Legacy Documentation Plan

Division:
Position:
Name:
Date:

Component	Information Captured
Key Contacts & Relationships	Key contacts (internal & external) and their relationships to the position's functions
Assignments	List and description of the position's assignments
Deliverables	List and description of the position's deliverables, status of work in progress and deliverables not yet started
Activities	The position's activities which are not planned or part of a deliverable
Meetings	List and detail on meetings regularly attended/coordinated by the position
Vital Information	Catalog and storage location of vital information pertinent to this position: (1) technology, (2) processes, (3) other information as applies to the position

Key Contacts & Relationships

Description: A list of key contacts (both internal and external) and details/definitions of each relationship.
Purpose: The purpose of this component is to identify and define the relationships of the position's key contacts.

Completing the Key Contacts & Relationships worksheet
► List and complete all columns for each key contact you maintain in this position
► Relationship Description column: Identify relationship type, responsibilities and services provided/received
► Comments column: Include additional information about the contact (as necessary)

External or Client Relationships/Contacts

Name	Organization	Address	Phone & Email	Relationship Description	Comments
(Insert rows as needed)					

Internal VDSS Relationships/Contacts

Name	Division/Office	Location	Phone & Email	Relationship Description	Comments
(Insert rows as needed)					

Assignments

Description: A detailed list of current assignments which may include regular ongoing projects and/or special assignments
Purpose: Provide an overview of the position's current assignments

Completing the Assignments worksheet
►Replace "Assignment" below with the assignment title
►Insert additional response columns as needed for each assignment
►Insert additional rows to include further key information as appropriate
►Input the response to each key information item as applicable

Key Information	Assignment	Assignment	Assignment	Assignment
Describe the assignment and its purpose				
Identify your role (supervisor, lead analyst, team member)				
Identify all parties involved (team members, contractors, etc.)				
Identify frequency of assignment				
Identify timeframes (deadlines, schedules)				
Identify recipient(s) of the assignment				
Provide current status (in progress, under review, etc.)				
Identify action steps for completion				
Identify where assignment information is stored (shared drive location, file folder name)				
Identify resources				
Identify risks and/or lessons learned				

Deliverables

Description: A list of tangible deliverables that are currently in progress or have not been started (reports, documents, plans, etc.)
Purpose: Identify the deliverables assigned to the position

Completing the Deliverables worksheet

►Replace "Deliverable" below with the deliverable title
►Insert a separate response column for each additional deliverable title
►Insert additional rows to include further key information as appropriate
►Input the response to each key information item as applicable

Key Information	Deliverable	Deliverable	Deliverable
Describe the deliverable and its purpose			
Identify your role			
Identify how input is received (from who and/or where)			
Identify frequency of deliverable			
Identify timeframes (e.g. deadlines, schedules, etc.)			
Identify reviewer(s)			
Identify recipient(s) of the deliverable			
Provide current status (e.g. in progress, under review, etc.)			
Identify action steps for completion			
Identify where information on the deliverable is stored (e.g. shared drive location, file folder name, etc.)			
Identify resources			
Identify risks and/or lessons learned			

Activities

Description: A list of activities that are not part of a deliverable or assignment. These are miscellaneous responsibilities that need to be transferred. Examples may include:
• Coordinating social events
• Back-up hard drive
• Provide travel information for newcomers
• Organize/present internal training sessions
Purpose: Identify activities that are not directly part of the position's essential responsibilities, but which support the organization's goals & objectives

Completing the Activities worksheet

►Insert additional response columns as needed for each activity
►Insert additional rows to include further key information as appropriate
►Input the response to each key information item as applicable

Key Information	Activity	Activity	Activity
Describe the activity and its purpose			
Identify your role (coordinator, leadsperson, supervisor, etc.)			
Identify all parties involved (team members, participants, recipients, etc.)			
Identify frequency of activity			
Identify activity due dates (if any)			
Identify action steps for completion			
Identify where activity information is stored (shared drive location, file folder name, etc.)			
Identify resources			
Identify risks and/or lessons learned			

Meetings

Description: A list of meetings regularly attended and/or coordinated by the position (e.g. committees, ad hocs, taskforce, all staff, one-on-one, etc.).
Purpose: Identify and provide a detailed schedule of the position's recurring meetings and related responsibilities

Completing the Meetings worksheet
►Replace "Meeting Title" below with the meeting title
►Insert a separate response column for each additional meeting
►Insert additional rows to include further key information as appropriate
►Input the response to each key information item as applicable

Key Information	Meeting Title	Meeting Title	Meeting Title
Identify meeting frequency (daily, weekly, etc.)			
Specify set day/time and/or location (as applicable)			
Specify meeting format (face to face, conference call, online meeting, etc.)			
State meeting purpose or objectives			
Identify your role			
List the type(s) of input you provide			
List the deliverables you provide (or feed into)			
Identify chairperson/facilitator (name/contact information)			
List attendees and their role			
Identify meeting coordinator (name/contact information)			
Identify scribe (name/contact information)			
Describe how to ensure actions are followed up and completed on time			
Provide meeting minutes storage location			

Technology & Processes

Description: A list of vital information pertinent to this position related to technology and processes.
Purpose: The purpose of this component is to identify information pertinent to this position and its source and/or storage location.

<u>Technology</u>

►List all technologies used by this position aside from MS Office programs (software, applications, database, etc.)
►Complete the description and purpose of information and its source location (file paths, intranet/internet site, etc.)
►Provide additional comments if needed (special instructions to obtain/access information, frequency of usage, etc.)

Technology	Description & Purpose	Information Source / Storage Location	Comments

<u>Processes</u>

►List all documented processes used by this position (manuals, procedures, standards, etc.)
►Complete the description and purpose of information and its source location
►Provide additional comments if needed (special instructions to obtain/access information, frequency of usage, etc.)

Process	Description & Purpose	Information Source / Storage Location	Comments