



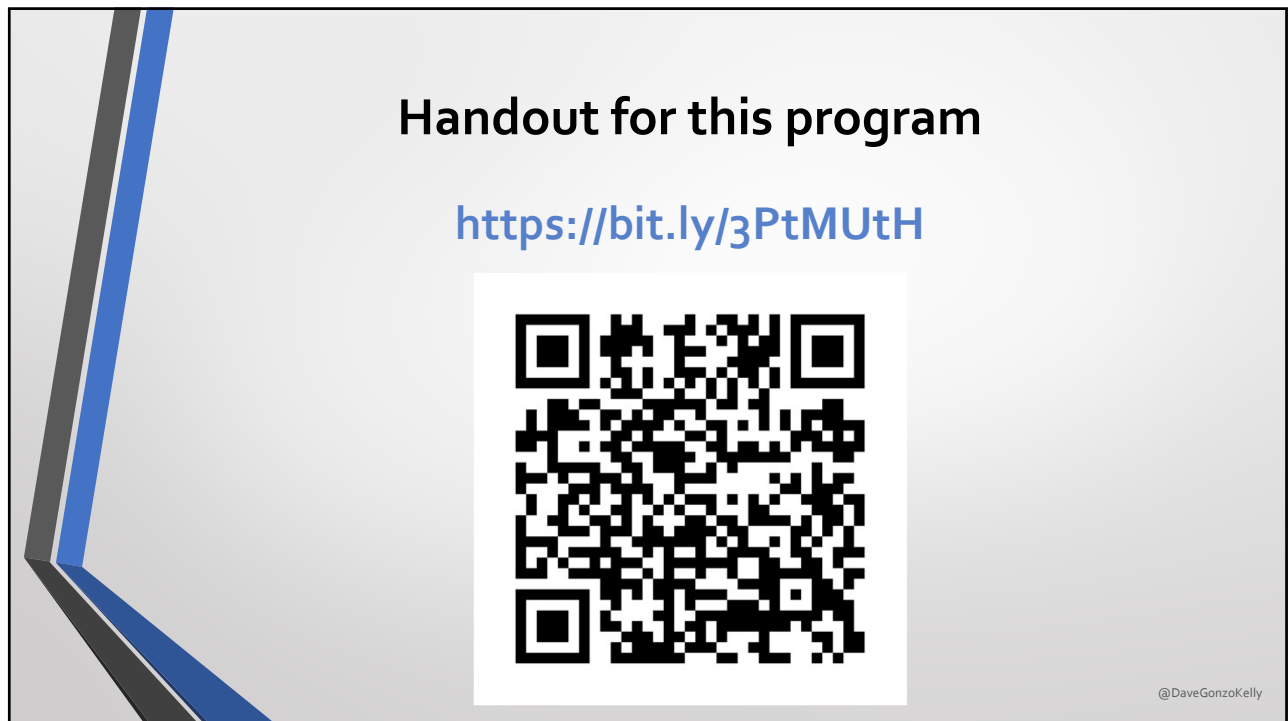
FREE WEBINAR!

**Succeeding as a Club/
Organization Officer &
Effective Transitions**

**Tuesday, 9/26/2023
2 -3 pm Eastern Time**


Presented by
Dave Kelly,
The Student Leadership TrainerSM

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Handout for this program

<https://bit.ly/3PtMUtH>



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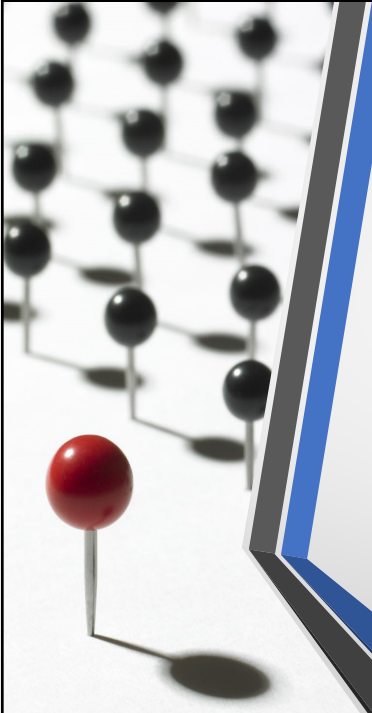
Officer Responsibilities

What positions do most clubs and organizations have?

- President
- Vice President
- Secretary
- Treasurer
- Advisor
- Committee Chair

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President

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

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Vice President

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

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Secretary

- A. Record **minutes** and **attendance** at meetings
- B. Distribute copies of weekly meeting **minutes** to all members & Advisor after the meeting concludes
- C. Report on the organization's **activities** to campus, **state**, and national leaders
- D. Keep the membership **roster**, including **contact** information, up-to-date

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Treasurer

- Receive all **payments**, collect dues and issue receipts, as applicable
- Promptly pay all **financial** obligations, as applicable
- Maintain up-to-date **financial** records of the organization, give a financial report at each regular meeting, and provide an **annual** report at the close of their term
- Oversee **fundraising** efforts

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Advisor

- Attend meetings and events but **don't** run them
- Give ideas and **suggestions** about programs, projects, and the direction of the organization
- Allow the students to **make mistakes**
- Manage the **Executive** Board
 - Ensures that all activities are **consistent** with school policies, philosophies and procedures
 - Be a **cheerleader!**
 - Encourage all **members** to be involved and engaged.

