TOOLKIT FOR LOCAL I-O GROUPS

Four Steps to Creating a Local I-O Group
Thank you for your interest in wanting to start a local I-O group in your area! Your leadership is admired and deeply appreciated because the only way we can truly grow I-O Psychology as a field with a strong following is with the leadership of people like you who believe in I-O Psychology’s ultimate goal to make workplaces better for all.

Before beginning your quest to create a local I-O group, be sure to check that one doesn’t already exist in your area. You can do this by going to http://my.siop.org/Resources/IOGroups and searching local I-O groups in your area. This page also offers great examples for you to pull from when starting your group!

If you find that a local I-O group in your area does not exist, then go ahead and continue your quest with this toolkit! This toolkit was designed to outline four key steps 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!

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

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Step 1: Define

Define your groups policies, norms, and target audience.

a) Establish Charter / Constitution / Bylaws
   i. Guiding principle suggestion: “A group created to apply evidence-based psychological principles into practice.”
   ii. Samples:
       1) Example Constitution: https://static1.squarespace.com/static/55f73aa1e4b0799db9576d01/t/58de6bd729687f3248264bdc/1490971607879/METRO+1983+ByLaws.pdf
       2) Example Bylaws: ptcmw.org

b) Defining Membership status
   i. E.g., professional, student, non-member, associate member
   ii. Defining target audience - Are your membership restrictions loose or restrictive?
       1) Restrictive – Ph.D. level Industrial-Organizational Psychologists Only
          a. Ex. Professors / I-O Psychologists working in Business
       2) More Liberal – Anyone with interest in I-O Psychology
          a. Ex. Certified Coaches, MA in I-O, MBAs, Certified Trainers, Students (Graduate or Undergraduate), etc.
       3) Recommendation - allow student members (graduate or undergraduate) – keeps meetings fresh and establishes a pipeline for membership
   iii. Academic or Business?
       1) Some groups cater only to Business, some groups cater more to Academics, however, the most successful groups have a balanced membership.
   iv. Membership Consideration - Do you consider headhunters as members?

c) Sample Groups
   i. ptcmw.org - Personnel Testing Council - Metropolitan Washington DC
   ii. metroapppsych.com - Metropolitan New York Association for Applied Psychology (METRO)
   iii. www.mppaw.org – Minnesota Professionals for Psychology Applied to Work (MPPAW)
Step 2: Organize

Organize your internal structure, budget, and basic meeting/membership logistics.

a) Establish a leadership structure (Board). Examples positions include:
   i. President (Overall guidance)
   ii. President-Elect (Special initiatives)
   iii. VP (Support President, invite/coordinate speakers)
   iv. Treasurer (Membership, payments to vendors ex. food, location, club activities)
   v. Executive Administrator/Secretary (Primary responsibilities meeting notes, invites for meetings, club announcements, communications and marketing)
   vi. Establish a succession plan to ensure your group’s sustainability. Keep in mind how to advance the group’s success in a way that does not solely rely on one specific individual to drive the group forward.

b) Establish committee/roles structure (roles and committees vary by size and makeup of club) – Typically this would be in subsequent years beyond launch year
   i. Recorder of Notes
   ii. Membership
   iii. Communications (may include Webmaster)
   iv. Newsletter
   v. Sponsorship
   vi. Catering

c) Amount of Dues/fees per membership status
   i. Payment schedule (monthly vs. yearly vs. per meeting)
   ii. Examples:
      1) METRO (2013-10 meetings annual) $120 Member / $50 Student
      2) MIOP (2013-4 meetings annual) $40 Member / $20 Student
      3) Some have no cost, your payment for meal may suffice
   iii. In the first few years, we recommended you do not charge for meetings if possible. Form a relationship with a business or university that will sponsor the event.
   iv. Will you charge for guests?
      1) For smaller groups, you should consider not charging for guests but monitor participation.

d) Meeting types (frequency, location, times, registration fees)
   i. Standard Meetings
      1) Breakfast meetings
      2) Luncheons
      3) Dinners
      4) Typically, meetings are either lunch or dinner meetings. Keep in mind accessibility by membership when deciding times
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ii. Alternative or Feature Meetings
   1) Career day / Internship matching
   2) Mixers/Happy hours
   3) Joint meeting with other like-minded groups (Coaching, SHRM, ASTD, etc.)
   4) Conference/Events
   5) Roundtable discussions

e) Venue
   i. Venue Type
      1) Restaurant – Some restaurants will let you meet for free provided you come on a less popular night. This will create revenue for the restaurant
      2) University – Partnering with a local university is frequently an affordable option.
      3) Hotel conference room – Can get expensive. While the room is typically cheap, many require a purchase of a certain amount in food.
      4) Meeting halls / Churches – Can be a cheap alternative. However, you need to balance desirability of venue.
      5) Local company – Having a local company host events in its office or headquarters can be an exciting space for attendees.

   ii. Consistency – Do you have the meeting in the same place or try to vary meeting location? Example:
      1) METRO (Large Group) same centralized location every meeting (recently university conference room)
      2) MIOP (Small Group) venue changes based on geographic location to facilitate people from all over the region
      3) MPPAW has its meetings at the same location and same time every month.

