Student Organization Advisor Transition Guide

2025

This document will help guide your outgoing and incoming officers through the transition of leadership.

Included in this document:

- **Advisor To-Do List**
  - Use this checklist to ensure all loose ends are tied up before you vacate your position.
- **Transition Meeting Outline**
  - Use this meeting outline to guide a conversation between outgoing and incoming leaders.

Advisor To-Do List

In addition to gathering information for the new officers, the advisor should ensure loose ends are tied up and information is effectively communicated through the transition. Please check this list to ensure all necessary items have been completed.

Schedule a meeting with both incoming and outgoing officers. Use the attached Officer Transition Meeting Outline to help run a productive meeting.

1. **Ensure your organization has finished their recognition.** Visit the Student Programs and Involvement website to learn more about the registration timeline & requirements. Missing the priority deadline to register could result in a loss of room reservations, ability to participate in Activities Carnival, and access to other resources.
2. **Communicate with the incoming officers.** Make sure you have the list of new officers. Be sure to get the officers' names, position titles, contact phone number, and K-State email.
3. **Finish all necessary correspondence** (letters, e-mail, phone calls).
4. **Make sure all important historical documents, such as contracts, constitutions, and by-laws are accessible to new organization leadership.**
5. **Ensure all bills, invoices, and outstanding balances have been properly completed and processed, and all necessary payments have been made**. Make sure your officers complete what needs to be done and ensure that you/new financial officers have access to any bank accounts utilized by the organization.

Advisor Transition Meeting Outline

Before the newly-elected officers of your organization officially assume their responsibilities, it can be helpful to host a meeting with the old and new officers. Transition meetings provide continuity and continued growth for the organization while allowing the new officers to learn from the experiences of the outgoing officers. The following outline can help make the transition meeting flow as smoothly as possible. It is adaptable to meet with either one group (outgoing or incoming).

I. Welcome and Introductions

A. Help participants get acquainted (consider an icebreaker activity)
B. Explain the purpose and goals of the meeting

II. The Year in Review

A. Goals: Review the group's goals for the previous year.
   a. What did we hope to accomplish?
   b. How well did we do on each goal?
   c. What goals should be continued this year?
   d. What goals need to be changed?
   e. What goals are no longer feasible?
B. Programs and Activities: Evaluate what your group did
   a. How effective were the programs / activities we sponsored? How did we measure their effectiveness?
   b. Did we have a good balance in our schedule of programs and activities? Were our programs and activities consistent with our goals?
   c. What activities and programs do we want to repeat?
C. Membership: Evaluate number of members and their commitment.
   a. Do we have too many, too few, or just the right amount of members?
   b. What actions did we take to recruit members? Were our recruitment efforts successful?
   c. Are our members as actively involved as we want them to be?
   d. What were the opportunities for members to get involved in a meaningful way?
D. Officers and Organizational Structure: Evaluate officers and structure.
   a. Are officer roles and responsibilities clearly described? How?
   b. Did officers work as a team, or is there more teamwork needed? If so, what contributed to that dynamic?
   c. Is the time and effort required in each position comparable?
   d. Is there two-way communication between officers and members? How do the members feel about the officers?
E. Organizational Operations: Evaluate finances, communication, etc.
   a. Were the finances adequate for our group and managed properly?
   b. Were meetings run effectively? Was their frequency adequate?
   c. Did the committee structure work?
   d. Did we have scheduling conflicts with other groups or activities?
F. Advisor Involvement: Evaluate both quality and quantity.
   a. Did our advisor provide the support we needed?
   b. Did we give our advisors and other faculty a chance to get involved?
   c. How could we improve faculty and advisor involvement?
G. Public Image: Evaluate how other groups perceive you.
   a. How do we see ourselves?
   b. Is this how "outsiders" see us?

c. 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. Officer Transition

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

V. Wrap-Up

A. "Pass the torch" in a semi-official ceremony in front of outgoing and incoming board and wish everyone luck!
B. Provide an opportunity for informal socializing.

Adapted from: The Wichita State University Student Organizations' Handbook (1992-1993)