



Sample Transition Meeting Agenda

This transition meeting agenda assumes that all outgoing and incoming officers will meet as a group, and then break off into position-specific one-on-ones. The agenda can be split between two meetings, or adapted for other formats.

Welcome and Introductions

- Consider using an icebreaker or “get to know you” activity if everyone doesn’t already know each other.
- Review the purpose of the meeting – to support the success of the new officers and of the organization.

The Year in Review

- Using the Executive Board Transition Worksheet, review the organization’s goals from the past year, accomplishments, and challenges.
- Provide an overview of the organization’s finances, including typical or expected expenses, revenue, etc.
- Does the organization have the right number of members? Are members engaged?
- Do the organization’s activities benefit its members? Does the organization benefit the campus and local community?
- What is the organization’s reputation on campus?

Looking Forward

- Discuss the organization’s current meeting schedule. Is it working well? What should be changed?
- Review major events and develop a calendar for the coming year.
- What resources are vital to the organization’s success moving forward? What new resources should be pursued?

Outgoing/Incoming Officer One-on-Ones

- Review and discuss the Outgoing Officer Reflection Worksheet and Incoming Officer Goals Worksheet.
- How does the constitution and/or bylaws describe the position?
- What are the major duties and responsibilities of the position?
- When do specific tasks need to be completed? What needs to be done immediately? What needs to be completed over the summer?
- How does this position work with the organization’s advisor(s)? How should it in the future?
- What advisors, campus partners, or other contacts should the new officer meet with?
- Are there any ongoing or unfinished projects related to this position?

For assistance and coaching, contact engagement@tntech.edu.