



SOUTHEAST

Office of Campus Life

INTENT TO ORGANIZE

Instructional Packet for New Groups

The Intent to Organize Packet has many helpful tools to assist you as you build your organization to assist you as you build your organization. The packet contains information on:

- ❖ Starting As a Leader
- ❖ Your Role as a Student Leader
- ❖ How to Find an Advisor
- ❖ The Student Group Advisor Relationship
- ❖ Advisor Role
- ❖ Organizational Profile
- ❖ Organizational goal Setting
- ❖ Running Effective Meetings
- ❖ How to Write Effective Minutes
- ❖ How to Write a Constitution and Bylaws
- ❖ Planning a Group Retreat
- ❖ Membership Development
- ❖ Leadership Development Plans

Criteria for Membership of Student Groups

- ❖ Have at least 51% of membership enrolled at Indiana University Southeast
- ❖ Have a minimum of five (5) students
- ❖ Have an Advisor who is a full-time employee of Indiana University Southeast
- ❖ Have officers who are currently enrolled at Indiana University Southeast

Groups must complete each stage in this process in order to become a fully registered group at Indiana University Southeast. Each month the Associate Director for Campus Life will meet with the group's leadership to review progress that has been made toward building the group. In the next ninety (90) days the group will:

- ❖ Hold recruitment and organizational development meetings
- ❖ Write a constitution and bylaws
- ❖ Secure an advisor and complete the Advising Agreement
- ❖ Hold elections of appointed officers
- ❖ Hold an organizational retreat and have an officer's training workshop
- ❖ Turn in a roster of members

When this process has been completed the officers and advisor will meet with the Associate Director of Campus Life to evaluate the materials and formally register the group if everything is in order. At that time, the advisor and the President will receive the student group manual.

As a registered student group at Indiana University Southeast, your group will have access to meeting facilities, event planning assistance, audio/video equipment, information posting opportunities, student information, leadership resources, and organizational and personal development workshops.

Indiana University Southeast provides services and facilities only to registered student groups. Registration should not be construed as endorsement sponsorship, or approval of the group's programs, activities, policies, actions, and /or operations.

If there are any questions during this time, the groups and its advisor are encouraged to contact the Associate Director of Campus Life at 812-941-2316.

Starting As a Leader

Congratulations! You've just been elected as a student leader; you're feeling great and, at times, a bit scared, right? You've finally received the position that you've wanted for so long, and perhaps you're experiencing a little bit of doubt. You want to give it your all, be the BEST officer your group ever elected. You want everything perfect the first time-with no mistakes from anybody. Nice intentions, but as we all know, highly unrealistic. People are fallible; mistakes will inevitable be made. Here is some information that will start your thinking so you can start in your new position. So, relax, get comfortable and read on!

Deciding on a Style of Leadership

The style of leadership that you choose will have a tremendous impact on your organization. You want to develop a style that your feel comfortable wit and that will motivate the members of your organization to achieve its goals. What might prove helpful is to examine the styles of previous officers. Write down what you like and dislike about the methods in which goals were and were not achieved, and why. By doing so, you can discover what you believe is important to the organization. For instance:

- ❖ Are you people-oriented (focusing mainly on HOW your members are doing) or are you task oriented (focusing on WHAT your members are doing)?
- ❖ Which is higher in our priorities-fellowship (camaraderie) or getting the job done?
- ❖ Should all members or just the officers decide organizational goals?
- ❖ Will you achieve goals by setting up different committees (social committees, recruitment committee, blood drive committee, ect.) or will you achieve goals another way?
- ❖ What would you suggest the groups goals are?

Ultimately you must decide which style (i.e., tell and have done, participatory, ect.) would help the organization accomplish this goal, most effectively, in each situation. Hopefully, this handout has helped you feel more prepared for your upcoming responsibilities. You can face your position as student leader with anticipation and confidence! Remember that others elected you because they believe you possessed the ability to do well. Knowing that should make believing in yourself easier. Emerson once said, "Self trust is the first secret of success." He was right. So, relax, be yourself, believe in yourself and enjoy the challenge!

If you have any questions, or would like assistance with your leadership responsibilities, please feel free to stop by the Campus Life office or call the Associate Director, Campus Life at 812-941-2316.

Organizational Profile

What is the purpose?

What are the goals?

What do we do

Do we have a special service project? What is it?

What benefits do we offer the members?

What are the membership qualifications?

Organizational Goal Setting

Many groups start an academic year with no critical look at what has been done in the last year and the impact the organization's activities have on the membership and the community it serves. At least once a year, members of a group should gather to survey what has been done in the past and assess what needs to be done to ensure the group's future. This can be done by evaluating the purpose of the organization, defining goals, and establishing action plans.

PURPOSE is broad, general statement that tells why the group exists. It is stable over time- not changing from year to year. It is usually the first statement in your group's constitution.

GOALS represent the desired future conditions that individuals or groups strive to achieve. Goals are statements describing what a group wishes to accomplish. They:

- ❖ Focus attention on actions that are relevant
- ❖ Identify areas of interest
- ❖ Guide activities by focusing attention on behaviors
- ❖ Develop commitment
- ❖ Serve as standards to assess performance
- ❖ Reduce anxiety in decision making
- ❖ Provide a basis for planning and coordination actions

Organizational goal setting is best done in a group setting so that everyone may participate. Why? Because people tend to support what they create. You can expect better commitment, more motivation, and better goals because there are more ideas and opinions in the decision process.

It is probably a good idea to bring someone in to facilitate the goal setting process. This way, there is no favoritism and the facilitator can be more objective. It also helps to have an outside facilitator to help clarify statements. It is less likely that there will be assumptions outside facilitator allows the advisor and president to participate in the brainstorming process as well.

