

Sample Outgoing Officer Transition Meetings

SAMPLE A

OUTGOING AND INCOMING OFFICERS PRESENT

- Overview of agenda and discussion of goals of the meeting
- History of the group from past to present
- Review short and long term goals, and progression toward them
- Review of financial status and accounting history of the group
- Overview of past year's programs, events, and activities
- Successes
- Areas of improvement
- Advice for the future
- Internal review (overview of internal group affairs
 - Successes with membership participation/development
 - Areas of difficulty/areas for improvement
 - Advice for the future

INCOMING OFFICERS AND ADVISOR PRESENT ONLY

- Discussion of role of the Advisor (refer to your Student Organization Handbook for Role of Advisor worksheet)
- Discuss goals of the group for the upcoming year
- Discuss ideas for internal group development
- Discuss budget and fundraising ideas

SAMPLE B

OUTGOING AND INCOMING OFFICERS PRESENT

Welcome and Introductions

Icebreaker

Overview of Meeting

The Year in Review

- Review goals from previous year
 - What did we hope to accomplish?
 - How well did we do on each goal?
 - Which goals should be continued?
 - Which goals should be changed/altered?
 - Which goals should be dropped?
- Review programs and activities
 - What activities/programs did we sponsor?
 - How effective was each program?
 - Did we have a good balance of different kinds of programs?
 - Did we do any community service?
 - Were the programs/activities consistent with group goals?
 - Which activities should be continued and which activities should be dropped?
- Review membership
 - Do we have enough or too few members?
 - How effective were our membership recruitment efforts?

- Are members enthusiastic about the group's activities and motivated to work towards the group goals?
- Were there adequate opportunities for members to get involved in responsible and meaningful ways?
- Review officers and organizational structure
 - Do officers understand their responsibilities and roles within the organizational structure?
 - Is the amount of time and effort required of each officer equal, or are some expected to work more than others?
- Review organizational operation
 - What could be improved?
 - Were the finances adequate for the group's activities?
 - Were meetings run effectively?
 - Was the frequency of meetings appropriate?
 - Is there a committee structure? If so, is it working? If not, is it needed?
 - Are there scheduling conflicts between the group's meetings and other meetings/classes?
- Review advisor involvement
 - Were there adequate opportunities for the advisor to be involved in the organization? Did they become involved?
 - Could advisor improvement be involved? If so, how?

Goals

- What are major strengths of the organization?
- What areas need improvement?
- What are the major things that need to be accomplished in the following year?

Officer Transition

- Have each of the new officers meet individually with their predecessor and discuss the following:
 - Responsibility of the position
 - Timetable for completing duties of the position
 - Unfinished projects
 - Important resources and contact persons
 - Mistakes made that could have been avoided
 - Advice the outgoing officer wishes she had been told before assuming the office last year
 - Any questions the new officer may have for the outgoing officer
 - Where the outgoing officer can be reached for questions

Wrap-up and adjourn