

Sample Officer Transition Meeting Agenda

PART I: Both outgoing and incoming officers are present with advisor

- Overview of the agenda and discussion of the goals of the meeting
- History of the group: From past to present
- Review short and long term goals, and progression toward them (Goal-setting activity strongly recommended)
- Review of financial status and accounting history of the group. (Review past budgets requests & budget allocations)
- External review: Overview of past year's programs, events and activities
- Successes
- Areas for improvement
- Advice for the future (Evaluation forms strongly recommended)
- Internal review: Overview of internal group affairs
- Successes with membership participation/development
- Areas of difficulty/Areas for improvement
- Advice for the future

PART II: Outgoing officers leave while incoming officers continue with advisor

- Discussion over the role of the advisor in the student group (Advisor Expectation Checklist activity suggested)
- Discuss goals of the student group for the upcoming year. Be sure to review long term goals established by past administrations. Discuss ideas for internal student group development.
- Discuss ideas for external programs (i.e. events and activities). Discuss budget for following year (pending SU allocation, if applicable). Establish dates for follow through. (i.e. create a time-line)
- Discuss possible appointments of committee leadership.