OBJECTIVES are how a goal is going to be reached. There are four parts to an objective:

- ❖ The action (What will be done/demonstrated)
- ❖ The requirements (What are the rules)
- ❖ The degree (How many, how far, how much, how often...)
- ❖ The benchmark (How will I know if I/we did it)

Goals need to be broken down into small steps. There should be at least one objective per goal. It is OK to have more than one objective. In fact, the more you think out the steps it would take to reach your goal, the better the chance for success. Keep in mind; however that one step/objective may be a stumbling block to completing your goal. So what can you do?

When setting a goal, consider the limitations and your priorities. As you define the objectives, refer to your limitation/priorities, to make sure you do not back yourself onto a corner.

Some questions that need to be asked...and answered:

- ❖ Do I/we really want this?
- ❖ Who else is involved? Will I have their support?
- ❖ Do I have sufficient resources?
- ❖ Do I have the time?
- ❖ Am I willing to make this commitment?

If there is a “NO” answered to any of the questions the objectives need to be re-evaluated, and quite possible, the goal. Keep in mind that objectives should be measurable-they must be able to be evaluated.

PLANNING FOR ACTION is the Who,

What, Why & How.

What is to be done?

How will it be accomplished?

What are our resources in terms of people, money, and materials?

Who is responsible for completing each task?

What is the deadline?

Example:

- ❖ **Goal:** To improve membership recruitment.
- ❖ **Objective 1:** Develop a committee to be responsible for recruitment.
- ❖ **How:** Brainstorm ideas to attract members.
- ❖ **Resources:** Members, executive officer, advisor, handouts on recruitment, budget.
- ❖ **When:** By the end of the semester.

Results: *Acceptable:* Membership increase by 25-40 percent, *Unacceptable:* Membership increases by less than 25 percent. *Better than expected:* Membership increases by more than 40 percent.

Basic Steps to Goal Setting, Objectives and Action Planning;

- 1) Brainstorming the goals as a group. Give everyone the opportunity to share opinions.
- 2) Review the list that you've just brainstormed. Choose those goals that the groups wants to work on by consensus.
- 3) Prioritize the goals. Do you need to do some things before you can work on others?
- 4) Determine objectives, plan of action.
- 5) Move into action, determine what the follow through will be and who will do it.
- 6) Constantly evaluate your progress. Be flexible; allow your objectives to change to meet new circumstances.

Your Role as a Student Leader

From: "You're Role as a Student Leader"

By: Ron Lafitte: (September 1993) Campus Activities Programming

School has started. In this first month, you have already been bombarded with programs planned last year, meetings, recruitment fairs, meetings, phone calls, and more meetings. As a leader in your group, you are still enthusiastic about your position, what you are going to do, what you are going to learn, and how you can impact your campus...right? Right!

With the excitement you feel during the first month or so of school, you might accidentally overlook some simple and basic guidelines that could prevent needless headaches, heartaches, and backaches! Before you learn what some of those might be, however, your need to be clear as to what is your role with your group, as well as what is your role with respect to your advisor.

Your Role with the Executive Board

Whether you are an officer, committee chair or committee member, it is important for you to know what's going on. Read all the correspondence you get, attend the meetings you are expected to attend, return phone calls, set-and keep- office hours, and return just be informed. With all that is happening at the beginning of the year, it's important to know the details of your group and your executive board itself.

Directly related to being informed is your communication style. Regardless of whom you are, or your position, you have the ability to communicate with your fellow members. Its how you communicate that is most important. Stay abreast of all important details, and don't hesitate to ask questions. Keeping the lines of communication open at all times is vital for your role to function productively and effectively.

How well you or your executive board communicates with each other, your advisor, members, and ultimately your institution, will reflect on your group. How well you communicate/publicize your groups is a major thrust of your role as a leader.

Your Role with Your Advisor

1). By now you have worked with your advisor and should be getting glimpses of his/her philosophies, approach to you and the groups, and leadership style. If you haven't done so already, arrange a meeting with your advisor to fully discuss your role in the groups and with him/her. Find out what s/he believes his/her role to be and make sure both of you are extremely clear on your respective roles. By clarifying and understanding each other's roles, philosophies and expectations should then be clear to everyone.

2). Realize that one of your advisor's roles is that of a teacher. A lot of learning happens within the student group. The skills and abilities (negotiation, communication, leadership, time management, budget, and ect.) are learned in the "classroom" with the advisor as "teacher." At times you may not agree with the decisions made or the approach taken by your advisor. It is your responsibility to let him/her know clearly and without hesitation of your disagreement. Be clear and honest about your thoughts. Who is right and who is wrong? There is no universal right and wrong answer in most situations. Every group is completely different in programming approach, budget, and philosophy. Your group's constitution, programming philosophy, and relationship with your advisor will guide you to resolve any disagreement that may occur.

3). As the year progresses, you will come to appreciate the challenging nature of the advisor's position. There are few positions on campus that require teaching, student development and advising programs, tactfulness, entertainment, performing arts and budget skills (just to name a few!) Just as the demands of your time are many, the demands of the advisor are many too. Being aware of all that the advisor does will broaden your perception of him/her and your experience as a Student Leader.

How to Write a Constitution and By-Laws

The constitution of a groups contains the fundamental principles that govern it's operation. The bylaws establish the specific rules of guidance by which the group is to function. All but the most informal groups should have their basic structure and methods of operation in writing.

Why Have a Constitution?

