LOCAL I-O GROUPS TOOLKIT

How to Start & Maintain a Successful Local I-O Group

SIOP®

SOCIETY for INDUSTRIAL and ORGANIZATIONAL PSYCHOLOGY

LOCAL I-O GROUP
RELATIONS COMMITTEE

INTRODUCTION

Thank you for your interest in starting a local I-O group in your area! Your leadership is admired and deeply appreciated because 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.

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.

This toolkit was designed to provide key information and insights that can help you build a local I-O group that will thrive!

We are honored to play a role in your journey to fulfilling your vision in creating a lasting and successful local I-O community!

GETTING STARTED

As a founding member, you are asking 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. Ask yourself:
- Why am I creating this local I-O group?
- How do I want people to feel when attending our meetings or events, both during and after?
- Do I want my 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. Use this purpose statement to connect with others and start building coalitions so that you can recruit fellow founding leaders.

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.

RESOURCES FROM SIOP

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. Please submit your local group's general enterprise email and website (if applicable) to SIOP's Administrative Office at SIOP@siop.org. Please note that by submitting contact information to the Local I-O Group Relations committee it will be shared on SIOP's website and with other local leaders.

LinkedIn SIOP Group
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 group can be used for collaboration and information sharing. It is sponsored and maintained by SIOP's Local I-O Group Relations Committee. 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.

Quarterly local leader forum meetings
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.

TIP Features
The Local I-O Group Relations Committee hosts a quarterly TIP column that features the great work of local groups contributing to the field and communities.

POLICIES & BUDGETING

It is important to define your group's policies so that there is clarity with processes and procedures. You may want to consider establishing a charter and bylaws. Here are some example bylaws you might find helpful: ptcmw.org and http://www.gatewayio.org/page-1320412

Budget for the year by reviewing 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:
- Meeting Room/Venue
- Food
- Speaker costs (travel expenses – although many speakers are free)
- Website
- Online Group Management

Smaller groups on a budget can track membership on Excel or Google spreadsheets. Larger groups or those with larger budgets can consider member management infrastructure such as www.wildapricot.com.

USE OF TECH FOR GROUP MGMT

It is important for continuity, succession planning, and records management that you establish email addresses for your group/particular roles in the group rather than using people's personal emails to conduct group business.

Consider the use of Google for NonProfits (https://www.google.com/nonprofits/)

Benefits:
- Email retention - allows historical emails to be retained year to year
- File management - allows files to be accessible by all members
- Access issues - allows for easy access recovery to emails and files

Also:
- Can include professional email addresses at the nonprofit's domain
- allows for 100 participant video meetings (large enough for most groups to use for meetings)
- 30 GB cloud storage per user
- Security and management controls

ESTABLISHING PRESENCE

There are many ways in which you can promote your newly-formed local I-O group. Establish a presence with any (or a combination) of the below:
- Develop a web page to centralize information and assign one member to be responsible to maintain it.
- Consider a LinkedIn group, Google+, and/or a website. Some examples:
    -DAIOP-Dallas: https://www.linkedin.com/groups/2624489/
    -BAAP-Bay Area: https://www.linkedin.com/groups/2523213/profile
    -Other examples can be found at https://www.siop.org/Membership/Local-I-O-Groups
- Establish one member to be responsible for the website
- Submit your group's information to SIOP to be added to the I-O Groups Page:
    -Contact: SIOP's Administrative Office at SIOP@siop.org to have your group added to the page
- 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 member base.

Coordinate with SIOP and the Local I-O Group Relations Committee to publicize and promote your new group.
- You can have your local group listed on SIOP's website for members to find. We recommend you provide a specific email address for your local group as opposed to your personal email address.
- Your new group can be featured in the Local I-O Group quarterly TIP publication feature, which goes out to all SIOP members.
- Through SIOP, you can cross-network with other local groups to learn from and utilize their proven methods for gaining traction. You may even consider co-hosting events and activities with more established local groups that help you establish your presence.

ATTRACTING MEMBERS

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. Frequently, membership is grouped into two categories: Professional members and student members. Professional members may include people employed in academic, consulting, and corporate positions. 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 without a degree in I-O psychology be a member? For student members, factors such as considering field of study, graduate vs. undergraduate status, and type of enrollment (full-time or part-time) are often considered.

The personal networks of the founders and current members are great resources for attracting new members. Some use social media to attract and inform others about their group, create their own websites to share information, or utilize pre-existing websites, such as a university's website, to host group information. 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.

Example Groups
- ptcmw.org - Personnel Testing Council - Metropolitan Washington DC
- metroapppsych.com - Metropolitan New York Association for Applied Psychology (METRO)
- www.mppaw.org – Minnesota Professionals for Psychology Applied to Work (MPPAW)
- https://www.siop.org/Membership/Local-I-O-Groups - all groups

LEADERSHIP BOARD

Establish structure with a leadership board. The roles of the leadership board can vary by size and makeup of the group. At some point, you may want to consider creating a succession plan to ensure that the group can be driven forward in a way that does not solely rely on one specific individual.

Below are some example leadership board roles for a larger group:
- President: Overall guidance and member experience
- President-Elect: Special initiatives
- VP: Support President, invite/coordinate speakers, find sponsors
- Treasurer: Membership dues, payments to vendors, i.e., food, location, activities
- Executive Administrator: Recording meeting notes, sending event invites and group announcements, managing communications and marketing, coordinating catering

Regardless of formal structure, sharing responsibilities is one way to get others involved as volunteers and build support for the group. Groups may have formal structures that build succession whereby succession strategies are documented in the group's bylaws. 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.

