

— F R E E R E S O U R C E —

LEGACY PLANNING STARTER KIT

Begin Preserving What You've Built — Before It's Gone

Every organization has a story worth keeping. Legacy planning is not just for large institutions — it is for any organization that cares about what happens after the current leadership moves on. This starter kit gives you the tools to begin building a legacy documentation system from the ground up.

PART 1: THE LEGACY INTERVIEW GUIDE

Conduct a Legacy Interview with each outgoing leader. Use these questions to capture institutional knowledge that lives in their experience — not in any document.

Why this matters: *Most organizational knowledge is held by people, not systems. When those people leave, the knowledge leaves with them. This interview creates a bridge.*

1. What was the most significant thing accomplished during your term?
2. What decision would you make differently, and why?
3. What relationships are most important for your successor to maintain?
4. What initiatives are currently in progress that need immediate attention?
5. What do you wish you had known at the beginning of your term?
6. What does this organization do exceptionally well that should never change?
7. What is the one thing you would tell the next person stepping into your role?

Interview Format:	30–45 minutes, recorded with permission, transcribed and filed in the Legacy Archive.
Who Conducts:	Incoming leadership, designated Epistoleus, or a neutral facilitator.

PART 2: ARCHIVE SETUP TEMPLATES

Use this folder structure to build your Legacy Archive. The names in brackets are suggested — adapt them to your organization's language.

-  [YEAR] Legacy Archive
 - ↳  Annual Summary Report
 - ↳  Program Documentation
 - ↳  Financial Summaries
 - ↳  Leadership Records
 - ↳  Legacy Interviews
 - ↳  Media & Photography
 - ↳  Incoming Leadership Transition Notes



Why this matters: *Consistent folder structure across years means future leaders can find any record from any era — without asking the person who left.*

PART 3: LEADERSHIP TRANSITION PROMPTS

Complete these prompts within 30 days of any leadership transition:

What we accomplished:	
What remains unfinished:	
Key contacts to maintain:	
Documents transferred:	
Access credentials transferred:	
Incoming leader's first 30-day priorities:	

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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