By definition a groups is a "body of persons organized for some specific purpose, as a club, union, or society." The process of writing a constitution will serve to clarify your purpose, delineate your basic structure and provide the corner stone for building an effective group. It will also allow members and potential members to have a better understanding of what the groups is all about and how it functions. F you keep in mind the value of having a written document that clearly describes the basic framework of your organization, the drafting of the constitution will be a much easier and more rewarding experience.

What Should be Covered By a Constitution?

The following is an outline of the standard information to be included in a constitution. The objective is to draft a document that covers these basic topics in a clear and concise manner.

Why have Bylaws?

The constitution covers the fundamental principles but does prescribe specific procedures for operating your groups. By-laws set forth in detail the procedures your group must follow to conduct business in an orderly manner. They provide further definition to the articles of the constitution and can be changed more easily as the needs of the group change.

What Should be Included in the By-Laws?

By-laws must not contradict provisions in the constitution. They generally contain specific information on the following topics:

- a) Membership (selection requirement, resignation, expulsion, rights and duties)
- b) Dues (amount and collection procedures, any special fees, when payable)
- c) Duties of officers (powers, responsibilities, specific job descriptions, procedures for filling unexpired terms of office, removal from office)
- d) Executive Board (structure, composition, powers)
- e) Committees (standing, special, how formed)
- f) Order of Business (standard agenda for conducting meetings)

- g) Parliamentary Authority (provisions for rules of order, generally Robert’s rules of Order- Newly revised)
- h) Amendment Procedures (means of proposals, notice required, voting requirements)
- i) Other specific policies and procedures unique to your organization necessary for its operation.

<u>SAMPLE CONSTITUTIONAL OUTLINE</u>	
Title of Document:	Constitution of “Group’s Name,” Indiana University Southeast
Preamble:	A one paragraph statement of the mission of the group, telling why it was created.
Article I:	NAME
Article II:	PURPOSE
Article III:	MEMBERSHIP
Article IV:	ORGANIZATION
	Section I: Structure (Branches, executive, ect.)
	Section II: Officers
	Section III: Elections and Appointments
	Section IV: Terms of Office
	Section V: Powers (of each officer and area of structure)
	Section VI: Governing rules (refers to by-laws and Standing Rules)
Article V:	MEETINGS
Article VI:	QUORUM
Article VII:	
	Section I: Adoption and Ratification of the constitution (Explain How-What is the procedure)
	Section II: Amending the Constitution (explain How-What is the procedure)
Article VIII.	GENERAL PROVISIONS (What rules or other provisions is this constitution subjugated to. When do they take affect?)

SAMPLE BY-LAWS OUTLINE

CHAPTER I. STRUCTURE OF THE ORGANIZATION

1.0 Executive Officers

A Values Statement of the Executive Officers (what are they responsible for?)

B. Meetings (how often should they meet?)

C. Training (what training is required by Executive Officers?)

D. Duties and responsibilities of Executive Officers

I). The following duties shall be the responsibility of the President.

A) A president should not only be pleasant and firm as a presiding officer, but also should set the pace in getting the work done. S/he is non-partisan when president, seeing that the members are equal, regardless of the question of the debate. It is the responsibility of the president to:

- ❖ *Know the constitution and by-laws of the group*
- ❖ *Study the objectives and procedures of the group officio member of the committees.*
- ❖ *Determine, with the aid of the other officers and members, the objectives, meetings and action plan of the group.*

- ❖ *Analyze membership problems and help plan a vigorous membership campaign*
- ❖ *See that other group leaders, committees, members and the advisor are informed about problems and policies under consideration.*
- ❖ *Encourage the cooperation and promote harmony within campus ranks.*
- ❖ *Schedule and preside over regular meetings of the Executive Board*
- ❖ *Preside at group meetings*
- ❖ *Work closely with the group's advisor*

2. The following duties shall be the responsibility of the Vice President:

- ❖ *The vice president should work closely with the necessary for him/her to take over the position. In this role the vice president should:*
- ❖ *Assist the president, but not substitute for him/her*
- ❖ *Become acquainted with the president's plan for the year and be prepared to assume his/her duties and responsibilities*
- ❖ *Gather ideas from member*

- ❖ *Be host at meeting: check room arrangements, proper lighting, ventilation, ect. greet newcomers and see that new members get acquainted; see that new members get acquainted; see that guest speakers are properly recognized, introduced and entertained.*
- ❖ *Know what is going on; be familiar with information materials sent to the president.*

3. The following shall be duties of the Secretary (NOTE): Some large groups divide the secretarial responsibilities between a recording secretary and a corresponding secretary. A capable secretary is usually characterized by good organizational skills, word processing skills, accuracy, and promptness. The secretary's most important job is interpreting what goes on in the group. Getting at the heart of a discussion calls for alertness and good reporting. Ability to state clearly the proceedings of a meeting is essential.

The record is the source of all official statements of definite action, motions, directives, and assignments. Accurate minutes often become the umpire in debates concerning what was agreed upon. The president may rely on the secretary to remind him/her of things to be done. Committee chairs may need to be notified of their assignments. The secretary is notified of their assignments.