MEMBERSHIP 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:
- METRO (in 2013 – 10 annual meetings): Annual dues of $120 Member / $50 Student
- Some have no cost, just payment for meal can suffice
- Some groups work with sponsors or accept in-kind contributions

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MEETING TYPE

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.

Below are some other examples for meetings and events:
- Career day Internship matching
- Mixers/Happy hours
- Joint meeting with other like-minded groups (Coaching, SHRM, ATD, etc.)
- Conference/Events or roundtable discussions

You could also 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. Typically, Tuesday through Thursday nights tend to be the most effective. Other groups prefer consistency. Keep in mind your target membership, and what best suites their schedules.

VENUE

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:
- Restaurant – 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).
- University – 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 – Can get expensive. While the room is typically inexpensive, many require a purchase of a certain amount in food.
- Meeting halls / Churches – Can be a less expensive alternative. However, you need to balance desirability of venue.
- Libraries – they are often free (or very low cost) and are also typically available to mass transit.
- Local company – Having a popular local company host events in its office or headquarters can be an exciting space for attendees.

Another thing to think about is 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 example:
- METRO (Large Group) same centralized location every meeting (recently university conference room).
- Some smaller groups change venues based on geographic location to facilitate people from all over the region.
- MPPAW traditionally has its meetings at the same location and same time every month.

Meeting Purpose
For many, a local group is a space to connect with current, former, and future colleagues. Other opportunities include collaboration, prospects, partnerships, and continuing education credits. With a clearly-defined purpose, decisions follow about group structure and who to include as members.

Below is a sample meeting format (METRO/MIOP):
- Begin with sign in, registration, payment if applicable.
- Have a social period for networking or ice-breaker activities. Some groups supply food or drinks or have them available.
- Call meeting to order after 30 minutes, starting with opening announcements by group's official and speaker introduction (5 minutes).
- Speaker (40-45 minutes).
- Questions and closing announcements ends 7:30 pm (10 minutes).
- Consult the SIOP Member events calendar for examples.

VIRTUAL MEETING VENUE

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.

Consider co-hosting virtual meetings with other local groups to maximize event attendance and reduce the lift of event planning by splitting tasks with one or more other local groups.

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 2-3 weeks in advance.
• Promote guest speakers with a longer lead time.
• Send meeting reminder a day before including the simple agenda and attachments
• Define meeting roles such as: Facilitator, Note taker, Chat monitor/Time keeper, & Tech support

Virtual meeting tips
Know the platform 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.
• 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.
• 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).

Use 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.

LAUNCHING YOUR GROUP

When you launch your group with its first meeting or event, you want to be sure set the tone. This can be done with a strong guest speaker in a formal setting 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.

Marketing
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.

Below are some other ways to promote your event:
- Word of mouth – Tell people to pass the word.
- Colleges and universities – Grad students offer a great opportunity to get early career people attending. Ideally, you want a balance of university and business people, but at the beginning, you are building the community. Ask professors to spread the word, as they will have a stronger professional network to attract people to attend the event. Some offer extra credit for attendance or sponsor class trips; this works at both undergraduate and graduate level.
- SIOP Local I-O Group Relations Committee maintains a listserv of Local Group Leaders. You can publicize virtual or hybrid events by sharing with the listserv at Local_IO_Group_Leaders@googlegroups.com.
- Local HR groups (ex, SHRM).
- Business contacts.
- Social Media: LinkedIn, Facebook, X (formerly known as Twitter), etc.

Other things to consider:
- If you are just starting out, not charging any membership or guest fees helps build your pool of potential event attendees and long-term followership.
- 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.

MAINTAINING & OPTIMIZING

Relationship with SIOP

Currently, there is no affiliation relationship with SIOP for local I-O groups. SIOP, however, does support the creation of local I-O groups and offers guidance by:

- Locating a local I-O group that may already exist (or identify one that previously existed).
- Facilitating introductions locally with I-O people who want help getting their group started.
- 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.
- 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 Credits

SIOP is available to partner with local and regional I-O organizations 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 the SIOP Administrative Office at SIOP@siop.org to discuss this program.

Note: having CE credits through SIOP carries APA accreditation (as SIOP is sanctioned through APA). Therefore you may use SIOP CE credits in lieu of any state licensing. Check with your state licensing board for clarification.

SIOP committees can partner with local I-O groups with 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, and to avoid issues if a leader is called away due to family situations or job changes. 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.
- Student Shadows: Provide real-world experience and exposure to students by having them shadow Board members conducting local group business (i.e., surveying membership) and establish a student pipeline of future board members.
- Make it easy to meet: Host the board meeting after a regularly scheduled meeting. Schedule your meetings for the year to get them on everyone's calendar.

MEMBER ENGAGEMENT

Welcome New Members so They Feel Like They Belong

Having seasoned, long-standing members throughout the years can make it harder for new members to fit in. Suggestions for mature groups to break down this barrier are to:

- Have current board members welcome and learn about new members.
- Invite speakers to dinner after the meeting and invite everyone to join.
- Ask if there are any new members and have them introduce themselves at each meeting.

Maintaining 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.

Keeping Meetings Fresh & Exciting

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

- Knowledge sharing and continuing education as well as socialization.
- Offer training sessions paired with networking/socialization activities.
- Have broader sharing of information across local 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 for you to get started 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!

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