



— I N H A R M O N Y ™ —

— F R E E R E S O U R C E —

ORGANIZATIONAL EPISTOLEUS GUIDE

A Step-by-Step System for Documenting What Matters Most

The Epistoleus role is one of the most underutilized assets in any mission-driven organization. When done well, it preserves your story, protects your legacy, and creates continuity across leadership transitions. This guide walks you through how to do it right.

STEP 1: DEFINE YOUR DOCUMENTATION SCOPE

Before you document anything, decide what you're capturing. Not everything deserves an entry — but the right things, preserved correctly, become your organization's institutional memory.

Why this matters: *Documentation scope prevents burnout and ensures consistency. Without boundaries, historians and recorders either capture too much or too little.*

- Programs and initiatives (with goals, outcomes, and participation data)
- Leadership rosters and transition records
- Financial milestones and budget summaries (non-sensitive)
- Community partnerships and external relationships
- Awards, recognitions, and chapter/organizational milestones
- Critical decisions and the rationale behind them

STEP 2: ESTABLISH YOUR DOCUMENTATION STRUCTURE

A consistent structure makes your records navigable. Use the following format for each documented period or event:

1. Period/Cycle Identifier — Semester, fiscal year, or program cycle
2. Leadership in Office — Names, roles, and terms served
3. Programs & Initiatives — What was planned vs. what was executed
4. Key Decisions & Outcomes — What was decided, why, and what resulted
5. Challenges & Lessons Learned — Honest notes for future leaders
6. Legacy Notes — Recommendations for the incoming team

Why this matters: *Structure creates continuity. When the next team inherits a consistently organized archive, they can lead from context rather than starting from scratch.*

STEP 3: SELECT YOUR TOOLS

Choose tools your team will actually use. The best system is the one that gets maintained.

- Cloud storage (Google Drive, OneDrive, SharePoint) for file organization
- Shared folders with restricted editing access
- Standardized naming conventions: YYYY_ProgramName_Document

- Annual archive folders with sub-folders per pillar or category

Why this matters: Accessibility and permissions protect your records from accidental edits or loss while ensuring the right people can always find what they need.

STEP 4: ESTABLISH A DOCUMENTATION RHYTHM

Documentation should happen throughout a term — not just at the end. Build it into your operational calendar.

- Monthly: Update program logs and key activity records
- Quarterly: Compile financial summaries and partnership updates
- At transition: Complete a full Legacy Report before leadership changes
- Annually: Conduct an archive review and ensure completeness

Why this matters: End-of-term documentation is rushed and incomplete. Rhythmic documentation captures context while it's still fresh.

STEP 5: CLOSE WITH A LEGACY REPORT

Before any leadership transition, the outgoing team completes a Legacy Report — a structured summary that hands institutional knowledge to incoming leadership.

- What we accomplished (and what we did not)
- What we would do differently
- Key relationships to maintain or develop
- Unfinished business or initiatives in progress
- Our advice for the team that follows

Why this matters: The organizations that lead consistently across generations are the ones that institutionalize knowledge transfer. A Legacy Report is the bridge between what was and what comes next.

READY TO GO DEEPER?

This resource is just the beginning. Here's how to take the next step:

 Questions? hello@alwaysinharmony.com General inquiries & resources	 Free 30-Min Consult Book at alwaysinharmony.com No commitment required	 Department Support strategy@alwaysinharmony.com Strategy & customized solutions
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