LOCAL I-O GROUP TOOLKIT

Tools for Starting & Maintaining a Successful Local I-O Group

SIOP | **SOCIETY for INDUSTRIAL and ORGANIZATIONAL PSYCHOLOGY** ®

SCIENCE FOR A SMARTER WORKPLACE

INTRODUCTION

Welcome!

Thank you for your interest supporting a local I-O group in your area! Your leadership is admired and deeply appreciated. Promoting the field of I-O Psychology through networking and professional development cannot be done without people like you who believe in I-O Psychology's ultimate goal to make workplaces better for all.

This ToolKit has been provided to you by SIOP's Local I-O Group Relations Committee, an ad hoc committee formed by SIOP president Tammy Allen in 2013. Our mission is to "*help grow and maintain communities of professionals who share an interest in promoting the science and practice of psychology to the world of work and organizations. We do this by facilitating the sharing and distribution of best practices for local groups in the US and internationally*." We hope this ToolKit helps you advance your local group!

Good luck!

The Local I-O Group Relations Committee

> *"The true meaning of life is to plant trees, under whose shade you do not expect to sit."*
> *-Nelson Henderson*

What is a Local I-O Group?

A Local I-O Group is a community of like-minded people who get together to share their interest in applying the science of psychology to organizations. Local groups can be virtual or face-to-face depending upon the group's interests and geographic scope. SIOP does not have a chapter structure for local I-O groups; local I-O groups are created, maintained, and dissolved, solely by its members.

Local I-O Group Resources

- **The Local I-O Group SIOP webpage.** Our committee maintains the Local I-O Group webpage, a place where you can find and download this ToolKit as well as other resources including:

  o **Local I-O Group Locator**. Before creating a local I-O group, be sure to check that one doesn't already exist in your area. You can do this by clicking here and accessing a list of US based local groups.

  o **Regional Representatives**. Our committee members can provide you with guidance and thought partnership. Click here to find out who to call on your region. We are honored to play a role in your journey to fulfilling your vision in creating a lasting and successful local I-O community!

  o **Event Calendar**. Our committee maintains a calendar to allow local groups to share upcoming events and meetings. If you have an upcoming meeting and would like it posted on the event calendar, contact your regional representative directly or via our committee's email address Local_IO_Groups@siop.org.

GETTING STARTED

Create a Vision/Purpose

Local I-O groups invite people to enlist in a collective vision. Prospective members need to believe in the group's underlying purpose in order to make a decision to join the group. You might ask yourselves:
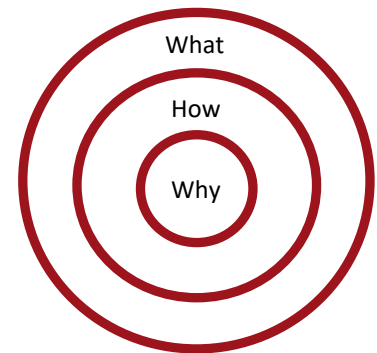
- Why are we creating this Local I-O Group? What is the need in this area that isn't being met?
- How do we want people to feel when attending our meetings or events, both during and after?
- Do we want our group to mostly have informal get-togethers for networking (e.g., happy hours), formal meetings, or a combination of both?

Consider crafting a purpose statement so that prospective members can deeply connect with the group's purpose, vision, and guiding principles. Once people are emotionally connected to the purpose statement and believe in the "cause," it is up to the founding members to deliver on that purpose and use it as a guiding compass to increase followership and build momentum.

New group? Use your purpose statement to connect with others and start building coalitions so that you can recruit fellow founding leaders.

Reviving group? If you are trying to revive a group that is languishing, consider surveying your current and potential members to see what they need from a local group. It might be time to redefine the group's purpose.

Need ideas? Go to the SIOP Local I-O Group webpage to see how other groups define themselves.

> **TIP**: Watch Simon Sinek's TED Talk, "How Great Leaders Inspire Action" for a simple, yet powerful framework (The Golden Circle) for creating a purpose statement.

POLICIES & BUDGETING

How structured does your group need to be?

It is important to define your group's policies so that there is clarity with processes and procedures. While some groups prefer to have no formal structure, others have written bylaws and mission statements.

