

## *Tips on creating an effective Organization -*

### *Effective Meeting Planning:*

Careful planning is the secret to running an effective meeting. Poorly planned or unplanned meetings are typically viewed as boring, unproductive, and a waste of time. However, with proper planning any meeting can be productive and fun. The following steps will guide you in planning a meeting that is informative and enjoyable to all members.

#### **Before the meeting:**

- *Define the purpose of the meeting.* A meeting without a purpose is like a class without an instructor. The purpose is the reason why people come to the meetings. Without a purpose, members may feel that their time was wasted and it could discourage their return to the organization.

- *Develop an agenda.*

Sample Agenda:

1. Call to order
2. Correction and Approval of minutes from last meeting
3. Announcements
4. Officer/Committee Reports
5. Unfinished business
6. Special Announcements
7. Adjournment

- *Choose an appropriate meeting time.* Set a time limit and stick to it.

- *Distribute the agenda and any other materials before the meeting so that members can be prepared.*

- *The location of the meeting is very important.* Choose a location that is easy for members to find. Keep in mind that many students do not have their own means of transportation, so it is a good idea to stay on or close to campus. Be sure to select a location that will accommodate the size of your organization. Take time to check out the room prior to your meeting to ensure that the space is appropriate.

- *Be sure that everyone knows where and when the meeting will be held.* If possible, hold meetings at the same time and place every week.

#### **During the meeting:**

- *Greet members to make them feel welcome and be sure to introduce any new members.*

- *If possible, serve light refreshments.*

- *Start on time. End on time.*

- *Follow the agenda.*

- *Encourage discussion so that you get different ideas and viewpoints.*

\*\* Remember that the organization belongs to all of the members. When members see that their ideas have an impact on the decision-making process, their commitment to the organization is increased.

- *Keep the discussion on topic and moving towards an eventual decision.*
- *Keep minutes of the meeting for future reference in case a question or problem arises.*
- *The leader or facilitator should model leadership skills such as staying on task, listening, valuing members, and appreciating diverse points of view.*
- *Set a date and time for the next meeting.*

#### **After the meeting:**

- *Write up and distribute the minutes within 2-3 days.* Quick action reinforces the importance of the meeting.
- *Discuss any problems that may have surfaced during the meeting with officers so that improvements can be made.*
- *Follow up on delegated tasks.* Make sure that members understand and carry out their responsibilities.
- *Put unfinished business on the agenda for the next meeting.*
- *Most importantly, give recognition and appreciation to the members for excellent and timely progress!*

### ***ABC's of Program and Event Planning***

Program and event planning helps your organization achieve its goals, teach leadership skills, and foster camaraderie within your organization. However, it takes a great deal of planning and forethought prior to your event to ensure success. The following list will describe some basic programming tips that will help keep you on track.

#### **Concept**

- Determine the goals of the program. Examples: to bring a community together, to educate, to expose individuals to different points of view, to support other programs, to provide entertainment, to provide opportunities, and to socialize.
- Brainstorm the type of event and possible themes that will match your organizational goals. Examples: speaker, film, dance, fund raiser, trip, food, festival, athletic event, recreational tournament
- Decide on a program within your budget.
- Discuss the options within your organization and make a group decision.

#### **Planning**

- Date
  - ~ Find a convenient date for members in the group and for the entertainment/speaker(if applicable).
  - ~ Choose a date that does not conflict with other existing campus programs.
- Entertainment/Speaker
  - ~ Determine the type of entertainment/speaker you would like to sponsor.
  - ~ Research local, regional and national possibilities and negotiate a fee.

- Location
  - ~ Project the attendance to make sure that you have reserved an adequate facility.
  - ~ Determine the type of space that is needed for your event and any special needs you may have. Specific facility needs may include the need for: chairs, tables, lighting, sound, a stage, open space, a cooking area, an outdoor area, lecture hall, etc.
  
- Time
  - ~ Determine a convenient time for your targeted audience. For example, if you want culinary students to attend your program, find a time that works for them; Do not plan a program when major organizations have standing meetings.
  
