Officer Transition Agenda

I. Welcome and Introductions

II. The Year in Review
   A. Goals: Review the group’s goals for the previous year.
      • What did we hope to accomplish? How well did we do on each goal?
      • Which goals should be carried on this year?
      • Which goals need to be changed?
      • Which goals are no longer feasible?
   B. Programs and Activities: Evaluate what your group did.
      • How effective were the programs / activities we sponsored?
      • Did we have a good balance in our schedule of programs and activities?
      • Were our programs and activities consistent with our goals?
      • Which activities and programs do we want to repeat?
   C. Membership:
      • Evaluate number of members and their commitment
      • Do we have too many, too few, or just the right number of members?
      • Were our recruitment efforts successful?
      • Are our members as actively involved as we want them to be?
      • Were the chances for members to get involved in a meaningful way?
   D. Officers and Organizational Structure: Evaluate officers and structure.
      • Are officer roles and responsibilities clearly described?
      • Did officers work as a team, or is there more teamwork needed? Is the time and effort required in each office comparable?
      • Is there two-way communication between officers and members?
      • How do the members feel about the officers?
   E. Organizational Operations: Evaluate finances, communication, etc.
      • Were the finances adequate for our group, and managed properly?
      • Were meetings run effectively?
      • Was their frequency adequate?
      • Did the committee structure work?
      • Did we have scheduling conflicts with other groups or activities?
F. Advisor Involvement: Evaluate both quality and quantity.
   • Did our advisor provide the support we needed?
   • Did we give our advisors and other faculty a chance to get involved?
   • How could we improve faculty involvement?

G. Public Image: Evaluate how other groups perceive you
   • How do we see ourselves?
   • Is this how non-members see us?
   • How can we enhance our image?

III. Your Legacy to the New Officer Team

A. What are the current strengths and weaknesses of the group?
B. What is the best advice you can give your successor?
C. What were there major challenges and accomplishments in your term?

IV. Teambuilder Time!

V. Officer Transition

   Have the new and outgoing officers meet individually to discuss:
   A. Responsibilities of the position, with a job description if possible.
   B. A timetable for completion of annual duties.
   C. Unfinished projects.
   D. Important contacts and resource persons.
   E. Mistakes that could have been avoided.
   F. Advice for the new officer.
   G. Any questions the new officer may have.
   H. Where the outgoing officer can be reached with future questions.

VI. Wrap-Up