

[Insert Organization Name Here] Officer Transitions Meeting Agenda
[Insert Date Here]

I. Introductions [Record Attendees present]

II. Review/Recap of the Previous Semester or Year [Be Specific and Record in transition documents/notes]

- A. What went well and how do we know it went well?
 - a. I.e. Planning Signature Events, Meetings, Communication, Recruitment, etc.
- B. What are some areas for improvement and why?
 - a. I.e. Attendance at Signature Events, Commitment from Members, Retention, etc.
- C. What are things you wish you knew/had known before starting your role?
 - a. I.e. How to [Fill in the blank]?, Event Planning Process, Financial Processes, Who to talk to about [Fill in the blank]?, etc.

III. Administrative Processes and External Resources: [Walk through these various tools and websites pertinent to your organization]

- A. Atlas: RFPs, B2P, Event Planning/Registration, Concur, etc.
- B. MIT Engage/DoSportsEasy: Roster Updating, Creating Event Pages, Submitting Forms: Supplemental Funding, Travel Forms, etc.
- C. Virtual EMS/Classrooms@MIT: Booking Space and Event Reservations
 - a. <http://web.mit.edu/eventguide/>
- D. ASA Recognition Procedures, Space Allocation, General Body Meetings, etc.
 - a. <http://web.mit.edu/asa/>
- E. UA/GSC/CSC Websites for Funding Allocations and Additional Resources
 - a. <http://ua.mit.edu/>
 - b. <http://gsc.mit.edu/>
 - c. <https://clubsports.mit.edu/>

IV. Internal Operations and Procedures: [Explain what the organization does and how to do the what]

- A. Communication Methods:
 - a. Slack, Email/Listservs, Facebook Messenger, Google Calendar, GroupMe, etc.
- B. Marketing/Publicity:
 - a. Website, Social Media, Apparel/Merchandise, Newsletters, Publications, Print Media (CopyTech), etc.
- C. Funding/Revenue:
 - a. FinBoard Allocations, GSC Funding, Sponsorships, Fundraising, Donors/Alumni, Membership Dues/Fees, Ticket Sales, Event Registrations, etc.
- D. Recruitment/Retention:
 - a. Activities Midway, CPW, Rush/Formal Recruitment, Awards/Recognition Program, Application Process, Interviews, Selection Criteria, etc.
- E. Meeting Structure and Format:
 - a. Executive/Officer Meetings, General Body Meetings, Committee Meetings, Reports, etc.

V. Specific Officer Roles and Responsibilities: [Recommend doing a general overview regarding Goals and Expectations in a large group setting and then break-out sessions with incoming and outgoing officer pairs based on specific roles]

- A. Goals for the Upcoming Year
- B. Expectations for the New Officers to Establish and Follow
 - a. President/Chair/Captain or Equivalent
 - b. Vice President/Co-Chair/Co-Captain or Equivalent
 - c. Treasurer/Primary Financial Signatory or Equivalent
 - d. Secretary or Equivalent
 - e. Other/Optional Officers
 - i. Marketing/Publicity Chair or Equivalent
 - ii. Social Events Chair or Equivalent
 - iii. Recruitment Chair or Equivalent
 - iv. Other Key Committee Chairs

VI. Key Introductory Meeting with Key Offices/Departments: [Schedule/Coordinate an introductory meeting with certain MIT staff]

- A. Staff/Administrators/Offices to know [dependent on type of organization]: SAO, CAC, DAPER, FSILG, OGE, ORSEL, etc.
- B. Advisor(s), Alumni, Community Partners, etc.

VII. Follow-Up: [Schedule a follow-up and/or check-in meeting about a month after new officers have assumed their roles to do some consultation/advisement]