Transition Meeting Agenda

- **Examine/Review - Constitution, Mission Statement, Bylaws, & Policies**
  - Ensure that incoming officer understands each document
  - Discuss potential areas for change
  - Develop a plan/timeline to bring forth changes to organization members
  - Establish changes prior to re-registration
  - New officer should have a digital copy of all documents to be used during the online registration process

- **Discuss Organization Finances/Budget**
  - Review current year expenses
  - Develop a budget for upcoming year
  - Ensure all outstanding expenses are paid
  - Change signature cards with bank account [if necessary]

- **Review Organization History**
  - Past agendas
  - Meeting minutes
  - Status reports for current/on-going projects
  - Program evaluations
  - Calendars/Timelines
  - Job descriptions
  - Forward all pertinent e-mail correspondence

- **Passwords & Login information**
  - RSO Registration
  - E-mail [if applicable]

- **Contact Information**
  - Advisor
  - Member list
  - On-Campus contacts [Helmsman, UC scheduling, etc]
  - Contacts for outside members [businesses, mentors, etc]

- **Discuss Transition Questionnaires**
  - Incoming Officer
  - Outgoing Officer

- **On-Going Job Shadowing**
  - Outgoing officers should include incoming officers on RSO operations prior to leaving office

- **RSO Workshop**
  - Incoming officers should plan to attend [or send representation from the organization] to the mandatory RSO Workshop at the beginning of the semester to maintain RSO status