



THE
PUBLIC GOOD
INSTITUTE

Learning in Service of Tomorrow.

MEMBER BRIEFING

Documentation Is Leadership

A member briefing on documentation as memory, accountability, continuity, defensible practice, supervision, and public trust.

Prepared by The Public Good Institute

Learning in Service of Tomorrow

MEMBER RESOURCE | 2026 Launch Library



Core Brief

Documentation is not just paperwork. In public-serving systems, documentation is memory, accountability, continuity, supervision, evidence of judgment, and protection for people, staff, organizations, boards, and communities.

Leadership Principle

Good documentation does not mean documenting everything. It means documenting the right things clearly enough that a future reader can understand what was known, what was decided, why it was decided, what happened next, and who was responsible.

What defensible documentation should do

- Record facts separately from opinion, interpretation, and professional judgment.
- Show the decision path: what information was available, what options were considered, and why a choice was made.
- Capture risk, protective factors, context, voice, consent, culture, community considerations, and follow-up.
- Support continuity when staff, shifts, supervisors, programs, or service partners change.
- Avoid unnecessary, stigmatizing, speculative, or excessive detail that does not support care, service, accountability, or legal/regulatory requirements.
- Reduce duplication and administrative burden where repeated documentation does not improve safety, quality, learning, or accountability.

Documentation Quality Audit

Audit Area	Quality Questions
Timeliness	Was the record completed close enough to the event to be reliable?
Factual clarity	Can the reader separate facts, observations, reports from others, and professional interpretation?
Decision rationale	Is it clear what was decided, why, and by whom?
Risk and safety	Are relevant risks, protective factors, immediate actions, and follow-up clearly recorded?
Voice and context	Where appropriate, is the voice of the person served and relevant cultural/community context reflected respectfully?
Follow-up	Are next steps, owners, timelines, and review points clear?

Audit Area	Quality Questions
Supervision and escalation	Does the record show when supervisory, clinical, legal, cultural, or executive input was needed and obtained?
Burden review	Is any documentation duplicative, unnecessary, or disconnected from care, service quality, accountability, or required reporting?

Five Documentation Practices to Strengthen Immediately

- 1 Create a decision rationale field for major decisions so staff do not bury judgment in long narrative notes.
- 2 Use short incident learning templates that capture what happened, what contributed, what changed, and who owns follow-up.
- 3 Audit one month of records for duplication, missing rationale, unclear follow-up, and unsupported conclusions.
- 4 Train supervisors to review quality of judgment, not just completion of forms.
- 5 Review documentation burden alongside workforce wellbeing, because unnecessary paperwork can become a service quality and retention issue.

Do Not Document

- Speculation presented as fact.
- Labels or stigmatizing language that do not support service or accountability.
- Unverified assumptions about culture, motive, credibility, family dynamics, or community context.
- Excessive personal detail unrelated to safety, service quality, legal/regulatory obligations, or decision-making.
- AI-generated content that has not been reviewed, corrected, and owned by a human decision-maker.

Source Notes

These Public Good Institute resources are original educational and implementation materials. They are informed by public policy, governance, workforce, digital government, and Indigenous data governance sources, including the following:

Government of Canada - AI Strategy for the Federal Public Service 2025-2027

<https://www.canada.ca/en/government/system/digital-government/digital-government-innovations/responsible-use-ai/gc-ai-strategy-overview.html>

Canada - National Artificial Intelligence Strategy: AI for All

<https://ised-isde.canada.ca/site/ised/en/canadas-national-artificial-intelligence-strategy-ai-all>

Treasury Board of Canada Secretariat - Directive on Automated Decision-Making

<https://www.tbs-sct.canada.ca/pol/doc-eng.aspx?id=32592>

Government of Canada - Guide on the use of generative artificial intelligence

<https://www.canada.ca/en/government/system/digital-government/digital-government-innovations/responsible-use-ai/guide-use-generative-ai.html>

OECD - Governing with Artificial Intelligence

https://www.oecd.org/en/publications/governing-with-artificial-intelligence_795de142-en.html

FNIGC - The First Nations Principles of OCAP

<https://fnigc.ca/ocap-training/>

Health Canada - Pan-Canadian AI for Health Guiding Principles

<https://www.canada.ca/en/health-canada/corporate/transparency/health-agreements/pan-canadian-ai-guiding-principles.html>

Health Canada - Reduced administrative burden: Nursing retention toolkit

<https://www.canada.ca/en/health-canada/services/health-care-system/health-human-resources/nursing-retention-toolkit-improving-working-lives-nurses/reduced-administrative-burden.html>

Imagine Canada - People First: A Portrait of Canada's Nonprofit Workforce

<https://imaginecanada.ca/en/research/people-first-canada-nonprofit-workforce>

Important Use Note

This resource is for learning, planning, governance, and implementation support. It is not legal advice, privacy advice, procurement advice, clinical advice, or a substitute for organization-specific professional review. Organizations should adapt all tools to their legal, regulatory, contractual, cultural, community, and operational context.