



OUT IN SCIENCE, TECHNOLOGY, ENGINEERING,  
AND MATHEMATICS INCORPORATED™

REVISION 1.0



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## **I. Letter from the President of oSTEM™ Incorporated**

Dear oSTEM members,

Welcome. Out in Science, Technology, Engineering & Mathematics™, also known as oSTEM™, is a national society that was built by students, for students.

The National Organization (oSTEM Incorporated) acts as a working board, and we are dedicated to serving you and to further growing the national society. We carry out a number of long-term projects for oSTEM, and we will continue to adapt and evolve to the ever-changing landscape of STEM education.

Drawing from a community of STEM leaders, the primary function of oSTEM is to educate and foster leadership among STEM students from LGBTQA communities. One goal is to cultivate top STEM talent and prepare each student for the workforce. With support from corporate, academic, and government institutions, we also hope to achieve our vision of being the most valued and trusted professional resource for LGBTQA students in the STEM fields.

In the coming years, many of you will hold leadership positions within your own chapters, and we hope you will also consider contributing at the national level as you near graduation. All of us at oSTEM Incorporated are dedicated to helping you and supporting your endeavors in whatever capacity we are able.

We hope you will find value in the oSTEM community, and we encourage you to reach out if you have questions, would like further direction, or require additional resources. Thank you for your interest and energy, and we are excited to welcome you into the oSTEM community.

Yours truly,

A handwritten signature in black ink that reads "Eric V. Patridge".

Eric V. Patridge, Ph.D.  
President of oSTEM Incorporated

## II. Motivation and Overview

Welcome to the Chapter Handbook for Out in Science, Technology, Engineering, and Mathematics. We have provided this resource to you, current and potential chapter leaders, as a sum total of the experiences of current and past oSTEM chapters as well as best practices in LGBTQA leadership. Ever since our organization's founding, our leaders across the country have clamored for all the advice and experience that the national organization could offer. This handbook is envisioned as the answer to the many, many questions that our students have had. In the following chapters, we seek to provide you with:

- A standard set of information about oSTEM, as well as about our chapters
- Standard leadership material, in a condensed form, that you may otherwise learn in academic courses, workshops at conferences, or elsewhere
- LGBTQA-specific leadership skills and advice for your chapter
- The experiences of other oSTEM chapters, so that you may avoid their setbacks and emulate their successes

This document is formatted around four main themes, each split into individual chapters, that address a variety of leadership topics, organizational suggestions, advice, and skills, all of which span from basic and novice to intermediate and advanced leadership tips.

First, we'll introduce you to our national organizational structure, so that you can see how your chapter fits into oSTEM. If you're thinking about founding a chapter, or in the process of doing so, here you'll find information about these basic steps and an overview of how to relate to the national board.

Next, we'll discuss procedures and logistics for running your chapter, and specifically about organizing your executive board. This includes information on positions, suggested roles and responsibilities, planning for the future, interacting effectively with external organizations such as corporate sponsors and your university's staff, and funding.

Then, we'll move away from the external, executive-board focused information, and concentrate on how to run your chapter internally as well as the services you provide your members. Section 3 discusses planning events and programs, knowing what your members need, facilitating meetings, recruiting and retaining members, event ideas, and conferences.

Finally, we'll provide an overview of electronic and personal resources for your chapter. This final section discusses technology and tools that we've found useful, as well as your social media presence and oSTEM branding. This section links to multiple appendices with more in-depth details about each tool.

We hope you enjoy using this handbook as much as we've enjoyed creating it.  
**DIVERSITY INNOVATES!**

Sincerely, The oSTEM Incorporated Chapter Handbook Team

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## **Section 1. All about the national oSTEM society**

This first section of the Chapter Handbook outlines everything related to the national organization, oSTEM Incorporated, as well as information about individual chapters. Included are lists of chapter requirements, guidelines on the use of our oSTEM name and logo, and a guide for creating new chapters.

### **1.1 Information about the National Organization**

When oSTEM was first conceived, our original few chapters only loosely collaborated, and were led independently. As we grew, we realized the need for increased coordination and communication. So, in 2009, the five original oSTEM chapters established oSTEM Incorporated as a non-profit entity, filing its articles of incorporation in New Haven, Connecticut. It had as its purpose to lead and serve the individual chapters, as opposed to strict governance. In December 2010, the group obtained Federal 501(c)(3) status, and the number of chapters rapidly grew to over 40 individual organizations in two short years.