The secretary is expected is expected to:

- ❖ *Keep accurate account of group and executive committee proceedings and produce minutes for each meeting.*
- ❖ *Provide officers and committees with all necessary papers and materials. Keep a systematic method of filing letters received, membership rosters, lists committees, ect.*
- ❖ *Attend to official correspondence*
- ❖ *Mail and post notices of group and executive committee meetings.*
- ❖ *Prepare with the president, in advance, the order of business for each meeting.*
- ❖ *Cooperate with the treasure in keeping an accurate listing of membership status.*
- ❖ *Read minutes of meetings and call the president's attention to unfinished business.*
- ❖ *Have on hand at each meeting an agenda, minutes of previous meetings, list of committees and committee reports, a copy of the constitution and by-laws.*

4. The following shall be the duties of the Treasurer:

- ❖ *Some groups assign the treasurer as chair of finance committee. The treasurer is expected to:*
- ❖ *Obtain records of all financial documents from the previous treasurer and go over these records with him/her if possible.*
- ❖ *Maintain a simple set of books and record all items of income and expenses as they occur.*
- ❖ *Meet with the advisor to prepare the annual budget for the upcoming year.*

- ❖ Prepare requisitions for prompt payments of all invoices, deposit all money collected, and use the proper account number on all paperwork.
- ❖ Pay out funds on orders signed by the treasurer, the president, and the secretary unless otherwise provided.
- ❖ Make reports at meetings as necessary
- ❖ Cooperate with the secretary in keeping accurate membership records including names, addresses, dates paid, and funds received.

1.2 Next Branch or area defined by the constitution's structure. In many groups, the next level may be their own chairperson.

- A. Values Statement
- B. Meetings
- C. Training
- D. Duties and Responsibilities of each leader that falls into this category.

CHAPTER II. COMMITTEES

2.0. STANDING COMMITTEES/SPECIAL COMMITTEES/AD-HOC COMMITTEES

Much of the important work of a group is done through committees. Try to retain at least one person from the previous year's committee to insure continuity. Try to keep the number of standing committees to a minimum, filling any gaps with ad-hoc committees that are created for a specific project and are then dissolved. Examples of committees include the executive committee (made up of officers), the membership committee (responsible for encouraging and maintaining new membership), the program committee (which arranges the organization's yearly schedule of events), and the publicity committee (which arranges the organization's yearly schedule of events), and the publicity committee (which interprets and publicizes the policies and plans of the group).

Areas to be addressed in this section of the by-laws include:

- A. Purpose of Committees
- B. Provisions for Creation
- C. Selection/Placement
- D. Dissolution

Chapter III.

3.0 GENERAL MEETINGS

How often held? When?

3.2 QUORUM

What constitutes quorum?

3.4. VOTING

Who gets to vote?

What percentage of votes needed to be cast in favor to pass a motion?

3.6. SPECIAL MEETINGS

Who can call them?

How much notice must be given?

How will the meeting be conducted?

3.8. MEETINGS

- A. Includes: kind of meeting (regular, special, emergency); date of meeting and place; attendance, whether the minutes of the last meeting were approved or dispensed with, all main motions, including the name of the person introducing the motion.
- B. Distribution (to whom)
- C. Recording Amendments to the constitution, by-laws, or Standing Rules

3.10. ATTENDENCE

What is the attendance policy?

- A. Excused/Unexcused absence
- B. Sanctions

CHAPTER IV. BUSINESS/FINANCIAL

4.0 ANNUAL BUDGET

- A. Define fiscal year
- B. Fiscal policies (how will books be kept?)
- C. Expenditures

- I. What can be incurred?
- II. How to approve expenditures
- D. Preparing Budget (timeline)
- E. Approval (how is budget approved?)
- F. Reporting of Expenditures
 - Time limits
 - Penalties
 - Responsibilities

CHAPTER V. ELECTIONS

5.0 GENERAL RULES

- Who can become a candidate?
- Eligibility
- Qualifications (grades, hours, academic standing, previous experience)
- When are elections held?
- How are ballots cast?
- How is the winner decided?

5.2 INAUGURATION

- When?
- Oath of Office

5.4 VACANCIES

- How to fill a vacancy?

CHAPTER VI. DISCIPLINE AND IMPEACHMENT

6.0. DEFINED

- A. Grievance-a complaint filed by another member
- B. Warning-a verbal or written or written admonishment given to the recipient of a grievance
- C. Censure-a public (in meeting) admonishment Impeachment-a charge which results in removal of office

CHAPTER VII: ADVISORS

-Who qualifies?

-What are their duties/expectations for the role of advisor?

CHAPTER VIII: AMENDING THE BY-LAWS

- D. What is the process that the group will go through to amend the by-laws? By-laws can be changed much more easily than the Constitution, so don't make the process too long and drawn out.

ONCE WE'VE GOT THEM-WHAT DO WE DO WITH THEM?

Remember the reason for having a constitution and by-laws. They articulate the purpose of your group and spell out the procedures to be followed for its orderly functioning. A constitution usually requires a 2/3 vote of the membership for adoption. By-laws only require a simple majority for passage. Once you have developed the constitution and by-laws and kept up to date to reflect the current state of affairs.

Make sure every new member of the group has a copy. This will help to unify your members by informing them about the opportunities that exist for participation and the procedures they should follow to be an active, contributing member. A thorough study of the constitution and bylaws should be a part of officer training and transition.

SEVEN RULES FOR WRITING BY-LAWS

- 1). Know your Group.

Does the group want detailed and specific wording that leaves little room for interpretation or does it want more general wording that can be interpreted broadly? Some groups want and need to have everything spelled out in detail. Others would find such a system to be too rigid for their needs and want language that would be more flexible and allow the assembly the freedom to do what it thought best. This question needs to be answered before the first word is written.

- 2). **You don't have to put everything in the by-laws.**

It is not uncommon for groups to have by-laws that run too many pages because the members have decided that everything is too important to be left out. Examples of this include the day and time each committee's meetings are to begin and how many copies members may make using the copying machines. A group should keep its by-laws as short as possible with only the truly important items included. They should be encouraged to use the other documents of authority such as special rules of order, standing rules, and standing orders for items for lesser importance.