Links to sample bylaws

- Personnel Testing Council of Metropolitan Washington (PTCMW): ptcmw.org
- Gateway I-O Psychologists (GIOP): http://www.gatewayio.org/page-1320412

Budgeting income and expenses

Income can include things such as:
- Membership fees (if any)
- Guest / per meeting fees (if any)

- Sponsorship (if any – some groups will allow local companies to sponsor events and show their logo at start of meeting and on group website and newsletters)

Expenses to consider

- Meeting Room/Venue
- Food
- Speaker costs (travel expenses – although many speakers are free)
- Website
- Online Member Management Software

Keeping track of expenses

- **Smaller budget**? Track membership using Excel or Google spreadsheets.
- **Larger groups or those with larger budgets**? Consider member management software such as www.wildapricot.com which includes website support, member database setup, event management, and an online store.

ESTABLISHING PRESENCE

Whether just starting a new group or enhancing the presence of an existing group, there are many ways you can promote your local I-O group. Based on the skills of your group members, you can establish a presence with any or a combination of the following. You can either assign a member to manage your site or use dues to pay someone.

- **Websites**. Websites usually charge a fee and require a domain name to set up. Below are a couple of examples of local I-O group websites:
  - Weebly engine: Chattanooga I-O Psychologists (CHIOP) https://chattanooga-io-psychology-group.weebly.com/
  - WIX engine: Ohio I-O (OH-IO) https://columbusoh-io.wixsite.com/oh-io
- **LinkedIn groups**. LinkedIn groups are free. Below are a couple of examples:
  - Dallas Area I-O Psychologists (DAIOP): https://www.linkedin.com/groups/2624489/
  - Bay Area Applied Psychologists (BAAP): https://www.linkedin.com/groups/2523213/profile

Be sure to post on the Local I-O Group's SIOP webpage!

Submit your group's information to SIOP to be added to the I-O Groups Page by contacting siop@siop.org. You can also contact one of the members of the Local I-O Group Relations committee by emailing Local_IO_Groups@siop.org.

Other Tips for Success

- Create a plan for outreach and member recruitment.
- Determine how often to email members and about what.
- Avoid sales-type emails with product information.
- Disseminate information that is useful to your member base.

ATTRACTING MEMBERS

Define your target audience

Define your target audience and use this to inform the different types of membership status. There are many different target audiences and types of membership for you to consider. It is up to you to decide if you want your group to be very niche or more general.

Membership considerations

Your members will be attracted to your group's purpose. Below are a few considerations for membership:

- **Broad or narrow focus?** How broad do you want your meeting topics? Will you focus on a narrow particular workplace issue, such as diversity or leadership? Or will you have a broader focus and include any work-related improvement efforts such as executive coaching, training, and HR policies?
- **Professional focus?** A professionally oriented local group enjoys "talking shop" and discussing applied workplace issues. A potential disadvantage is that members may get removed from the latest research and/or a more rigorous approach to analyzing problems to generate more sustainable solutions.
- **Academic focus?** Academically oriented local groups tend to focus more on the research side of work. These groups enjoy discussing ways to systematically study and understand workplace issues. A potential disadvantage is that members get removed from the practical application of their research and lose touch with professionals who could offer needed samples and perspective.
- **Mixed focus?** Most local groups tend to include those who have an interest in the application of the science of psychology to the workplace, The Local I-O Group Relations committee has observed that groups with a mixed membership tend to get the best of both worlds. The key is to vary meeting topics and make it a habit to apply the research to a presenting workplace problem whenever possible.
- **Degree required?** Do they need a degree in I-O psychology and, if so, what level? Can someone with interest in applying I-O principles to the workplace be member without a degree in I-O?
- **Student members?** Many groups welcome student members as they can offer a fresh perspective, assist with job placement, and create a pipeline for future leadership. Factors such as field of study, graduate vs. undergraduate status, and type of enrollment (full-time or part-time) are often considered.
- **Non "I-O" members?** Non I-O members can include training professionals, executive or life coaches, and human resource professionals. Often non "I-O" members do *not* have a research oriented background although this need not exclude them from your group if they align with your group's purpose.

Options for attracting members

- **SIOP AO.** Reach out to the SIOP Administrative Office to see how to connect with potential members in your geographic area.
- **Current members**. If you have an existing group, remind your members to invite those whom they think would enjoy your group's mission.
- **Social Media**. Use social media to attract and inform others about your group. You can create your own websites to share information, or utilize pre-existing websites (e.g., LinkedIn) to host group information.
- **Survey your member's interests**. Collect and use feedback from members to identify answers to common questions about group programming. Surveying is common practice, though there are multiple ways to collect feedback beyond member surveys.
- **Ask other local groups**. Ask other local I-O groups to see how they are recruiting members!

