

ONE-ON-ONE MEETING CHECKLIST

Make this meeting as comfortable and relaxing as possible. Do not breeze through this information. **TAKE YOUR TIME.** Remember that, after serving for a full year, you are very familiar with this information and the responsibilities of this office. But it is all new to the incoming officer. Take time to explain this information and go over everything on the checklist. The deadline for this meeting is XX-XX.

- _____ Give your cleaned out, organized notebook to the new officer and explain the contents.
- _____ Explain the duties and responsibilities of the office.
- _____ Explain the duties that go along with the office that are not in the officer's description.
- _____ Review the past year's calendar and explain programs and events.
- _____ Read through the Constitution and Bylaws.
- _____ Explain forms and files that have been started over the past year.
- _____ Review historical files.
- _____ Review the officer's budget (**if you don't know what it is, meet with the Treasurer before you have your first one-on-one**).
- _____ Check supplies and materials that this officer requires. Explain to the officer where the supplies are stored and how to get more.
- _____ Together, brainstorm some goals for this office.
- _____ Discuss the timeline and deadlines for this office and the importance of meeting deadlines for events/forms.
- _____ Set a date and time for the second one-on-one meeting.

Date Completed

Outgoing Officer's Signature

Incoming Officer's Signature

SECOND ONE-ON-ONE MEETING CHECKLIST

After the new officer has had a week to soak in the information and to write down some pertinent questions, set up your **SECOND ONE-ON-ONE MEETING**. The deadline for this meeting is XX-XX.

- _____ Review goals from the previous year.
 - * Which goals are completed?
 - * Which goals need follow-up?
- _____ Set objectives for the new goals.
- _____ Set a timeline for objective completion.
- _____ Discuss the role of the advisor for this officer.
- _____ Set a time to meet and check with each other during the first month in office.
- _____ Set a time for the outgoing officer to introduce the new officer to key resource people on campus.
- _____ **Answer all of the new officer's questions!**
(Please list questions and responses.)

Date Completed

Outgoing Officer's Signature

Incoming Officer's Signature

Advisor's Signature