

LEGACY DOCUMENT CHECKLIST



LETTER FROM YOU

- Welcome new VISTA/person
- Advice, encouragement
- Your contact information

INTRODUCTION

- Explain purpose of legacy binder
- Project mission/vision/values/goals
- Table of contents

CONTACTS

- Names & pronouns
- Positions
- Emails & phone numbers
- Their role in VISTA project
- Organizational chart

OFFICE PROCEDURES

- Printing, scanning, supplies, passwords
- Office culture & personnel
- Dress code
- Reoccurring meetings
- Office hours, breaks
- Email, work calendar

TRAINING OPPORTUNITIES

- Email lists
- Organizations to follow
- Recurrent training opportunities
- Possible conferences
- Tuition reimbursement
- Books, resources, webinars
- Mentors on campus & within community

LOCAL LIVING

- Public transportation
- Grocery stores, malls, shopping
- Local County Assistance Office
- Doctor's Offices
- Parks
- Social Events (especially free)



Campus Compact
New York & Pennsylvania



LEGACY DOCUMENT

CONTINUED

SUSTAINABILITY PLAN

- Personnel
- Organization of Materials
- Record Keeping
- Advisory Council Membership
- Advisory Council Plan
- Marketing- Strengthen Relationships
- Marketing- Buy-In
- Finances/Funding
- Assessment Plan
- Potential Challenges
- Plan for Adaptation

EXIT REPORT

- Summary of project accomplishments
- Summary of project timeline
- Current & ongoing activities

RESOURCE DEVELOPMENT

- Existing budgets
- Campus grant department
- Grant needs or future plans
- Existing fundraising events
- Grants databases

VOLUNTEER MOBILIZATION

- Volunteer recruitment plan & materials
- Volunteer position descriptions
- Volunteer training plan & schedule
- Volunteer management plan & policies
- Volunteer handbook
- Current volunteer names, contact info
- Volunteer leaders

PERFORMANCE MEASURES

- List of all performance measures & targets
- Tools used to track numbers, narratives etc.

