



OMICRON DELTA KAPPA

The National Leadership Honor Society

Transition Checklist for Circle Advisors and Coordinators

When a circle advisor or circle coordinator is planning to transition away from their duties with their circle, it is vital that they communicate with their replacement, or leave a transition document to be referenced later. One of the key indicators in the ongoing health of a circle is the presence of an engaged and active advisor and coordinator. When an advisor or coordinator departs, it is easy for a lot of institutional knowledge and organizational momentum to leave as well.

To that end, Omicron Delta Kappa asks that the following items be formally transitioned, ideally through both a transition meeting and a written document, when an advisor or coordinator leaves their role. If a meeting is not possible, please provide everything in writing.

- Circle constitution, by-laws, policies and procedures
- Contact list of currently enrolled/engaged members (student, faculty/staff, honoris causa, alumni)
 - Include information on any members who are committee chairs or hold other non-officer leadership roles
- Contact list for current or incoming student officers
- Copies of any agendas and minutes for meetings for the current school year
- Contact list for anyone on campus the circle engages with regularly
 - This can include reservation staff for facilities, student life/engagement staff for event protocols and student organization funding, registrar's office for procuring lists of qualified students for potential membership, points of contact for sending out emails to qualified students (IT staff, for example)
- Budget documents and access to any financial information (bank account, student organization fund balance, etc.)
- Detailed plans for any upcoming circle events and meetings
- Detailed plans for any upcoming initiation ceremonies
- Login information for any generic circle email accounts, websites, social media platforms, online document storage (Dropbox, Microsoft Teams, Google Drive, etc.)
- Inventory list and locations (circle swag, induction ceremony items, event materials, etc.)
- Yearly planning calendar (what typically gets completed, and when?)

- Any additional information or advice the new advisor/coordinator should know to be successful!

Other to-do items

- Notify your circle officers (students, faculty/staff, alumni advisors) as soon as possible to aid in/ease the transition process
- Notify the members of your circle
- Notify your ODK Headquarters Circle Contact 60 days prior to departing the role (**or, as soon as possible once you know you are leaving**)
 - If you are unsure of who your Circle Contact is, look on your Circle Administration Page or email odknhdq@odk.org
 - Encourage your replacement to set up a meeting with their Circle Contact for introductions and assistance with transitioning into the role
- If you are unsure of who your replacement will be, please let your Circle Contact know who the person is who will make that decision, or be sure the decision maker knows to contact ODK Headquarters when a replacement is hired/chosen
- Share the [ODK Circle Advisor Agreement](#) form with your replacement, if possible
- Notify your student organizations office on campus of the advisor change for their records