials and knowledge that should be preserved in a communications archive.
- Document key communications processes within the organisation.
- Establish basic systems, standards, and responsibilities for communications management.

I. Why this matters for non-profits

When communications is not embedded in organisational systems, several challenges emerge:

- **Loss of institutional memory:** When staff leave, knowledge about past work, messaging, and contacts often leaves with them.
- **Inconsistency:** Without shared standards, tone, and templates, messages vary across reports, social media, and donor communication.
- **Inefficiency:** Teams spend time recreating formats, rewriting descriptions, and searching for old files.
- **Ethical risks:** In the absence of documented practices, consent, storytelling norms, and data protection rely on individual judgment.

II. How to institutionalise communications

Institutionalisation involves creating simple systems that help teams document, organise, and reuse communication materials and knowledge.

Step 1: Identify the role of communications in your non-profit as well as your audience

How does communications support your organisation: through fundraising, advocacy and policy engagement, community engagement, or marketing? Identify your key audience.

Step 2: Take stock of what already exists

Most organisations already have a large body of communication material. What is often missing is clarity on what exists, where it is stored, and whether it is still usable. Conduct an audit to identify gaps, duplication, and inconsistencies.

- **Content:** reports, newsletters, blogs, social media posts
- **Visuals:** photographs, videos, design files
- **Messaging:** organisational descriptions, programme summaries, impact language
- **Communications products:** organisational presentations, annual reports, proposals, brochures
- **Contacts:** media, donors, partners
- **Practices:** who creates content, who approves it, where delays occur

This audit reveals duplication, gaps, and opportunities for reuse.

PAUSE AND REFLECT

Does this sound familiar?

- Important photos, reports, or presentations are stored across team members' personal folders or devices.
- Teams spend a lot of time searching for old files or recreating documents.
- Messaging, templates, or contact lists are known only to a few individuals.
- Communication processes are understood informally but are not documented.

If your response to any of these scenarios was yes, then your organisation may already have valuable communication materials. The next step is to organise them so they remain accessible, reusable, and part of the organisation's shared knowledge.

Step 3: Build a communications archive

An archive is the foundation of institutional memory. It is not merely a repository of old files, but a system that allows knowledge to be retained, accessed, and reused.

Explore available tools such as [Google Drive](#), [SharePoint](#), and [Dropbox](#). Each of these has a 'How To' section, making it easier to start using them.

At a minimum, the archive should contain:

- **Brand and identity:** logos, colours, fonts, visual guidelines
- **Key messages:** organisational description, programme summaries, impact language
- **Content library:** reports, articles, newsletters, social posts
- **Images and media:** photographs, videos, consent documentation
- **Templates:** case studies, presentations, press notes, emailers
- **Processes:** editorial workflows, approval steps, ethics guidelines
- **Contacts:** media, partners, funders (with appropriate data protection)

How to structure the archive

Use a shared system your team already works with (**Google Drive, OneDrive, Dropbox**). Organise it using a simple, consistent structure, for example:

- 01_Brand
- 02_Key_Messages
- 03_Content
- 04_Images_Videos
- 05_Templates
- 06_Processes
- 07_Contacts

Adopt a standard file-naming convention and maintain a clear distinction between current files and archived material. This reduces duplication and makes information easy to retrieve.

Step 4: Document communications processes

The first step towards institutionalising communications is to build organisational memory and document processes.

For each major activity—reports, campaigns, social media, donor communication—document:

- Where ideas originate (staff meetings, briefings, weekly calls, or driven by a team member)
- Who creates the first draft
- Who checks for accuracy
- Who provides final approval

- Where the final version is stored

The aim is to ensure continuity when staff leave and to reduce uncertainty about roles and responsibilities.

Step 5: Establish shared editorial and ethical guidelines by listing out the following:

- **Tone of voice:** formal, conversational, practitioner-focused
- **Language norms:** clarity, avoidance of jargon, use of regional languages where relevant
- **Ethical principles:**
 - Informed consent for stories and images
 - Avoiding stereotypes and sensationalism
 - No exaggeration of impact
 - Respect for confidentiality and anonymity

Embedding these standards ensures that quality and ethics are institutionalised and do not depend on individual discretion alone.

Step 6: Develop templates

Create standard formats for:

- Case studies
- Newsletters
- Social media posts
- Press notes
- Presentations

Step 7: Assign ownership and responsibilities

- **Archive owner:** maintains structure and access
- **Content lead:** updates content in accordance with guidelines

Create a handover checklist so that when staff leave, files, contacts, and institutional knowledge remain with the organisation.

Step 8: Put basic safeguards and governance in place

- Set view and edit permissions for shared folders.
- Identify confidential or sensitive material.
- Document how personal data, images, and stories are stored.
- Ensure that consent and privacy practices are consistently followed.
- Review key messages, templates, and workflows regularly.

- Keep brief records of what has changed and why.
- Institutionalise governance and archiving practices by driving conversations on archiving and troubleshooting in weekly/monthly team meetings across all departments.

Quick recap

By building archives, documenting processes, and using common standards, non-profits can retain knowledge and reduce duplication. These practices strengthen ethical communication and ensure continuity during staff transitions.

What you can do next

The following activity helps identify risks in your current communications setup and take initial steps towards institutionalising knowledge and processes.

Step 1: Individual reflection

Ask each team member:

What would be lost if a key staff member were unavailable tomorrow?

Consider:

- files or folders known only to one person
- templates or contacts stored on personal devices
- undocumented approval processes
- knowledge about messaging or ethical practices

Step 2: Group discussion

Share responses and group them under three categories:

- Knowledge
- Materials
- Processes

Identify areas where:

- there is no shared archive
- processes depend on individuals
- documentation is missing

Step 3: Connect to the playbook

Using the playbook, identify:

- what should be added to a communications archive
- which processes should be documented first
- where templates or guidelines could reduce reliance on individuals

Step 4: Create a three-month action plan

Agree on two priority activities for the next three months, such as:

- setting up a shared communications archive
- documenting one key communication process
- creating or standardising templates
- assigning ownership for maintaining the archive

Conclusion

A shared archive, clear processes, and common standards allow non-profits to reduce dependence on individuals, save time, and retain hard-won learning.

Communications, when treated as a core institutional function rather than a series of tasks, becomes a strategic asset that supports accountability, strengthens relationships, and builds long-term organisational capacity.

- See the playbook *Assess strengths, understand gaps, and prioritise your organisation's communications* to assess where your organisation stands on knowledge management and archiving communications resources.
- Read the playbook *Write case studies that show your organisation's impact through stories and data* to build a case study to understand how to collect information and stories

**KNOWLEDGE
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