



SAMPLE OFFICER TRANSITION MEETING AGENDA

OUTGOING OFFICER:

INCOMING OFFICER:

TITLE/POSITION:

SHARING OF KNOWLEDGE

What were the greatest successes of the outgoing officer's term?

What opportunities are there for continued improvement in this role?

What barriers to success may the incoming officer encounter?

Who is important to know and build relationships with in this role?

What were the greatest lessons learned by the outgoing officer? (See 10 Things I Wish I Knew worksheet)

What is one thing the outgoing officer wishes they had accomplished but were unable to?

TRANSFER OF INFORMATION

Outgoing officer shares relevant login information for accounts

Outgoing officer shares officer binder, access to electronic documents, etc.

Outgoing officer lists all projects, events, initiatives etc. completed during their term

Outgoing officer updates incoming officer on the status of responsibilities, plans, communication etc. and where the incoming officer will pick up.

What training resources are available?

FIRST 30 DAYS

Outgoing and incoming officers identify next steps for incoming officer (deadlines, resources, etc.)

What should the incoming officer's top three priorities be?

What are reasonable indicators of success for the incoming officer's first month?

