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If You Build It (Right), They Will Come: Building a Sustainable Local I-O Group

Bill Handschin, Maryalice Citera, & Denis Ochieng, Local I-O Group Relations Committee

The Local I-O Group Committee's November Leadership Forum focused on building sustainable local organizations that offer value to their membership. Participants in this forum represented the leadership of local I-O groups at various stages of development, from nascent organizations just starting to old and established organizations updating and refreshing their approach. All were interested in providing opportunities for I-O psychologists to congregate, share information about new developments in the field, build and grow personal relationships, and connect more effectively with their community. During the leadership forum, participants shared their experiences in breakout groups discussing what they are currently doing, what works, and the challenges they are facing. Two main topics emerged from the conversation: building sustainable organizations and creating value for local group members.

Building a Sustainable Organization

The discussion primarily focused on building sustainable local groups, using underlying mechanisms and structures that help support and maintain the organization through its evolution, including changes in leadership, environmental disruptions (like COVID-19), and membership recruitment and retention. In terms of building a sustainable organization, the following themes emerged: bylaws, leadership and the leadership pipeline, preserving organizational knowledge and records, communication and marketing, and the fee structure. When building a sustainable organization, structure should flow from purpose and reflect the needs of the membership of the local group. Hence, our second theme is creating value for members.

Bylaws

Bylaws establish consistency in how the organization is run. Bylaws describe the structure of the organization (the composition of the board of directors) and rules and procedures to be followed. Bylaws define the purpose of the group, how often the group meets, and the nature of these meetings. Bylaws help identify who is and who is not a member, who the organization is designed to serve, and what qualifications are necessary for membership.

Local groups differ in terms of membership models. Membership may be restricted to SIOP members, or membership could be defined broadly—including members with a variety of different degrees, practices, or disciplines (HR or OD, for example). Broader membership requirements offer a potentially larger membership base and a greater diversity of perspectives. Too much diversity, however, may make it hard to serve the needs of group members. For example, continuing education might be a goal for licensed I-O psychologists but less important for others. Bylaws should establish criteria (degrees, work experience, etc.) for membership and the mechanism for becoming a member.

Established groups reported having more detailed bylaws. Nascent groups were less likely to have written bylaws and to have embraced flexibility. Bylaws can help the organization become more consistent over time, and they will be required if the organization applies for not-for-profit status or opens a bank account.

Leadership and the Leadership Pipeline

Bylaws establish the leadership structure and the process of becoming a leader. A stable means of providing leadership for the group is essential for the continuity and sustainability of the group. With a single leader, the burden of operating the organization falls on that one person's shoulders. Even with a dedicated core group supporting the leader, it is hard to push action and the organization risks an early demise due to burnout of the leader. When there are very few "hands," completion of the work is dependent on those few hands. Leadership concentrated in a few hands may be necessary initially, but it creates problems when key people leave the organization. Having more members in leadership means that tasks can be delegated and the demands of running the organization spread among several members.

Several leadership pipeline models were discussed. A basic decision is the mechanism for selecting leaders: nomination, appointment, or election. Key to this would be the roles that need to be filled. Some suggested roles include president, vice president, treasurer, secretary, alumni/graduate student/undergraduate student coordinator, social media coordinator, IT support, website design and maintenance, and a person who schedules meetings and programs.

There are a variety of processes that organizations can use to maintain a leadership pipeline. Some organizations fill the pipeline by asking for a 2- to 4-year commitment. For example, individuals can be selected in advance as "elect," giving them time (6 months to a year) to learn the office that they will be holding the following year. In a different model, individuals are selected first to secretary, then move to treasurer, then vice president, then president, spending a year at each position. These and other methods of creating a leadership pipeline allow for continuity in the organization and ensure that organizational knowledge is retained, and that each office holder learns their role before

they assume the responsibilities and duties of that role. Leadership succession planning is a must, and there needs to be a pipeline of trained replacements.

Preserving Organizational Knowledge and Records

The primary concern discussed was the preservation of organizational knowledge and systems to make that knowledge available to all who have a need for that information. Documenting everything and establishing a stable and accessible storage system is key. If information is held in the head of one person, the organization is vulnerable to losing that information. When leadership roles get passed on, there should be a mechanism for passing on the knowledge and organizational "memory." One suggested system: a physical box of documents that can be handed off from one leader to the next. Another option is the use of Google Doc folders that serve as an archive for the information. Sensitive parts of the archive can be restricted to a limited group of individuals with a need to know by giving them security access. Critical pieces of information included items like ownership of the domain name for the organization's website, processes and procedures, and the rationale for past decisions. The structure should allow for the orderly passing of information to the next generation to help maintain the continuity of the organization.

Communication and Marketing

Communication between leadership and membership is critical. Organizations need to market their programs and disseminate information about upcoming events. Membership outreach, flyers, connecting with graduate programs, posting to social media, and reaching out directly to potentially interested practitioners can help to maintain engagement of current members and support recruitment of new members. Wild Apricot software was recommended as one tool for growing and retaining membership. It is useful for processing membership fees and for communicating with membership.