- 3). **Avoid contradictions and omissions.**

By far the most common error to be found in a set of bylaws is for one clause in one article to be stating one thing about a subject and another clause in another article to be stating something entirely different about the same subject. This leads to members of groups trying to decide the correct interpretation of the by-laws on that particular subject. Less common but still troublesome is for a topic to be omitted entirely, leaving the members to try to guess what the original writers were talking about. Therefore, the draft by-laws should be carefully checked to avoid the creating of such connotations or omissions.

- 4). **Arrange the contents of articles and sections logically.**

Write your by-laws so that there is a logical flow from one subject to the next. Do not scatter related items throughout the document. Too many times members frantically flip through pages of the by-laws trying to find the specific sentence that relates to a problem after someone has said that they saw it in there somewhere. So, as the articles and sections are assembled, make every effort to place all of the common topics. e.g. qualifications of members, duties of officers, and conduct of elections in the same location within the document.

5). **Have realistic expectations.**

Sometimes members of a group have an idea that, at the time, appears to be particularly useful. To make sure that the idea is used it is enshrined in the by-laws. However, both the times and the people change. Do not put requirements or duties in the by-laws because you think it would be nice to be done that way and expect your successors to adhere to them faithfully, even if they no longer make any sense. This leads to future members ignoring the by-laws.

6). **Help your successors.**

In certain circumstances you can make use of rhetorical flourishes in your by-law to guide your successors as to what your intent is. For example, phrases such as, “In the unlikely event that...” or, “After due and careful consideration of...” may prove useful. This advice is particularly useful for groups, especially boards, which have a rapid turnover in membership and have less institutional memory among the members to interpret the by-laws. However, use this method sparingly as overuse can lead to more problems than are solved by cluttering up the by-laws with too much extraneous language.

7). **Don’t forget spelling, punctuation, and grammar.**

By-laws with spelling and grammatical errors are more difficult to understand. Also, a poorly written set of by-laws reflects badly the group when read by an outsider. So, a group should make the effort to ensure that the final product is as well written as possible. If it is not possible for the assembly to make all the corrections before it adjourns, then it can empower the by-laws committee to make any necessary post-adoption corrections before publication.

In conclusion, when a set of by-laws need to be written, revised or amended, the group should devote a great deal of care and effort to this task. Since the by-laws are the most important document the group has, anything less will not be adequate. There are references on parliamentary law and by-laws available, and the members of a group should not hesitate in using one or more of them when the bylaws need to be changed. In addition, it is hoped that by following the “Seven Rules” as described above, the task of writing by-laws will be made easier and the final product will turn out better.

Running Effective Meetings

A meeting can be effective and enjoyable with proper planning and preparation. A meeting has several functions. During meetings members can communicate to keep the group cohesive. But, most of all, a meeting allows a group to pull resources together for decision making. If the facilitator starts with a careful plan and finishes with a thorough follow-up, the next meeting will “run itself.” The following are some tips to make your next meeting successful, productive and even fun.

BEFORE THE MEETING

- 1). Define the purpose of the meeting. If you can't come up with a purpose, don't have a meeting.
- 2). Develop the agenda with the officers and advisor. Below is a sample agenda:

Call to Order

Approval of Agenda

Correction and Approval of Minutes

Officer's Report

Treasurer's Report

Committee Report

Unfinished Business

New Business

Special Issues

Announcements

Adjournment

- 3). Distribute the agenda and circulate background materials, lengthy documents or articles, prior to the meeting so members will be informed and feel involved and up-to-date.
- 4). Choose an appropriate meeting time. Set a time limit and stick to it. Remember that members have other commitments. They will be more likely to attend a meeting if you make it productive, predictable and as short as possible.
- 5). If possible, arrange the room so that the members face each other, i.e., a circle or semi-circle. For large groups, try U-shaped rows. A leader has better control when s/he is centrally located.
- 6). Choose a location suitable to your group's size. A small room filled with people can get stuffy and create tension. A larger room is more comfortable and encourages individual expressions.
- 7). Use visual aids for interest (e.g., posters, diagrams, ect.) Post a large agenda in front of members to refer.

DURING THE MEETING

- 1). Greet members and make them feel welcome, even late ones, when appropriate.
- 2). If possible, serve light refreshments. Food is a good ice breaker and make sure the members feel special and comfortable.

- 3). Start on time. End on time.
- 4). Review the agenda and set priorities for the meeting.
- 5). Stick to the agenda.
- 6). Encourage group discussion to get all points of view and ideas. You will have better quality decisions as well as highly motivated members. They will feel that attending meetings is worth their while.
- 7). Encourage group discussion to get all points of view and ideas. You will have better quality decisions as well as highly motivated members. They will feel that attending meetings is worth their while.
- 8). Keep conversation focused on the topic. Feel free to ask for only constructive and non-repetitive comments. Tactfully end discussions when they are getting nowhere or becoming destructive or unproductive.
- 9). Keep minutes of the meeting for future reference in case a question or problem arises.
- 10). The leader should be a role model by listening, showing interest, appreciation and confidence in members. Admit mistakes.
- 11). Summarize agreements reached and end the meeting on a unifying or positive note. For example, have members' volunteer thoughts of things they feel are good or successful, reciting a group's creed, or a 'good of the order.'
- 12). Set a date, time, and place for the next meeting.

AFTER THE MEETING

- 1). Write and distribute minutes within three to four days. Quick action reinforces importance of a meeting and reduces memory errors.
- 2). Discuss problems.
- 3). Follow-up on delegation decisions. See that all members understand and carry-out their responsibilities.
- 4). Give recognition and appreciation to excellent and timely progress.
- 6). Conduct a periodic evaluation of the meetings. Weak areas can be analyzed and improved for more productive meetings.