LEADERSHIP BOARD

Local groups are more likely to survive when they create a structure consisting of members who are willing to lead and take on specific roles. The roles of your leadership board will vary by size and makeup of the group. Our committee has learned that a group's longevity is linked to having a succession plan.

Below are some example leadership board roles

- **President**. This role, also called a Committee Chair, ensures the group has a clear goal, plans committee meetings, and helps ensure resources are available to meet the group's needs.
- **President-Elect**. The President-Elect prepares for the organization's future. This role often supports president on various special initiatives and prepares to carry the organization into the future.
- **Vice President**. The VP, also called a Support President or Program Coordinator, invites, coordinates and hosts speakers, finds sponsors, and fills in for the President as needed.
- **Treasurer**. The Treasurer keeps track of the budget including membership dues, payments to vendors ex. food, location, activities. If the group has a bank account this individual has access to it.
- **Executive Administrator**. The Executive Administrator, sometimes called a Secretary, records and stores meeting notes, sends event invites and group announcements, manages communications and marketing, and may help with meeting details such as catering, coordinating guest speaker arrangements, etc.
- **Communications Chair**. The Communications Chair, sometimes called the webmaster pending their role, is responsible for connecting members to the group activities.
- **Membership Chair**. A membership chair keeps track of member status including following any established member criteria, as well as recruiting and welcoming new members.

Other Board Meeting Tips

- **Share responsibilities**. Regardless of formal structure, sharing responsibilities is one way to get others involved as volunteers and build support for the group.
- **Create a succession plan.** As local group leaders are typically volunteers with a passion for I-O psychology, group leadership is encouraged to take succession seriously and have plans in place to avoid disruption to agenda, programming, and engagement when leadership transitions.
- **Schedule board meetings** for the year to get them on everyone's calendar. It's usually easier to cancel than try to coordinate schedules.
- **Make it easy to meet**. Host board meetings after regularly scheduled meetings to save time and travel.

Resources specifically for leaders

The initiatives listed in this section were requested by local group leaders to enable them to network and support each other. We are pleased to offer these services to local group leaders!

Who is a local group leader and how do they get included? Our committee leaves it up to local groups to tell us who their leader or contact person is. If you are not sure that we have the right leader/contact for your group, please reach out to your regional representative to inform them of your current leader's name and contact information. Please note that by submitting contact information to the Local I-O Group Relations committee it will be shared with other local leaders.

LinkedIn SIOP Local I-O Group Leader Forum

This group was created to provide a forum for discussion among Local I-O Group Leaders throughout the United States and around the world. It was created as a platform to allow current, previous, and future group leaders to share best practices in running their local I-O group.

The forum, which seeks collaborative discussion and information sharing, is sponsored and maintained by SIOP's Local I-O Group Relations Committee. The goal of the ad-hoc Committee on Local I-O Groups is to create a strong connection between SIOP and local I-O groups. We aspire to strengthen and connect local I-O communities around the globe.

Local I-O group leaders are encouraged to click here to join.

ListServe

This listserv is intended to provide a forum for leaders of local I-O groups to get to know and learn from each other. Use this to share ideas and best practices, ask questions of each other, ask for help, and chat.
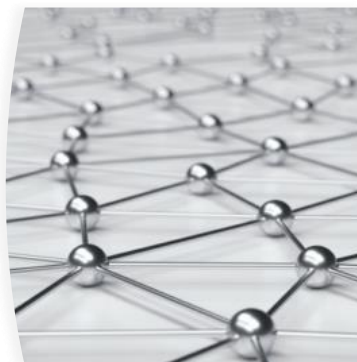
You are able and encouraged to communicate directly with each other through this listserv. You do not need to go through a moderator, though the Committee will monitor content for proper use. Simply send an email to Local_IO_Group_Leaders@googlegroups.com, and your email will go to all listserv members in just one click! Be sure to add that email address to your contacts. Membership in this group is voluntary, and you may leave the group at any time.

Online leader forums

Local group leaders are also invited to participate in periodic leader forums. The first forum was held on May 29, 2020. The goal of these forums is to make it easy for local I-O group leaders to connect, network, and learn from each other in order to create and sustain engaged grass root, local groups.
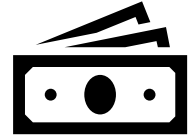
Hosted SIOP conference sessions

The Local I-O Group Relations committee frequently hosts a session at the SIOP annual conference and welcome local group leaders to attend, share best practices, and network.