- Budget
  - ~ Project all expenses and incomes such as fees, advertising, security, food, etc.
  - ~ Stay on budget.
  - ~ Brainstorm additional funding sources if you need more money.
  
- Publicity
  - ~ Design publicity strategies for targeted audiences.
  - ~ Design your promotion to fit the style and theme of the program. Be creative.
  - ~ Make the publicity neat and accurate. Include the name of the program, date, time, place, and ticket information if necessary.
  - ~ Distribute publicity in ample time. This allows people to plan ahead. Two weeks advance notice is ideal.
  
- Food
  - ~ Determine food needs. Are you planning a dinner or a reception? Who will cater this activity?
  
- Develop a list of tasks that need to occur before, during, and after the event; then determine who will be responsible for each one. For example: ushers, clean-up crew, stage crew, publicity, and hospitality.

### **On the day of the program**

- ~ Arrive early to check on room arrangements and the set up.
  - ~ Prepare a brief introduction statement. For example, "Welcome to tonight's performance sponsored by\_\_\_\_\_". If you are interested in having more events like this one, please talk to a representative of our organization."
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- Do an evaluation of the program at the next meeting.
    - ~ Determine if you have accomplished your program goal.
    - ~ Record both positive and negative results for future planning.
    - ~ Prepare financial statement of actual expenditures.

~ Send thank you notes to appropriate people.

### *Preparing a Budget*

#### *Setting Targets and Measuring Results*

Student organizations should become familiar with preparation of financial plans, budgets, and the benefits of using a budget as a management tool.

There are three primary purposes for developing a budget:

- To put the group's plans into monetary terms
- To provide a means of allocating limited resources among the organization's activities
- To aid in tracking the organization's actual revenues and expenditures against its goals

#### *Student organizations should budget their operations annually.*

The proper management of funds is important, especially when dealing with limited financial resources. Also, the more complex the group's objectives, such as managing multiple programs with different activities and funding sources, the more important the budget process becomes.

#### *Developing a Budget*

If your organization has been in operation for a fair amount of time, the easiest way to prepare a budget is to start by recording your last two or three years of actual financial data by year. A schedule prepared in this way will allow you to compare trends and identify major expense centers. It will also point out areas where your group is growing or declining and indicate areas where reductions and cost savings might be possible.

This historical information can then be used as a basis for preparing a current year budget forecast. The budget forecast is adjusted and modified from the historical data for projected major changes in revenues, programs, or expenditures. Obtain historical data from your organization's records to assist you in this process. If your organization does not have these records, begin creating a system now that can be used in the future.

#### *Choosing a Format*

You can choose among several methods of preparing and monitoring budgets. They can be organized by program and cost item, fund type, or solely by program. The most common format uses program and cost item formatting. This method provides a sufficient level of detail for analyzing the individual budgeted items and identifying cost item variances by categories, plus overall program variances.

#### *Summary*

While preparing a budget may seem excessive and cumbersome, any student organization that operates without a formal budgeting process cannot effectively manage or plan its operations. A properly prepared budget allows

even small organizations to identify potential problems and to take corrective action before they become major issues.

### ***Retaining Members***

Students stay with organized, dynamic groups that meet their personal goals for membership. Prospective members want to know that the organization is moving forward and will be successful in achieving its goals. Identifying the needs of the individual members is the key to having a strong organization with enthusiastic members. To remember why students join organizations and what helps retain them, just think of **GRAPE**.

#### *The Grape Principle:*

##### **G is for Growth**

Does your organization provide growth opportunities for all interested members? Are there opportunities for members to move into positions of leadership or are leadership opportunities usually “saved” for the senior members?

##### **R is for Recognition**

Do you recognize members when great things occur in your organization? Don't wait until the end of the year. People need and appreciate being recognized in a timely manner for their hard work and accomplishments. Recognition or awards that are presented may also serve as a motivating factor for other members who would like to achieve a certain level of success.

##### **A is for Achievement**

A sense of “team” achievement is important. Healthy organizations make sure that everyone feels as if they contributed to the success of the organization. When the organization is honored, it is important to realize that everyone has contributed and should have a feeling of accomplishment, from a member who may have done a simple task to the president of the organization.