How to Write Effective Minutes

Many groups vegetate between meetings. There is little or no follow-up of decisions reached at the previous general meeting, and the next one is likely to have a “no report” from committee chairs.

The vigor and movement forward of group is often more closely related to what happens between meetings than with what takes place at the meetings themselves. Keeping the membership informed is vital to the survival of the group.

The Use of Minutes

Minutes from a meeting are an official record of the business of the group. Minutes give continuity to procedures, traditional activities, ect. And inform members who were not in attendance. They are useful in following-up with assignments and decision and are very helpful on planning agendas for future meetings.

Minutes should include:

1. The name of you organization, committee, ect.
2. The type of meeting that is being held.
3. The date of the meeting.
4. The location of the meeting.
5. The name of the presiding officer and secretary (the latter at the end of the minutes, with signature above typed or printed name).
6. Notation of reading of the previous minutes and how they were approved (“approved as read” or “approved as corrected”).
7. All the major motions (except those withdrawn) and points of order or appeals, whether sustained or lost and all the other major decision. Include the name of the person making the motion.
8. The names of the committee members and a statement of the committee members and a statement of the committee assignment.
9. Names of members present in official policy groups. In most groups, member attendance is kept in a separate section of the record book.
10. Adjournment. Mention date-time-place of next meeting.

Ideas for writing minutes

1. Use full names, not nicknames.
2. Don’t be embarrassed to ask the officers to restate a motion if you don’t understand the phraseology or to repeat a person’s name if you are not sure.
3. State whether or not the motion was carried. (The number of votes cast is not necessary unless it is required in your by-laws or a special situation arises.
4. Make any corrections in your minutes immediately before you forget.
5. Record what is done, not what is said.

6. Summarize important discussions, if knowing why a decision was reached is necessary to understand the decision.

Some members may not be interested in minutes and do not make the effort to read them. This is true of “marginal” members, and honorary members especially. Newsletters offer an excellent alternative for keeping for keeping members informed and in a more interesting way. Here are some ideas:

1. Provide a calendar for upcoming events. Name people who are doing important work for the group.
2. Name people who are doing important work for the group.
3. Outline recent decisions that affect the organization, internally and externally.
4. Cartoons, clip-art, and free hand lettering of artwork offer variety and are eye-catchers.
5. New members can be identified.
6. Club projects can be sharpened.

Bulletin boards offer another opportunity for keeping members informed; photographs, brochures and cutouts can be posted without delay, notes can be written between members; and interested student may become prospective members.

MEMBERSHIP DEVELOPMENT

Recruiting and Orienting new Members

Members are vital to a group. Nothing can be done without them. Sometimes the easiest part is to attract new members, but it is oh, so easy to lose them. Each year, a critical look should be given to membership recruitment and development. The general membership cycle of a student group includes new members, current members and graduating members. It is ideal for a group to begin the year by recruiting enough members to replace those that are graduation or have left the group. This gives the group several months to orient new members and develop new leadership with in the current membership to sustain the group. Whatever you do, get your entire group involved in the recruiting process.

If there have been goals set that depend on a significant increase in membership, then the group needs to make sure its recruitment and development plans will meet this new need.

1. Member Profile

What people do we need to help the group succeed? _____

What skills do they need? _____

Who would we like to have joined? _____

How many new members can the group reasonably assimilate? _____

2. The Recruitment Campaign

How long will the recruitment period last? _____

When will it begin? _____

How will you recruit? By invitation? By mass meeting? _____

Where will you recruit? (What places would prospective members hang out? Do they have a special interest? _____

What kind of publicity will attract them? _____

Think back to when you first became involved. What attracted you? Why have you stayed involved?

Basic Leadership Skills Area

Communication. Both leaders and followers need to have basic organizational skills to organize thoughts and ideas effectively, express these orally or in writing, and have the ability to present these ideas/thoughts to others persuasively, as well as listen and receive information from others. Areas of development include giving and receiving feedback; effective listening; how to speak to groups; facilitation skills; and interpersonal skills.

Critical Thinking

The ability to “think on your feet” is an important skill for leaders and followers alike. Being able to identify problems, and collecting, organizing and analyzing information are important. Areas of development include problem solving, and dealing with ambiguity.

Self-Confident/Self-Esteem

To get more students involved in leadership roles on campus it is important to build the self confidence and self esteem of potential leaders so that they can feel good about themselves and their roles in student groups and beyond. Areas of development include assertiveness and self-confidence;

Initiative/Motivation

Without having a strong sense of purpose and then taking action, leaders would make little progress. Leaders need the ability to share enthusiasm with members to gain support to accomplish goals. Areas of development include motivational skills, empowering others and taking risks.

Leadership

What is leadership? How do you identify leaders? How do you become one? Leaders are the ones who guide and direct members to achieve their objectives. Areas of development include leadership styles, ethical leadership, and power and usage of leadership.

Self Knowledge/Self Awareness

How well do leaders know themselves? Can they recognize and accept their strengths and weaknesses? Can they assemble people around them to compliment their skills? Effective leaders know themselves and appreciate the gifts and talents of members, utilizing them to accomplish organizational goals. Areas of development include self-assessment tools, stress reduction, and managing emotions.

Conflict Management

Leaders may have to deal with stressful situations and antagonistic people. They need to be able to separate themselves from the membership and resolve tensions to make the organization cohesive. Areas of development include conflict management, and meditations.