DUES

Begin to set up your group's infrastructure and processes for growing and maintaining a membership list. You can start small and grow as your group's needs grow. Establishing such infrastructure will help with creating seamless communications, maintaining a list of member names, and/or collecting membership dues.

Will dues be required to maintain membership? How will you monitor membership and collect dues?

Decide if you will have membership dues by considering the size of your group, your financial plan, and the types of community you are wanting to create. You can leverage your relationships with business or universities to perhaps provide sponsorship. Some groups charge fees while others do not.

Below are some examples of membership dues

- **No Dues**. Informal and start up groups without ongoing expenses will pay as they go.
- **METRO**. Ten annual meetings. Annual dues of $120 Member / $50 Student
- **Memphis I-O Psychologists (MIOP)**. Four annual meetings. Annual dues of $40 professionals / $20 Students
- **North Carolina I-O Psychologists (NCIOP)**. No annual dues; dues collected upon attendance at semi-annual conferences (typically $40 for professionals and $15 for students)
- **Sponsorship**. Some groups work with sponsors or accept in-kind contributions to keep costs down.

MEETINGS

Consider frequency, location, and time. For example, will your group gather for breakfast, lunch, dinner, happy hour, or a combination of these throughout the year? Are your meetings only for networking or will you have guest speakers? The structure of a meeting can help with attendance, engagement, and retention. Many successful groups discuss research, new topics in I-O, and practical applications.
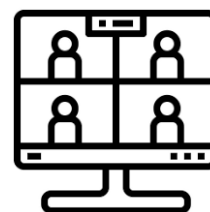
Examples for meeting events

- Career day Internship matching
- Mixers/Happy hours
- Joint meeting with other like-minded groups (Coaching, SHRM, ATD, etc.)
- Conference/Events or roundtable discussions
- Guest speakers including local business partners, leaders, research interests
- SIOP "Debriefing" meetings where conference attendees describe what they learned
- Share best practices

Other Meeting Tips

- Vary the day of week if it makes sense for your group. Some people, especially students and professors have meetings/classes on certain days of the week, so you don't want to permanently exclude them.
- Tuesday through Thursday nights tend to be the most effective.
- Consider the need for a group's preference for consistency.
- Keep in mind your target membership, and what best suites their schedules.
- Schedule meetings for the year and send them out to your members to get them on everyone's calendar.
- Post your meeting dates on your website.

Virtual Meetings

Virtual meetings have the advantage of giving people the ability to participate without having to travel or need to meet in person (as in the case of a pandemic). Below are some ideas for hosting virtual meetings.

Plan the meeting

- Clearly define the meeting's purpose, the agenda and timeline. Most people are comfortable with a one-hour online meeting unless it is structured as a highly interactive event.
- Advertise the meeting at least a week in advance.
- Promote guest speakers with a longer lead time.
- Send meeting reminder a day before including the simple agenda and attachments (e.g., meeting etiquette or tips for the platform you use).
- Define meeting roles such as:
  - **Facilitator**. One person to lead and facilitate the discussion.
  - **Note taker**. Someone to take notes.
  - **Chat monitor/Time keeper**. Someone to keep up with chats and alert host/facilitator of issues or questions.
  - **Tech support**. Alert people who to text/email in case of technical difficulties.

Virtual meeting tips

- **Laptop**. Remind participants that laptops make it easier to get to know each other. Tablets and phones tend to be less functional but are getting better all the time!
- **Participation.** Decide how to have everyone to participate. For groups over 6 or 7, consider creating a list (alphabetical order first name) to go around virtual room. Ask participants to say "come back" if not ready or "pass" if they don't have anything to say.
- **Get the latest software**. Remind people to do this at least one hour before the meeting begins.
- **Background noise**. Be mindful of background noise use the mute button.
- **Know the functions**. Below are the features that might be used during the call. Tell your members where they are and how to use them ahead of the meeting.
  - **Mute function**. Select "Mute" when not speaking.
  - **Video function**. Decide if you want to encourage, require, or ignore use of video function.