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Committee Chairs

- A. **Recruit** members for the committee
- B. **Run** committee meetings
- C. **Report** on committee activities

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Committee Chairs | Sample Positions

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

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Officer Responsibilities

Review the **governing** 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>

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Dave's Five Concepts to resolve conflict and have difficult conversations

1. If you have a conflict with someone and you do not take it **to** that **person**, then it can't be **very significant**.
2. Deal with conflict **one-on-one**: **praise** in public, **criticize** in private.



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Dave's Five Concepts to resolve conflict and have difficult conversations

3. Use the three **C's** system: **compliment, criticize, compliment.**
4. Learn to **separate** the **person** from the **position.**
5. Confront the **situation** with a **direct question.**



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Running Meetings | Basic Agenda

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

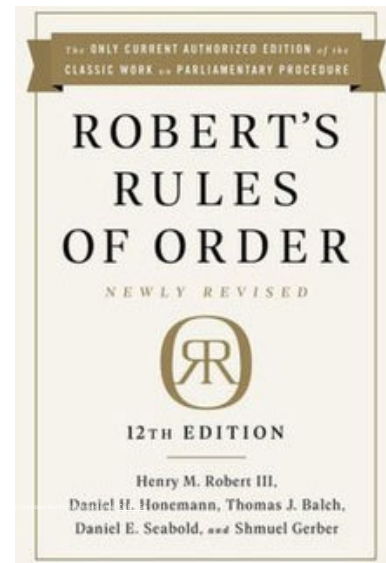


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Meetings

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



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Parliamentary Procedure | Basics

Members can:

- A. Present motions: "I move."
- B. Second motions: "I second."
- C. Debate motions: "I think..."
- D. Vote on motions: "Aye/Nay/Abstain" (or "Yes/No/Meh")

Motions are how things get done!



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Parliamentary Procedure | Proposals

To get a **proposal** 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.



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Parliamentary Procedure | Tips

- A. A motion should be made before **discussion** of a topic.
- B. Only **one** motion can be considered at a time.
- C. The person making the motion gets to **talk** about it first, then the person who made the **second may** be called on next, then open to all.
- D. Motions can be **amended** 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.



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Parliamentary Procedure | Tips

- E. Amendments to the motion must be **voted** on before going back to the main motion. If the amendment is **passed**, then it becomes part of the main motion. If **defeated**, then you go back to the original, main motion.
- F. After all of the discussion, take a vote: usually a **majority** vote passes the motion.



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Parliamentary Procedure | Tips

- G. There are three common ways to move to a **vote**:
1. By **unanimous** consent
 2. By seeing no **further** discussion, the Chair calls for a vote
 3. By **ending** debate:
 - a. "**Calling** the question": requires there to be no objection to ending debate. If there is even a single objection, debate must continue.
 - b. "**Moving** the previous question": requires a second, there is no debate on the motion, and takes a 2/3 majority to approve



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

Officers need to know how to **motivate** their members.

- A. Identify the **goal** and what you are trying to accomplish.
- B. Determine **who** you want to motivate.
- C. Find that person's **hot buttons**.
- D. **Ask** that person for what you want:
Never fear **NO!**



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Your Turn!!




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Share either:

one great idea or
one thing you
really need help
with



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Effective Officer Transitions

A. Writing effective **minutes** is of value to every organization. [QR code with template on next slide, open your camera to access]

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.

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Effective Officer Transitions Template for Meeting Minutes



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Effective Officer Transitions


B. Create a **notebook binder**, using tabbed dividers.

1. **By-laws**.
2. Sample **meeting agendas**.
3. Sample **budget**.
4. **Calendar** of the year's activities.
5. Who to **contact**.

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Effective Officer Transitions

- C. Meet with your **successors**. Give them the ins and outs, the good and the bad, goals accomplished and what is still left to do. And get their **contact** info! [Email, phone, social media, etc.]
- D. Give a copy of all materials used in transition to the **advisor**. When I was Circle K District Administrator, we found that 20-25% of the new officers elected in the spring either didn't **return** in the fall or just fell off the **grid**. Those materials and resources may be lost in those cases.
- E. Be focused and **intentional** with your transition and you will ensure the continued **health** of your club or organization!

This is your **legacy!**

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THE VIRTUAL COLLABORATIVE SGA & STUDENT LEADERSHIP RETREAT



**Saturday, October 28, 2023
9:30 am – 1:30 pm EDT**

Registration is \$1,250 – No limit on number of students or advisors that can participate

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America's Student Leadership Trainersm

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Saturday,
October 28, 2023,
9:30 am – 1:30 pm,
Eastern Time

Bring all of your
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and advisors for
one, low price of
\$1,250 all inclusive.



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Planning Your Own Transition Leadership Retreat

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

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