f) Meeting Format
   i. Are meetings only for networking or will there be a speaker?
      1) Typically, speakers drive people to come to the meetings, the networking will happen naturally
   ii. Sample Meeting Format (METRO/MIOP)
      1) Pre-kick off: Before official meeting start at 6:00 pm (30 minutes)
         a. Sign in, registration, payment if applicable
         b. Social period for networking or ice breaker activities
         c. Some clubs supply food or drinks or have them available
      2) Call to order at 6:30 pm followed by opening announcements by club official and speaker introduction (5 minutes)
      3) Speaker (40-45 minutes)
      4) Questions and closing announcements ends 7:30 pm (10 minutes)
      5) Consult the SIOP Member events calendar for examples.
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  g) Budget for the year
     i. Income
        1) Membership fees (if any)
        2) Guest / per meeting fees (if any)
        3) 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)
     ii. Expenses
        1) Meeting Room
        2) Food
        3) Speaker costs (travel expenses – although many speakers are free)
        4) Website
        5) Online Club Management
Step 3: Launch
Preparing for a successful launch of your local I-O group.

a) First meeting playbook
   i. Get a strong first speaker – speak to other I-O groups about recommended strong attractions
   ii. Advertise
      1) At least 3 months in advance – send monthly reminder then 1 month out every week
      2) Advertise avenues:
         a. Word of mouth – Tell people to pass the word
         b. 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 we are looking for a nice crowd. Ask professors to spread the word as well, 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)
         c. SIOP
            • SIOP has a calendar of events, you can have your meeting listed in the SIOP calendar. Some groups choose to have a webinar link as well.
              ➢ Calendar link: http://my.siop.org/Meetings/Local-Events
            • Contact the jrebar@siop.org to have your meetings added
   iii. DO NOT CHARGE for the first few meetings
   iv. Offer food for the first few meetings if possible
      1) Nothing draws a crowd like free food.
      2) This may mean you have to get money in advance or risk running in the red.
      3) Consider a relationship with a restaurant or bar. 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.
      4) 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.
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b) Establish presence
   i. Develop web page to centralize information
      1) Consider a LinkedIn group, Google+, and/or a website. Examples:
         a. DAIOP-Dallas: https://www.linkedin.com/groups/DAIOP-Dallas-Area-Industrial-Organizational-2624489/about
         b. BAAP-Bay Area: https://www.linkedin.com/groups/2523213/profile
         c. Other examples can be found at http://www.siop.org/IOGroups.aspx
      2) Establish one member responsible for the website
   ii. Submit link to SIOP to be added to the I-O Groups Page
      1) http://www.siop.org/IOGroups.aspx
      2) Contact: iarebar@siop.org to have your group added to the page
   iii. Create plan for outreach and member recruitment
   iv. Determine how often to email members (and about what)
      1) Take care with emailing, avoid sales type emails with product information, however, balance this with need to disseminate information that is useful to member base
Step 4: Maintain

*Develop momentum while also keeping people engaged.*

a) Membership Management
   i. Smaller groups or groups without the funds
      1) Tracking membership on spreadsheets would be effective
   ii. Larger groups - Member management infrastructure once group becomes more established. Web-based examples:
      a. [www.runmyclub.com](http://www.runmyclub.com)
      b. [www.wildapricot.com](http://www.wildapricot.com)

b) Survivability – what does your local group need
   i. Clear definition of who you are and what you’re about
      1) Consider drafting a compelling mission statement that will attract people who believe what you believe as it pertains to your group’s purpose.
   ii. Some groups are established to get continuing education credits for licensure
      1) *If your organization offers in-person educational sessions for which you would like to offer continuing education credit to psychologists, please contact Susan Rogers, Manager, Business Development,* at [srogers@siop.org](mailto:srogers@siop.org) or 419-353-0032 *to discuss this program.*
      2) *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.*
   iii. Need an educational component
   iv. Consider varying the day of week – Some people, especially students and professors have meetings/classes on certain days of the week, you don’t want to permanently exclude them. Typically, Tuesday through Thursday nights tend to be the most effective.
   v. Establish clear rules – *DO NOT MAKE THE MEETING AN AVENUE FOR SALES PITCHES*
      1) Nothing will kill a group faster than people feeling like the meeting is only about someone trying to sell them something
         a. However, companies like to talk about their products. Tell companies they can discuss their products within the context of research, however, they should never push their products or make the focus of the presentation they product and the superiority of their product.
      2) Most successful groups will discuss research, new topics in I-O, practical application of I-O work, etc.
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c) Relationship with SIOP

i. Currently, there is no affiliation relationship with SIOP for local groups
   1) SIOP does support the creation of Local I-O groups and will offer to help establish this group. SIOP can help by:
      a. Getting speakers
      b. Can locate a local I-O group that may already exist (or might used to have existed)
      c. Networking on local I-O people to help get the club started
      d. *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, Manager, Business Development at srogers@siop.org or 419-353-0032 to discuss this program.*

ci) Special note - Creating a group on the cheap – Some key notes about how to get started on a small budget:

i. Social Media - Use Linked in or similar to communicate with members

ii. Find a local venue - (restaurant/bar) that will allow you to meet for free (typically with the expectation or requirement of spending a certain amount of food)
   1) Can also consider partnering with a college or university. Some schools will sponsor and give reduced rates for professional groups that tie into their education programs
   2) Some colleges let you bring in your own food this is cheaper than catering

iii. Get speakers to speak for free - Many people are willing to speak for nothing to help promote our field. Typically, it is expected that you would pay for travel expenses if any were incurred.

iv. Don’t charge membership fees or guest fees to start
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!