- o **Chat function**. Decide if and how you will use "chat". Have someone monitoring chat so comments are not ignored. Distinguish between private and public chats.
  - o **Participant functions**. Be familiar with how to determine number of people on call and any standard meeting functions (e.g., Zoom enables icons such as yes, no, Speed Up, Slow Down, Raise Hand as well as clapping or thumbs up).
  - o **Types of views**. Be familiar with different ways to manage your screen image. For examples:
    - ▪ **Speaker**. Makes the person speaking fill your screen.
    - ▪ **Thumbnail**. Shows participants around edge.
    - ▪ **Grid**. Makes screen look like Brady Bunch opening credits.
- **Use split screen**. You can see both the "shared screen" view AND the participants.
- **Us polling functions**. Polls during the call can increase engagement. They can be used before, during, and after the meeting.
- **Try the virtual fish bowl**. A fish bowl tool enables the facilitation of large group dialogue by focusing on a small group discussion in an inner circle while the rest of the group listens and observes from the outer circle. You can create a virtual fish bowl by dividing a large group into 3 or 4 smaller groups of 5 to 6 people. The smaller group discusses a topic for approximately 5 minutes while the others listen on mute. After 5 minutes is up, the rest of the group can participate for 5 minutes.

VENUES

There are various types of venues where you can host your local group meetings and events. Local groups meet annually, biannually, monthly, or weekly. A new group's charter and call-to-action will inform how often the group should meet and exchange information. Groups also identify and vary meeting locations to accommodate participants. Given the pressures of time and distance, some new groups leverage virtual options to get together, so consider if you will provide an option for members to join meetings remotely. Other new groups will find it easier to meet at restaurants or informal gathering areas, whereas groups hosting high profile speakers of psychology may choose more formal venues.

Below are some examples for meeting venues

- **Restaurants**. Some restaurants will let you meet for free provided you come on a less popular night (typically with the expectation or requirement of spending a certain amount on food).
- **Universities.** Partnering with a local university is frequently an affordable option. Some schools will sponsor events and give reduced rates for professional groups that tie into their education programs.
- **Hotel conference room**. Hotels tend to charge more but can be worth it if you want everything taken care of for you.
- **Meeting halls / Churches**. Can be a less expensive alternative. However, you need to balance desirability of venue.
- **Local company**. Having a popular local company host events in its office or headquarters can be an exciting space for attendees.

Venue consistency

Will you have the meeting in the same place or try to vary meeting location? Decide what is the best depending on your local group's needs. For examples:

- **Larger group.** Larger groups like **METRO,** with around 250 members, tend to use a centralized location every meeting (recently university conference room).
- **Small group.** Smaller groups like **Memphis I-O Psychologists,** who host around 15 to 20 people a meeting, make it easier for people to visit from different parts of their region by rotating the meeting around town.
- **Medium sized group.** **MPPAW** has its meetings at the same location and same time every month.

Meeting Format

Below is a sample of a typical two-hour in person meeting format.

Sample of a typical two-hour evening meeting format	
5:30 pm	Participants sign in and receive payment or dues if applicable. Encourage networking or initiate ice-breaker activities. Some groups supply food or drinks or have them available. Order food from server as appropriate.
6:15 pm	Group's leader calls the meeting to order, welcomes and introduces new members
6:30 pm	Speaker is introduced and speaks for about 45 – 50 minutes
7:15 pm	Q & A and closing announcements

LAUNCHING A NEW GROUP

When you launch your group with its first meeting or event, you want to be sure to set the tone. This can be done with a strong guest speaker in a formal setting and/or a networking happy hour. Many people are willing to speak for free to help promote our field. If you will be paying for a speaker, inquire about any fees inclusive of incurred travel expenses.

Market in advance

At least three months in advance, begin promoting your first meeting and the launch of your group. Send frequent reminders, at least weekly when you are a couple weeks away from the event.

Promote your event!!

- **Word of mouth**. Invite your members to pass the word to their colleagues.
- **Colleges and universities**. Grad students are a great opportunity to get early career people attending. Ideally, you want a balance of academic and business people. Ask professors to spread the word, they have a strong professional network to attract people to attend the event and might offer extra credit for attendance or sponsor class trips; this works at both undergraduate and graduate level.
- **Post your event in the SIOP event calendar**. Contact Local_IO_Groups@siop.org to have your meetings added to the event calendar.
- **Communicate through other local HR groups** such as local SHRM chapters, or local training and development associations.
- **Business contacts**. Depending on your group's purpose, consider inviting clients and colleagues.
- **Social Media**: Announce in LinkedIn, Facebook, Twitter, etc.

