Date:

From Whom, to Whom:

**Past Presidents’ future contact information**

Name:

Email:

Phone:

Name:

Email:

Phone:

**Other documents to view alongside this transition document**

**Basic Information about the SIG**

**Our Mission**

**Bylaws location:**

**History of SIG**

Incorporation:

Re-approval:

Other:

**Current Initiatives**

**Past Initiatives**

**Finances & Fundraising**

**Financial Information** *(including budget/expenses, bank account information, etc)*

Typical Budget

Typical expenses

Bank account information *(where, account numbers, who opened, who co-signs, etc)*

**Incorporation Information** *(who did it, what’s the process for filing taxes and staying on top of the status, if the group relies on a campus group’s 501(c)3 status, etc)*

**Dues information**

**Fundraising Plans/Ideas**

**Vendor information** (*for events, invitations, gear, etc)*

**Other notes around finances and fundraising**

**Structure of SIG**

**Officer Descriptions**

**President** (Elected when?)

**Treasurer** (Elected when?)

**Vice-President** (Elected when?)

**Secretary** (Elected when?)

**Board Members?**

**Recent grad or student representatives?**

**Regional Coordinators?**

**HAA Connection**

SIG Director: Name, e-mail address

SIG Staff: Ryan Ford & Lauren Brodsky, [ryan\_ford@harvard.edu](mailto:ryan_ford@harvard.edu), [lauren\_brodsky@harvard.edu](mailto:lauren_brodsky@harvard.edu).

**Harvard Campus Connection / Relationships**

Organization, name of contact person, e-mail of regular or event-specific contacts on Harvard Campus

**Potential Yearly Calendar**

**January:**

Harvard Wintersession

**Late Jan/Early February:**

Officers attend HAA Alumni Leadership Conference

**March:**

Harvard Spring Break

**April:**

**May:**

**Late May:**

End of school year

**June:**

**July:**

**August:**

**September:**

School starts back up

**October:**

**November**

**December:**

Regional Holiday Parties

**Technical Logistics**

**Website**

Link:

Login:

Password:

Tech people to contact:

**How to sign up to be a member**

**Conference Call**

Phone number & Access code

Other information

**E-mail addresses**

E-mail address

How to access

How to Set Up e-mail forwarding

**Survey Monkey Survey Tool**Login & Password

**Qualtrics Survey Tool**

Login & Password

**Newsletter**

Currently sent using what tool?

How often?

What types of articles go in them?

Username & Password

**Social Media**

**Facebook**

Page:

Administrators?

**Twitter**

Username: @

Password:

**Linkedin**

Page link

Administrators?

**Other**

**Physical Property**

Property owned by SIGs (banners, business cards, t-shirts, mugs, etc)

Location of property

**Former Officers**

*List all former officers here, including contact information*

**Issues that we (as former SIG leaders) have questions and concerns about:**

*This is a section for you to write more of the nitty gritty about what has gone on with the SIG, things that could be improved, and things that may need to be addressed in the future. Keep notes in this section to maintain institutional memory, even if the issue is no longer current, the hot spot has been addressed, or the best practice has continually been implemented. The goal is for this section (and your SIG) to outlive your presidency.*

**Issues in the past**

**Hot spots that my need attention**

**Other Initiatives \****especially those discussed but never completed, and why*

**Best practices so far**

**Things to keep in mind:**

THIS IS A VIRTUAL ORGANIZATION; this may make it more difficult (but not impossible) for you to engage alumni in your SIG.