## SAMPLE OFFICER TRANSITION MEETING AGENDA

<table>
<thead>
<tr>
<th>OUTGOING OFFICER:</th>
<th>INCOMING OFFICER:</th>
<th>TITLE/POSITION:</th>
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### 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?