Goal Achievement

A group cannot exist without a goal. Leaders need to understand what goals are how to achieve them Areas of development include setting goals and objectives; action plans, project planning, strategic planning delegation, evaluating goals, accountability, vision and time management.

Networking

The more people you know, the greater the probability that you may know someone who can help you if you run into problems or need advice. Networking is an important way to build community and can increase the power of what the group sets out to accomplish. Areas of development include meeting others and building a community.

LEADERSHIP DEVELOPMENT PLAN

Prepare skill for each position within the organization (executive board members and chairperson). That is, indentify the skills needed by the person holding the position. Use the Basic Leadership Skills listed above to help complete this Leadership Development Plan.

Position: _____

Skills: _____

Position: _____

Skills: _____

Position: _____

Skills: _____

Talking to Prospective Members

For many people the hardest thing to do is to meet new people. Here are some basic conversation starters:

- ❖ Talk about the group (The purpose, goals, projects, programs, and services).
- ❖ Tell them to tell you about themselves (really listen)!
- ❖ Tell how the group could benefit them. Let them know how their talents, skills, and interest could help the organization.

Welcoming New Members

Many groups find it beneficial to have a special welcoming meeting or ceremony for their new members. As orientation programs complete with get-acquainted activities, historical information, and organizational information (constitution, minutes from the last few meetings, project/program/service descriptions) will be very much appreciated and make the new members feel included right away.

To maintain this welcoming atmosphere, continue doing introductory activities. It is important to share with new members how meetings are run and what is expected of them. Share with them any policies and procedures that are sure to affect them. Include them on any address lists and make sure each member gets an updated list. During meetings, take time to ask if anyone has any questions. Do not assume that the new members are given a recap of what is being discussed and why.

Many groups forget about orientating new members to the group and getting them involved. The easier you make the transition to membership, the more likely a new member will stay with the group. Develop an orientation plan for new member's development.

Finding New Leaders in Your Group

Election time can be a real headache in many organizations. This is especially true if the group does not have any formal leadership development plan for its members. Just as it is important to replace any members to take on leadership roles as they become available.

Identifying Potential Leaders

- 1). which individuals have an interest or skill in a specific activity in which leadership is needed?
- 2). which individuals have time and enthusiasm?
- 3). who has good interpersonal, communication and organizational skills?
- 4). who in the group has the knowledge and /or skills, or has access to information needed by the group?
- 5). who has worked hard and shown commitment and follow-through?
- 6). who deserves recognition for past or current effort?
- 7). are there individuals who might develop a greater sense of belonging or commitment to the group by being in a leadership position?
- 8). who has room to grow and is willing and ready to work hard given the opportunity.
- 9). who will add to the diversity of the group and its leadership?
- 10). are there some individuals who will work together more compatibly than others?
- 11). prepare a leadership survey of the membership. Good questions to use for the interview:
 - ❖ Why did they join? What does the group mean to them?
 - ❖ What are their needs and goals?
 - ❖ What are their time commitments?
 - ❖ What are their leadership desires?
 - ❖ What are their career aspirations?
 - ❖ What experiences do they have in their background?

Encouraging New Leaders

- 1) Continuously stress the importance of all leadership roles in your group (whether formal or not).

- 2) Help new members develop their skills through delegation, support, and training opportunities.
- 3) Share with your group the benefits of being a leader-what you've gotten, how you've grown.
- 4) Clarify job requirements and descriptions of responsibilities.
- 5) Make sure that members know that closure and transition will be orderly and thorough.
- 6) Model an open, encouraging, and flexible leadership style. Encourage people to talk to you and don't be mysterious about what you do.
- 7) Personal encouragement by old officers is acceptable in most cases, but best done privately.

The skills that have been identified as common to both leader and member should be part of the general membership, education and training. The best way to find new leaders in any group is to develop them from the very beginning.

Leadership development can be done throughout the year. Tank some time to plan out the group's calendar. Make an effort to conduct a membership development workshop at least once a month.

ADVISORS

Current University regulations require that each student organization have a full time faculty or staff advisor. What are they for? How can you best utilize you advisor? An advisor has three basic functions:

- ❖ An advisor is a consultant to help with the organization's growth and development.
- ❖ An advisor adds to the community or your organization.
- ❖ An advisor helps in the area of program content and purpose.

The advisor may be a director or an overseer, but the approach lies somewhere in between. Choose your advisor well. If your constitution calls for your academic department to appoint one, make certain you input is considered. Discuss with your group and with your advisor what you want the advisor's role to be. Take into consideration that the advisor has to maintain a liaison role between the organization and the University. Your advisor is a consultant and should be a stabilizing force should you need help.

CHOOSING AN ADVISOR

It is important for an organization to find a good advisor, someone who will be willing to assist the student leaders and be accessible for consultation if needed. All registered organizations are expected to have at least one IUS faculty or administrative staff member serve as an advisor. Student organizations are encouraged to talk with faculty or staff members that they know and ask them to advise their organization. If the student is having difficulty finding an advisor, the coordination of student activities will serve as an advisor until one is found.

If faculty or staff member is being approached to be an advisor, make sure a discussion is held on the advisor's expectations. The role of advising will vary somewhat from group depending upon the expectations each has for one another. It is crucial during the initial stages of the relationship that the organization's members and advisors discuss, negotiate, and clarify the advisory role. Use the worksheet ADVISING ROLE (found in the appendix) as a guide to shape the desired advising relationship and the worksheet ADVISING AGREEMENT to make a commitment to the relationship expectations. If changes take place during the course of the year, either on the part of the organization or the advisor, the

role may need to be re-negotiated and redefined. The advisor's role should be revisited on a yearly basis, usually after elections to review the commitments.

