



Succeeding as a Club/Organization Officer and Effective Transitions

Leadership Webinar | September 26, 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

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

Vice-President

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

Secretary

- Record _____ and _____ at meetings
- 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>

Dealing with Conflict and Drama: Dave's 5 Concepts

- If you have a conflict with someone and you do not take it _____ that _____, then it can't be _____.
- Deal with conflict _____-on-_____: _____ in public, _____ in private.
- Use the three _____ system: _____, _____, _____.
- Learn to _____ the _____ from the _____.
- Confront the _____ with a _____.

Running Meetings | Basic Agenda

- Call to** _____ – Start of the meeting
- _____ – The number that must be present to hold a meeting
- Presentation of the** _____ – Record of the previous meeting
- _____ **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

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:

- A. Present motions: “ _____.”
- B. Second motions: “ _____.”
- C. Debate motions: “ _____”
- D. Vote on motions: “ _____ / _____ / _____” (or “Yes/No/Meh”)

Motions are how things get done!

Parliamentary Procedure | Proposals

To get a _____ on the floor:

- A. The chair recognizes the speaker.
- B. The speaker says, “I move.”
- C. The chair calls for a second.
- D. Someone says, “I second.”
- E. The chair calls for discussion.
- F. The motion is discussed.
- G. The chair calls for a vote.

Parliamentary Procedure | Tips

- A. A motion should be made before _____ of a topic.
- B. Only _____ motion can be considered at a time.

- C. The person making the motion gets to _____ about it first, then the person who made the _____ may be called on next, then open to all.
- D. 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.
- E. 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.
- F. After all of the discussion, take a vote: usually a _____ vote passes the motion.
- G. There are three common ways to move to a _____:
 - 1. By _____ consent
 - 2. By seeing no _____ discussion, the Chair calls for a vote
 - 3. By _____ debate
 - a. “_____ the question”: requires there to be no objection to ending debate. If there is a single objection, debate must continue.
 - b. “_____ the previous question”: requires a second, there is no debate on the motion, and takes a 2/3 majority to approve.

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 _____!