Other things to consider

- You may wish to not charge membership or guest fees in order to help build your pool of potential event attendees and long-term followership at your first meeting.
- **Offering food at meetings adds a nice touch**. This may mean that you have to get money in advance or risk running in the red. Consider a relationship with a restaurant or bar because some restaurants will let you use a large area for your meeting in exchange for members showing up and having a drink or something to eat on a night where few people frequent the place. Also, some groups strongly encourage members to buy something (food or drink) in thanks for the establishment's space. Newer restaurants and bars are frequently looking for someone to help get the word out about their establishment.
- **Keep in touch** and communicate with your members often to build community by utilizing social media, such as LinkedIn Groups.
- **Establish clear rules**. For example, do not make your meetings an avenue for sales pitches. Nothing will kill a group faster than people feeling like the meeting is only about someone trying to sell them something. If your guest speakers are representing companies, work with them to ensure that if they do want to talk about products, that they discuss the products within the context of the group's purpose. Speakers should never push their products or make their products the focus of the presentation.
- **Schedule annual meetings** for the entire year and get them on everyone's calendar.

MAINTAINING & OPTIMIZING

There are a variety of resources to help maintain and optimize your group including:

SIOP Support

While there is no formal affiliation relationship between SIOP and local I-O groups, SIOP does support local I-O groups in a variety of ways including:

- Helps source guest speakers.
- Locates a local I-O group that may already exist (or identify one that previously existed).
- Facilitates introductions locally with I-O people who want help getting their group started.
- Hosts a webpage on the SIOP website and resources including this ToolKit, an event calendar exclusive to local groups, and a place for local groups to connect with potential members.
- Sponsors the Local I-O Group Relations Committee.
- Hosts "The Commons" (formerly called the Community Zone) at the annual SIOP conference, designed to give committee members a forum to connect with SIOP members.

Continuing Education

- **Continuing Education Credit for Psychologists through SIOP.** SIOP is available to partner with local and regional I-O organizations in order to cosponsor continuing education for psychologists, under the auspices of SIOP's status as an approved sponsor with the American Psychological Association. If your organization offers in-person educational sessions for which you would like to offer continuing education credit to psychologists, please contact Susan Rogers at srogers@siop.org to discuss this program.
- **SIOP committees.** SIOP hosts other committees which can partner with local I-O groups to address specific needs:
    - Training & Education Committee can help with CE Credits
    - Professional Practice Committee can help meet the needs of practitioners
    - Various committees under the Diversity Portfolio can considering issues related to inclusion

Succession Planning

One of the biggest challenges for any group is sowing the seeds for future leadership so that the burden isn't left to one or two enthusiastic leaders, or when a leader is called away due to family situations or job transfer. Here are some options for leader engagement and succession planning:

- **"Prep one—work one."** Create a one-year term limit for the leadership role and have one person serve as the leader elect.
- **Board rotation**. Create a standard rotation so that each board member only performs one role a year. Make transitioning the rotation a ceremonial dinner celebration where the baton gets passed. This ensures that there is always someone to train the incumbent and coverage is facilitated in the case of life events and a loss of a leader.

MEMBER ENGAGEMENT

The following ideas were generated by members of existing groups at past SIOP sessions.

Welcome new members

First impressions are lasting impressions. Making new members feel welcome will increase the chances that they will be engaged and want to return. Our committee has also received feedback from local group members that groups with tight-knit or long-standing members can make it difficult for new members to fit in. Suggestions for making new members feel welcome include:

- Have current board members personally welcome and introduce new members.
- Invite speakers to dinner after the meeting and invite everyone to join.
- Ask new members to introduce themselves at each meeting.

Maintain member engagement

Creating a group can be fun in the beginning but become a bit stale over time after the initial glow wears off. Some ideas to increase engagement include:

- Discuss strategies to ensure member engagement at the end of each board meeting.
- Have board members wear name tags or ribbons that describe their roles.
- Make it easy for new members to meet people and feel like they belong.
- Check in with new members after they have attended their first meeting.
- Periodically survey members to identify better days and times for the meetings.
- Get creative with meeting topics by asking other local I-O group leaders what they do.
- Encourage new members to take on a committee role to get them involved.

Keep meetings fresh & exciting

You can gain momentum with your group while also keeping current members engaged in many ways including:

- Plan events to share knowledge and expertise
- Create continuing education events on hot topics.
- Plan time to socialize.
- Offer training sessions paired with networking/socialization activities.
- Have broader sharing of information across local I-O groups.
- Link to local I-O university programs. Many local groups have found that local faculty rarely participate in their local group meetings. Some groups have collaborated with their local university to co-sponsor programs and to involve graduate students in local meetings.

Good luck!

We are so excited to partner with you on this fun and rewarding journey! Please don't forget to stay in touch and let us know how everything is going. We want to hear about your successes and what we can do to better support you. Send us your comments and questions at anytime!