The Student Organization/Advisor Relationship

An advisor can have a positive effect of the success of the organization especially if they have a strong belief in the organization, a desire to help students succeed, the ability to share expertise, and a commitment to spending some time with the group.

An advisor can help a student organization by:

- ❖ acting as a liaison between the organization and the institution
- ❖ clarifying institution policy and procedures
- ❖ providing a different perspective providing positive feedback and constructive criticism
- ❖ providing continuity to the organization's policies, programs, and traditions
- ❖ assisting with the training of new officers and members developing leadership skills with organization members
- ❖ encouraging students to maintain a balance between academic and co-curricular aspects of student life
- ❖ acting as a positive role model

The student organization can help the advisor by:

- ❖ *giving an orientation relating to the organization's activities and structure*
- ❖ *providing meeting times to the advisor*
- ❖ *providing the advisor with regular updates on student organization's financial status*
- ❖ *keeping the advisor informed of organization's plans and problems*
- ❖ *making use of the advisor's background and experiences*
- ❖ *inviting the advisor to activities*
- ❖ *making the advisor feel welcome and a part of the group*
- ❖ *showing appreciation for the advisor's services*
- ❖ *distributing minutes of the meetings and other organization material to advisor*
- ❖ *being willing to discussing any dissatisfaction members have with the advisor and allowing open communication*

❖ Position: _____

❖ Skills: _____

❖ _____

❖ Position: _____

❖ Skills: _____

❖ _____

❖ Position: _____

❖ Skills: _____

❖ _____

1). What skill or skills are needed for all these positions? _____

2). Next identify the skills that are needed by members of each committees, (not chairpersons) for them to be able to be effective and for the committee to be productive and successful:

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

Committee _____

Skills _____

3). What skill/skills are common to all members of committees? _____

5). What skill/skills are common to both committee members and organizational leaders? _____

ADVISING ROLE SURVEY

This survey is adapted from the Student Organization Handbook of University of Southern Indiana. The following is a series of several different advisor and officer functions. This is a good tool for student leaders and the advisor to use in determining what role the advisor will have in the group. This worksheet should be completed by a chosen groups within the group (i.e. the executive board) and the advisor, separately. After the group had come to a consensus with the answers, the advisor should be brought in to review and compare answers. Both should discuss any differences in the ratings and reach an agreement. Next to each statement, indicate who will be responsible for that role (i.e., president advisor, vice president, ect.) This should be done with each new executive board, or yearly. Use the *Advising Agreement* to formally record the expectations of advising.

An Advisor Should:

1. be a problem-solving agent	5	4	3	2	1
2. be a counselor	5	4	3	2	1
3. be an information-resource	5	4	3	2	1
4. be an idea-resource	5	4	3	2	1
5. be a sounding board	5	4	3	2	1
6. be an administrative representative	5	4	3	2	1
7. be a change agent in the organization	5	4	3	2	2
8. be an interpreter of university policy	5	4	3	2	1
9. be a student representative	5	4	3	2	1
10. be an analyzer of group process	5	4	3	2	1
11. be a guarantor of success for programs	5	4	3	2	1
12. be a personal role model for behavior	5	4	3	2	1
13. be an attendee at all events	5	4	3	2	1
14. be the one to do student programs	5	4	3	2	1
15. be a coordinator/advocate to balance student program	5	4	3	2	1
16. provide continuity for the group from year to year	5	4	3	2	1
17. be a developer/planner of new programs	5	4	3	2	1
18. be an educator/training of program philosophy and skills	5	4	3	2	1
19. be a developer of student leaders	5	4	3	2	1
20. be an education/trainer of leadership and organizational skills (i.e. ensure training happens, workshops of success for programs)	5	4	3	2	1
21. be a maintainer of organizational activities and meetings	5	4	3	2	1
22. work out personal conflicts within groups	5	4	3	2	1
23. be a financial supervisor	5	4	3	2	1
24. be an organizer of organizational activities and meetings	5	4	3	2	1
25. be responsible for election of the organization's board	5	4	3	2	1
26. be knowledgeable/expert in programming skills (i.e., contract negotiation, legal issues, ect.)	5	4	3	2	1
27. be a double-checker of program production details	5	4	3	2	1
28. orient new officers to their roles /responsibilities	5	4	3	2	1
29. recruit new members to the group	5	4	3	2	1
30. be responsible for maintaining productive/positive energy level in the group	5	4	3	2	1
31. attend all meetings	5	4	3	2	1
32. have the power to veto decisions	5	4	3	2	1
33. evaluate programs	5	4	3	2	1
34. evaluate student leaders in the group	5	4	3	2	1
35. keep informed of issues that affect the group	5	4	3	2	1
36. be responsible for coordination between other groups	5	4	3	2	1
37. Other _____	5	4	3	2	1
38. Other _____	5	4	3	2	1
39. Other _____	5	4	3	2	1
40. Other _____	5	4	3	2	1

ADVISING AGREEMENT

Fill this form out complete and return a copy with your renewal form to the Campus Life Office.

The members of _____ (group name)

request that _____ serve as advisor for the group

for the _____ - _____ academic year.

Our mutually agreed expectations of The Advisor:

The Student Leaders:

The Group:

As the representative of the named group, we have met with the advisor and have discussed the duties and responsibilities of being the leaders in this group. We agree to fulfill these duties to the best of our abilities.

Signed: _____ (president or representative) Date: _____

I have met with the groups named above and have discussed the duties and responsibilities of the Advisor: I agree to fulfill these duties to the best of my ability.

Signed: _____ Date: _____

Campus Address and Phone Number: _____

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