



Officer Roles, Responsibilities, and Transitions

Officer Refresher

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Officer Responsibilities | What is your job?

- | | | |
|---|------------------------------------|--|
| <input type="checkbox"/> President | <input type="checkbox"/> Secretary | <input type="checkbox"/> Advisor |
| <input type="checkbox"/> Vice President | <input type="checkbox"/> Treasurer | <input type="checkbox"/> Committee Chair |

President

- A. Runs the _____ in an orderly fashion.
- B. Follow up with _____ and committee _____ on their responsibilities
- C. Ensures that all activities are _____ with school policies, philosophies, and procedures
- D. Set a _____ tone for the organization
- E. Be the _____ and _____ for the group

Vice-President

- A. Run meetings in the _____ of the president
- B. Serve as an ex-officio member of all standing _____
- C. Oversee membership _____ and _____
- D. Help the _____ shape the vision for the organization

Secretary

- A. Record _____ and _____ at meetings

- B. Distribute copies of weekly meeting _____ to all members & Advisor after the meeting concludes [*Minutes Template available at <https://bit.ly/2XQZ068>*]
- C. Report on the organization's _____ to campus, _____, and national leaders
- D. Keep the membership _____, including _____ information up-to-date

Treasurer

- A. Receive all _____, collect dues and issue receipts, as applicable
- B. Promptly pay all _____ obligations, as applicable
- C. Maintain up-to-date _____ records of the organization, give a financial report at each regular meeting, and provide an _____ report at the close of their term
- D. Oversee _____ efforts

Advisor

- A. Attend meetings and events but _____ run them
- B. Give ideas and _____ about programs, projects, and the direction of the organization
- C. Allow the students to _____
- D. Manage the _____ Board
 - 1. Ensures that all activities are _____ with school policies, philosophies, and procedures
 - 2. Be a _____!
 - 3. Encourage all _____ to be involved and engaged.

Committee Chairs

- A. _____ members for the committee
- B. _____ committee meetings

C. _____ on committee activities

Committee Chairs | Sample Positions

- Alumni Relations
- Community Outreach
- Community Service
- Concerts
- Events
- Finance and Budget
- Homecoming
- Recruitment & Retention
- Operations
- Public Relations
- Welcome Week

Officer Responsibilities

Review the _____ documents of your organization (Constitution, By-laws, Standing Rules, etc.) to provide further insight on officer, advisor, committee chair, and member responsibilities.

For more ideas: Student Government <https://bit.ly/2M6u8fd>, Greek Life: <https://bit.ly/36fgAF8>, Programming Board: <https://bit.ly/2KQE4cf>

Running Meetings | Basic Agenda

- I. **Call to** _____ – Start of the meeting
- II. _____ – The number that must be present to hold a meeting
- III. **Reading of the** _____ – Record of the previous meeting
- IV. _____ **Reports** – Officers report on their activities, concerns, needs, etc.
- V. _____ **Reports** – Committees report on their activities, concerns, needs, etc.
- VI. _____ **Business** – Items left over from previous meetings
- VII. _____ **Business** – New items for consideration
- VIII. _____ – Information for the benefit of the organization
- IX. _____ – End of the meeting

Parliamentary Procedure | Basics

Robert’s Rules of Order, Newly Revised is typically defined as the resource for anything not covered in the governing documents.

Members can:

1. Present motions: “ _____.”
2. Second motions: “ _____.”
3. Debate motions: “ _____”
4. Vote on motions: “ _____ / _____ / _____” (or “Yes/No/Meh”)

Motions are how things get done!

Parliamentary Procedure | Proposals

To get a _____ on the floor:

1. The chair recognizes the speaker.
2. The speaker says, “I move.”
3. The chair calls for a second.
4. Someone says, “I second.”
5. The chair calls for discussion.
6. The motion is discussed.
7. The chair calls for a vote.

Parliamentary Procedure | Tips

1. A motion should be made before _____ of a topic.
2. Only _____ motion can be considered at a time.
3. The person making the motion gets to _____ about it first, then the person who made the _____.
4. Motions can be _____ if members want to make changes to it. Amendments are done the same way as motions. Once a motion is amended, you can only talk about that part of the motion.
5. Amendments to the motion must be _____ on before going back to the main motion. If the amendment is _____, then it becomes part of the main motion. If _____, then you go back to the original, main motion.
6. After all of the discussion, take a vote: usually a _____ vote passes the motion.

7. There are three common ways to move to a _____:
 - a. By _____ consent
 - b. By seeing no _____ discussion, the Chair calls for a vote
 - c. By _____ debate
 - i. “_____ the question”: requires there to be no objection to ending debate. If there is a single objection, debate must continue.
 - ii. “_____ the previous question”: requires a second, there is no debate on the motion, and takes a 2/3 majority to approve.

Virtual Meetings & Events

- A. Check all the _____ before you start:
 1. Run an _____ check – is there an echo?
 2. If using a _____, test it. You may have to click the cursor on the first slide for the platform to advance the power point.
 3. Use an _____ cable for better internet connection.
- B. Provide an emergency contact _____ for people to call if they cannot access the meeting. [Many platforms provide a call-in number]
- C. _____ the session so members who could not attend live can watch it later – even after you go back to in-person meetings.
- D. Suggest everyone keep their _____ on for accountability and personal connection.
- E. Start the _____ by asking each person how they are doing and to find out what’s new.

Effective Officer Transitions

1. Writing effective _____ is of value to every organization. They should include:
 - a. Time the meeting began and ended.
 - b. Summary of events during the meeting.

- c. Exact detail of actions taken, including motions.
 - d. Who was in attendance at the meeting.
 - e. Future plans, programs, and activities.
2. Create a _____, using tabbed dividers.
 - a. _____.
 - b. Sample _____.
 - c. Sample _____.
 - d. _____ of the year's activities.
 - e. Who to _____.
 3. Meet with your _____. Give them the ins and outs, the good and the bad, goals accomplished and what is still left to do. And get their _____ info! [Email, phone, social media, etc.]
 4. Give a copy of all materials to the _____. When I was Circle K District Administrator, we found that 20-25% of the new officers elected in the spring either didn't _____ in the fall or just fell of the _____. Those resources and materials may be lost in those cases.
 5. Be focused and _____ with your transition and you will ensure the continued _____ of your club or organization. ***This is your legacy!***

Planning Your Own Leadership Retreat

- A. Determine if you are going to do it _____ or _____.
If in-person, where are you going to hold it?
- B. Review the roles and responsibilities of each _____.
- C. Do a _____ session for the organization, the executive board, and each position.
- D. Have _____ to allow people to interact and get to know each other. Gently nudge them from their comfort zone.
- E. Pass on _____, _____, _____, _____, etc.
- F. Have strong _____ but make the learning _____!