



Officer Roles, Responsibilities, and Transitions

APCA Pivot Your Programs | August 31, 2023

Dave Kelly | America's Student Leadership Trainersm

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/2XQZo68>*]

- 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

- A. **Call to** _____ – Start of the meeting
- B. _____ – The number that must be present to hold a meeting
- C. **Reading of the** _____ – Record of the previous meeting
- D. _____ **Reports** – Officers report on their activities, concerns, needs, etc.
- E. _____ **Reports** – Committees report on their activities, concerns, needs, etc.
- F. _____ **Business** – Items left over from previous meetings
- G. _____ **Business** – New items for consideration
- H. _____ – Information for the benefit of the organization
- I. _____ – End of the meeting

Engaging Members in the Projects and Activities of the Club/Organization

Officers need to know how to _____ their members.

- A. Identify the _____ and what you are trying to accomplish.
- B. Determine _____ you want to motivate.
- C. Find that person’s _____.

D. _____ that person for what you want: Never fear _____!

Effective Officer Transitions

- A. Writing effective _____ is of value to every organization. They should include:
 - 1. Time the meeting began and ended.
 - 2. Summary of events during the meeting.
 - 3. Exact detail of actions taken, including motions.
 - 4. Who was in attendance at the meeting.
 - 5. Future plans, programs, and activities.
- B. Create a _____, using tabbed dividers.
 - 1. _____.
 - 2. Sample _____.
 - 3. Sample _____.
 - 4. _____ of the year’s activities.
 - 5. Who to _____.
- C. 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.]
- D. 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.
- E. 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 _____!