



# OMICRON DELTA KAPPA

The National Leadership Honor Society

## Transition Process for Student Officers

Omicron Delta Kappa requires circles to have, at minimum, two student officers: a president and a vice president. A treasurer is also required, but this role may be filled by a student officer or one of the advisors, depending on university rules regarding handling finances. In addition to those roles, many circles often add additional student officer roles as the circle grows and leadership is required in new areas.

While advisors tend to remain in place for longer terms and provide continuity to the circle operations, student officer roles tend to be much less permanent. This makes the need for a careful and thorough transition process even more important to preserving healthy and successful circle operations.

Because every circle may have a different makeup of circle officers and programming, it would be incredibly challenging to create a transition guidebook that is all-encompassing of the list of student officer responsibilities. This guide should instead serve as a start for circles to create their own specific transition checklist and processes.

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 student officers are transitioning out of their current roles. If a meeting is not possible, please provide everything in writing.

Ideally, all of this information should be stored in a shared electronic drive, though binders/paper copies are common as part of the transition process as well.

- Circle constitution, by-laws, policies and procedures
- Contact information for the advisors (circle coordinator, faculty advisor, alumni advisor, and/or circle assistant)
- Contact information for the circle's assigned Circle Contact at OΔK National Headquarters
- Contact list of currently enrolled/engaged members (student, faculty/staff, honorary, alumni)
  - Include information on any members who are committee chairs or hold other non-officer leadership roles
- Any contact lists available for alumni, or members who live in the local area

- ❑ 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)
  - Be sure to include how that person assists the circle and why they are on the list
- ❑ Budget documents and access to any financial information (bank account, student organization fund balance, etc.)
  - Be sure that officers (and advisors) document all procedures needed to transition checking accounts over to new signatories, and begin these processes in a timely manner prior to transition of officers. **OΔK National Headquarters does not have access to this information and cannot help transition private bank accounts to new officers**
- ❑ 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 and operations calendar (what typically gets completed, and when?)
- ❑ Information on the circle's Signature Leadership and Signature Service Programs
- ❑ Progress toward meeting [Circle Standards](#)
- ❑ Any information needed to complete the [Circle Annual Report](#)
  - The CAR becomes available for entries in April and closes at the end of June.
  - It is strongly recommended that if new officers are elected in the spring, that the CAR is completed while the current officers are in place, as they will have the knowledge needed of that year's circle activities to complete the report.
  - If the report is not available for entry yet, your Circle Contact can provide you with a PDF of the questions
  - Include the new officers in the process for compiling information and completing the CAR if possible - this will give them a head start on next year's process

**Other steps to be completed:**

- ❑ Notify your student organizations office on campus of the student officer changes for their records
- ❑ The president, VP and treasurer must complete the [Student Officer Update Form](#) to update records at OΔK National Headquarters.