##### **P is for Participation**

Can everyone participate in programs and events? Make sure your organization is open and willing to accept all student members' contributions regardless of how long they have been with the organization.

##### **E is for Enjoyment**

Volunteering and working hard in an organization has to be fun! If being part of a group isn't fun, why be a member? A student's time is valuable and there are many opportunities for involvement. Make sure one of the best options on campus is being involved with your organization!

## *Leadership Transition*

Implementing an effective officer transition for your student organization is a critical responsibility of outgoing leadership. Here are some reasons why transitioning is important:

- Provides the new leader with significant organizational knowledge.
- Minimizes the confusion of leadership change throughout the entire organization.
- Outgoing leaders gain a sense of accomplishment and closure.
- Helps the incoming leadership take with them some of the special expertise of the outgoing leaders.
- Increases the knowledge and confidence of the new leadership.
- Minimizes the loss of momentum and accomplishments of the organization.
- Provides a sense of continuity among the membership.

*The following are suggestions that may prove helpful in your leadership transition.*

### **Start Early**

- Identify potential leaders in your organization early in the year.
- Encourage these potential leaders through personal contact.
- Have the officers help develop skills by delegating responsibility to potential leaders.
- Share with them the benefits of leadership.
- Clarify job responsibilities.
- Let them know that the transition will be orderly and thorough.
- Model effective leadership styles.
- Create an organizational structure to support leadership development.
- Develop a mentoring program.
- Develop leadership notebooks.
- Create a shadowing program.
- Orient the new officers together with the outgoing officers so they can understand each other's roles and start building their team.
- Transfer the knowledge, information, and materials necessary for the new officers to function well.
- Ask outgoing officers what they wish someone had told them.

### **Make the Transition Smooth**

- Hold officer elections one month before installation to provide an overlap period for new and old officers to work together.
- Fill the gaps for new officers by asking yourself what information you wish someone had shared with you a year ago.
- Review and make current if necessary your constitution and bylaws to reflect changes made during your administration.
- Review the job descriptions to make sure they accurately describe the offices your organization needs and uses.

- Encourage informal meetings between incoming and outgoing officers.
- Plan a transition retreat.
- Review and update your mailing list or membership records.
- Leave behind files that might be helpful to the new person.
- Introduce incoming officers to advisors, SALD staff, the Student Organization Bank, other student leaders, and university administrators.
- Orient incoming officers to resources used in the past.

### **Add Your Personal Touches**

- Share the effective leadership qualities and skills you learned on the job.
- Share problems, helpful ideas, procedures and recommendations.
- Write and share reports containing traditions, ideas or completed projects, continuing projects and concerns, or ideas never carried out.
- Have the officers go through personal and organizational files together.
- Acquaint the new officers with physical environment, supplies, and equipment.

### **Share the Organization's Structure**

- Constitution and by-laws
- Job descriptions/role classifications
- Organizational goals and objectives
- Status reports on ongoing projects
- Evaluation of previous projects and programs
- Previous minutes and reports
- Resources and contact lists
- Financial books and records
- Mailing lists
- Historical records, scrapbooks, and equipment

## ***Fund Raising***

Consultation with the Office of Student Affairs staff in the early planning stages of fund raising activities can save time and effort and will ensure compliance with appropriate institutional regulations. Staff members are available to provide advice on planning strategies and the applicability of university regulations.

All funds generated by a Student Club/Organization will need to be placed in a bank account. Contact the Student Development coordinator for information regarding that process.

### ***Common Issues with Fund Raising***

- Fund raisers and solicitation can be conducted both inside and outside of campus
- Fund raisers may not be conducted for private gain of individuals or for-profit business.

- Contact the Student Development Coordinator with any questions regarding what can and can not be done for fund raising or ideas

All fund raising activities, and especially planned sales of t-shirts, mugs, caps, or any items that use the name of The Art Institutes International Minnesota or any of its trademark symbols, should be reviewed by the Student Affairs staff to ensure compliance with university regulations. Products that violate trademark or licensing regulations will not be approved for sale or distribution. Products in violation of copyright or trademark regulations may be confiscated. Early review and advice from staff members is highly recommended.