The oSTEM society, in its current state, exists as a federation of independent chapters, linked through leadership (though not finances) to the national non-profit organization, oSTEM Incorporated. At the time of this writing, the national organization primarily consists of the national board, the coordinating body for all national operations, as well as those students and non-students working on various projects and initiatives with board members. Plans are in the works to develop a system of formal student membership with the national organization in a way that both recognizes chapters' individuality and also works with our sponsors' requirements for donations. Future revisions of this handbook will include organizational charts, as they are created.

Our student leaders rely on the national organization for resources, direction, and sustainability. In addition to these needs, another primary focus has been to grow and expand the organization, creating a community to serve our students. We provide resources to enable each chapter to focus on developing the local LGBTQA STEM communities across the nation.

In addition to providing workshops and other professional opportunities at national conferences, the national organization will continue to support its chapters by encouraging collaborations and through its shared resources, newsletters, and mentorships.

As oSTEM Incorporated transitions to a new leadership structure, our individual positions may change. Consequently, we've opted not to include position titles for most of the people in this section. Below is a list of the board members of the national organization, as well as their contact email addresses.



Eric V. Patridge, Ph.D., <i>President</i>	<a href="mailto:eric.patridge@ostem.org">eric.patridge@ostem.org</a>
Denise Conner	<a href="mailto:denise.conner@ostem.org">denise.conner@ostem.org</a>
A.P. Fritts	<a href="mailto:apfritts@ostem.org">apfritts@ostem.org</a>
Matt Feczko	<a href="mailto:matt.feczko@ostem.org">matt.feczko@ostem.org</a>
Jeffrey Loh	<a href="mailto:jeffrey.loh@ostem.org">jeffrey.loh@ostem.org</a>
LLLLL Long, Ph.D.	<a href="mailto:ellie.long@ostem.org">ellie.long@ostem.org</a>
Adam Stoffel	<a href="mailto:adam.stoffel@ostem.org">adam.stoffel@ostem.org</a>
Andrew P. (Drew) Sabelhaus	<a href="mailto:andrew.sabelhaus@ostem.org">andrew.sabelhaus@ostem.org</a>

Also, the following email addresses serve as aliases for various national organization functions. We ask that you use one of these if applicable, since it will automatically forward to the correct board member.

Travel and conference information	<a href="mailto:travel@ostem.org">travel@ostem.org</a>
Membership	<a href="mailto:membership@ostem.org">membership@ostem.org</a>
Finances	<a href="mailto:finance@ostem.org">finance@ostem.org</a>
Chapter Handbook	<a href="mailto:handbook@ostem.org">handbook@ostem.org</a>
Donations and Sponsorships	<a href="mailto:donate@ostem.org">donate@ostem.org</a>
General Information	<a href="mailto:info@ostem.org">info@ostem.org</a>

Interested in getting involved with the national organization? We're coordinating a variety of group projects that can use your talents and skills. If you're interested in helping with one of these projects, please contact our president to see what needs we currently have. We can almost always use extra help. However, our priority is on serving our chapters, and if you're currently serving in a role on a chapter executive board, we ask you to think critically about your time commitments: we'd prefer that you help your own students first and foremost. If you haven't served as a leader in some capacity on the local level, we suggest you first put your efforts into your local chapter.



## 1.2 Information about other oSTEM Chapters and Requirements

Currently, we have over 40 chapters working together across the nation. A short list of chapters is available on our website, [www.ostem.org](http://www.ostem.org), and is continuously updated as new chapters come into existence. A full list of all of our chapter's leaders, and their contact info as of September 2012, can be obtained by contacting the national board.

Additionally, starting in 2013, the national board has instituted a list of requirements for all existing chapters. If your chapter does not meet all of these, please contact the national board. Also, see Section 1.3 for the requirements for new chapters, which must also be met.

### 1.2.1 Requirements for All oSTEM Chapters

- 1 Each chapter must be in contact with the national organization through [membership@ostem.org](mailto:membership@ostem.org) at a minimum of once per semester.
- 2 Each chapter must follow the organizational guidelines for using the oSTEM logo, which has been trademarked (pending approval). Guidelines are forthcoming, but please ask the national board if you have any questions about current usage.
- 3 Within the first week of your operating semester, provide the national organization with the following updates on your chapter. As of Spring 2013, provide this information in email for to [membership@ostem.org](mailto:membership@ostem.org). An online system for providing this information in standardized form on [www.ostem.org](http://www.ostem.org) will be forthcoming as we continue to expand.
  - a A current information list for your chapter's officers, advisors, and/or executive board members, specifically mentioning the following:
    - i Name
    - ii Position Title
    - iii Email Address
    - iv Academic Standing (Year or Semester)
    - v Major(s) and any minor(s)
    - vi Expected Graduation Date
  - b Primary email address for the chapter
  - c Social media account names/links (Google+, Facebook, LinkedIn, etc) if applicable
  - d Website URL for your chapter, if applicable
- 4 Each chapter must submit an end-of-semester report to the national organization (again, currently through [membership@ostem.org](mailto:membership@ostem.org)) containing, at a minimum, the following information:
  - a The results of any leadership changes (such as elections), and updates to the information list provided in (3a)
  - b Statistics and Data on your chapter membership:
    - i Number of people on your group email listserv