An active website (and perhaps presence on social media) will make your organization more visible. WordPress was identified as one tool to establish a web presence. Typical information available on a website are a description of the organization, identification of the officers, identification of sponsoring companies, posting of the bylaws, announcement of programs (and perhaps recordings of programs for later viewing), job postings, and a blog (which can provide online exposure for students). Absent updated information and modes of communication, membership will lose contact, then interest.

Fee Structure

Running a sustainable local group usually costs money unless the organization can find in-kind donors of meeting space and other services. Costs are associated with communication and marketing, maintaining a web presence, and running and presenting programs, if the organization chooses to engage in those activities. There is a necessary balance between keeping fees at a level to support the organization's activities and the level individuals are willing to invest to maintain their membership. For example, hosting a meeting can involve costs for the speaker, the venue, materials, AV support, and food and beverages. Venues vary in cost. Meetings held in hotel spaces often have a higher price tag than those held on a college campus.

Experience of more established organizations suggests that collecting an annual membership fee may be easier for both the organization and the members than collecting per-event fees. Annual fees generate a more predictable and stable revenue stream for the organization. Facilitating how members pay their fees will encourage the retention of members. One suggestion was an automatic membership renewal system, with opting out as an option rather than opting in, making it easier for members to continue membership. Fees per event may still be useful for the occasional visitor. The fee structure may include reduced fees for students. Ultimately, fees must be perceived as proportional to the value received.

Adding Value for Members

Membership Engagement

Networking and programming are the primary reasons most members give for joining local I-O groups. Involving members in the running of the organization is another way to increase engagement. Board membership is a plus on résumés, especially for students. Members establish ownership in the organization through their volunteer efforts. Here are some additional ideas that may help deliver value, increasing the likelihood that your members will stay active and engaged:

Networking

Networking is one of the most important reasons members give for joining. Experienced members want to visit with old friends, whereas those newer in the field want to develop contacts. Networking works better if you encourage interactions with and among new members as well as old friends. Younger members are often reluctant to initiate conversations with older members. It is important to find ways to break down these barriers to making new connections. Drawing members from a diverse background also adds to the value of the networking experience. Creating a group identity members can coalesce around will also help.

Programming

Programming is a key part of maintaining member engagement and retaining members. In a new organization, go for quick wins, like a prominent speaker addressing a current hot topic. This is also good advice for restarting and revitalizing programming each year. Do not let the programming get stale by repeating similar topics or avoiding controversial topics. Keeping the programming fresh and including controversial topics for open discussion will keep the interest and engagement of the members. Programming offers members the opportunity to stay current and to interact with experts in the field. Members in the group often have expertise and knowledge to share. Workshops that offer professional development (like training on R) are popular, quickly fill a classroom, and offer value to experienced practitioners as well as to students. Mentoring programs have been enthusiastically received, especially by students and less-experienced members.

The format of the program presentation is also important. In the last 2 years, local I-O groups have had an opportunity to experiment with virtual and hybrid formats, supplanting the in-person format that was typical previously. Virtual presentations can keep the costs down, eliminating the need to rent space or to provide food or refreshments. They can help in maintaining or reducing membership fees by keeping budgeting and spending at the right level. For in-person meetings, finding affordable, usable space is the issue. Hotel venues are pleasant and offer food and refreshment, but they tend to be expensive. University sponsors may be able to provide a location at a cheaper rate than commercial venues, as might other public venues. In fact, at least one local group started as a seminar in the school's I-O program, later developing into a local group that included professionals working in the field along with students.

Virtual meetings also present new ways to connect. Virtual meetings can attract members who are geographically dispersed, who would otherwise not make the trip to attend. Speakers may be available virtually who could not otherwise participate. With no transportation expenses, speakers may present for free or for a more modest fee. Networking can be encouraged if the first half hour of the meeting is designated for that purpose. Random breakout rooms create smaller, more intimate spaces (three to five members) that allow more uniform participation and engage more members. It is also important to note that Zoom fatigue can cause attendance to plummet. Groups have used hybrid meetings, with some members meeting in person and others joining in virtually. Varying the types of programming offered (for example, a half-day or full-day workshop) might make it easier for members to attend and for planners to coordinate instead of offering only short programs. Programming is one of the deliverables of the organization.

Continuing Education

About 20% of SIOP members are licensed, and hence are required to participate in continuing education (CE) to maintain their licenses. It is important to note that approval of the local licensing board is required for CE credits (or units; CEUs). If the CEUs are approved locally, they might not be accepted by licensing boards in other locations. Getting APA or SIOP sponsorship would probably alleviate the portability problem, although they might also impose additional requirements to meet specific objectives. For those requiring CEUs, the opportunity to earn them in a local group adds value to local-group membership and may alone justify the cost of the membership fee.

Afterword

We invite you to visit the SIOP Local I-O Groups Committee's Toolbox (which includes accumulated wisdom to help build a local I-O group, such as a bylaws template, a list of existing local I-O groups and leaders with contact information, additional resources for leaders, and an event calendar of committee activities) on the SIOP website. The link is:
https://www.siop.org/Portals/84/Local%20Group%20Toolkit%20Dec%202020.pdf