- ii Number of participants at meetings: provide an average if more fine-grained data is not available
    - iii Other relevant quantifiable information
  - c Any sponsorships received since the last report
  - d Any awards or recognitions given to the chapter (or significant awards given to chapter membership)
  - e Summaries of any past or future programs that your chapter would like to highlight
- 5 Payment of Annual Dues. However, as of Spring 2013, these are at \$0 per year.
- 6 Make every effort to send two or more people to oSTEM's Annual National Meeting. If at least two members from your chapter are not able attend, you should plan a teleconference through [membership@ostem.org](mailto:membership@ostem.org) to discuss your plans for the upcoming semester with the national organization.
- 7 In all events, programs, communications, or any other activities, each chapter must be inclusive of diverse populations according to the national organization's mission statement.
  - a Note that this includes, but is not limited to, people who identify as gay, lesbian, bisexual, transgender, queer, or allies.
  - b If your chapter has any questions about specific ways to meet this requirement, including specific words, phrases, and actions, don't hesitate to contact the national board. Also, see Section 3 of this handbook for information on running inclusive meetings and events.

## 1.3 Forming a new oSTEM Chapter

If you're considering starting an oSTEM chapter, we're extremely excited for the rewarding experience that you're about to undertake! This section deals specifically with establishing your new chapter and getting it running effectively. Remember that each section of this handbook has valuable information for specific aspects of your chapter, and these may also be useful to you as you start your journey forward with oSTEM Incorporated.

Before we delve into specific steps, we must mention one overarching principle that all oSTEM chapters must abide by: inclusion of diversity. When starting your chapter, it is imperative that you and your fellow leaders work toward including all people, especially those marginalized in our communities by their gender identity, gender expression, ethnicity or origin, or other traits. See our mission statement for a formal statement of this idea. If you're wondering how to be inclusive, start by checking out the information in Section 3 about using trans-inclusive language when running meetings. As always, don't hesitate to reach out to the national organization for more information or examples.

### 1.3.1 What to expect

Starting a new organization is an exciting and turbulent time in any young leader's career. In the experience of many of our leaders, getting a chapter off the ground could take anywhere from a semester to over a year, so don't worry if your oSTEM chapter is not functioning smoothly right at the beginning. Expect that you'll learn many new things through the process - both about leadership, about others, and about your own skills. It will be worth it, we promise.

### 1.3.2 New Chapter Requirements

oSTEM Incorporated has a small set of requirements for new chapters, in addition to those listed above for all chapters. Take these into consideration as you start following all the information below. Remember that you may not meet all of these requirements just yet, but when you do, we'll include you as an official oSTEM chapter.

New chapters must meet the following requirements to be accepted as an official oSTEM chapter, in addition to those required of all chapters (existing and new) listed above. Please contact the national board to inquire about any updates to this process.

- 1 New chapters must have at least three officers and one advisor.
- 2 New chapters must become a registered student organization at your college or university.

- 3 New chapters must abide by all school regulations and all local, state, and federal laws, including tax laws.
- 4 New chapters must establish a listserv as well as one additional online form of communication. Examples include a general group website and/or a Facebook group.
- 5 New chapters must send an email to [membership@ostem.org](mailto:membership@ostem.org) requesting an application and chapter logo. Whenever possible, include confirmation of your acceptance as a registered student organization by your college or university.
- 6 New chapters must review and follow all organizational guidelines for use of the new chapter logo.

Note that your college or university may request a letter or some other form of communication from oSTEM Incorporated as part of the student organization certification process. We're happy to oblige all requests. Please contact [membership@ostem.org](mailto:membership@ostem.org) if such a need arises.

### 1.3.3 First Steps

Taking the first steps to starting an oSTEM chapter can occur any number of ways. Start by gauging the level of interest in your communities. If you know other students who you think may want to help start your chapter (remember: allies are more than welcome in our community), talk to them. If your network is not very large, that's fine too - you'll just have to be sure to advertise. Many chapters have started from any combination of these beginnings.

Usually, finding a potential advisor early in this process can help quite a bit. This person could be faculty or staff, depending on the circumstances and your university's regulations. Early on, they can be very useful for specific advice about working with your university. There are so many ways to go about finding an advisor, but no matter the process, be sure that your expectations match: If you feel you'll need guidance on a weekly basis, be sure your advisor has time for your chapter. oSTEM Incorporated does not have any requirements for the advisor position, so the responsibilities of this person will have to be discussed between you two.

If you have a cohort of students that you think may be able to form the beginnings of your chapter, it may be a good idea to hold a small meeting to talk more about what each person would expect from creating an oSTEM chapter. This first small meeting is enhanced if you can bring food, or have an advisor attend. Since this wouldn't be advertised widely, your meeting venue could be very informal.

Next, you'll want to host a larger Interest Meeting, preceded with lots of advertising. See Section 3 for advertising tips. A typical agenda for this meeting would consist of a brief description of oSTEM and what we do nationally, a discussion about what the attendees might want to get out of membership, as well as the specific purposes your chapter might serve. This

handbook goes into detail about each of these in various topics. A few things to remember at this interest meeting are:

- Be sure to make it inclusive. See our tips for trans\* inclusiveness in Section 3.
- Food is helpful, if you can have it at your venue. Again, see inclusive tips for food in Section 3, such as those for vegan attendees.
- Try to cultivate a friendly and informal atmosphere. Putting chairs in a circle may help conversation. Also, remember to have an icebreaker near the beginning of the meeting to share names, pronouns, majors, etc.
- Be sure to get the contact information of the attendees for future communications. In particular, you'll want to plan on starting to send out emails, so a sign-in sheet with a space for email addresses is a good idea.
- If you have time, and if it's feasible, talk about scheduling regular meetings with your group. Most chapters meet anywhere from weekly to every 3 weeks. If your group is large, consider using an offline scheduling tool such as Doodle, described in Section 4.
- Finally, make sure to note specific individuals you think would be very helpful in getting the group up and running and make sure to set up private one-on-one discussions with them.

At the interest meeting, if you think it's appropriate, talk about forming an executive board. See if any of the attendees would be interested in taking on the positions described in Section 2. Start up contact with them to host executive board meetings. As your executive board forms, remember that it's usually necessary to talk to everyone at least once per week; you should find a time that works for everyone and get on schedule as soon as possible. See Section 2 for more information about electing versus appointing leaders. Remember, your chapter needs a minimum of three board members to be recognized by oSTEM Incorporated.

When you have these basics in place, obtain recognition from your university by becoming a registered student organization. These requirements vary from school to school, but commonly will include forming a constitution and having a mission statement. Templates for these can be found in appendices of this handbook. Note that your mission statement does not necessarily have to be exactly that of the national organization, but we do ask you to keep the same general vision and spirit of our organization. Occasionally, your university may require a letter from oSTEM incorporated; we're happy to oblige. Talk to your advisor about other requirements, and don't forget that we're here to help in any way we can.

For most contact with the national board about chapter business, use [membership@ostem.org](mailto:membership@ostem.org). Keep in touch with us, we love to hear how you're doing during this process.

Finally, oSTEM Incorporated has some guidelines for choosing the official name that your chapter should take. You're welcome to name your chapter as you'd like within some reasonable bounds, which are:

- Chapters should be named in the form of “oSTEM” + “at/@” + “School Name”.
- We ask you not to use your school’s acronym in your official name if at all possible.
- You’re welcome to choose whatever non-acronym form you’d like, however. If your school is a flagship institution, some chapters choose to have just the state’s name in their title.

Some examples of chapter names that are in use currently are “oSTEM @ Maryland”, “oSTEM @ UC Berkeley”, and “oSTEM at Texas.” You may want to talk through this naming decision with your executive board, or have a vote on it.

### 1.3.4 Resources for your new chapter

Alongside the many resources provided in this handbook, the national organization is working on building out other capabilities in the future. Keep an eye out for website updates and more electronic resources. For now, see Appendix B for the references used in this handbook, many of which are linked to on our open-access Google Drive.

This handbook is partially grown out of other documents that oSTEM Incorporated has been sharing online. If you think we’re missing some information in this handbook that has been present before in other places, let us know.

As a quick note, there are a strict set of policies forthcoming about the use of the oSTEM logo, as well as the oSTEM name, trademark, and its derivatives (OUT in STEM, for example.) Until then, please contact the national organization about our logo, our name, and their use. A few guidelines for now:

- Please use “oSTEM Incorporated” in place of “oSTEM Inc” when talking about the incorporated nonprofit organization, what we here call the “national organization.”
- Please have us make a logo for you. This should be part of your email to [membership@ostem.org](mailto:membership@ostem.org). It uses a very specific font and coloring. Also, please don’t edit the logo once we send it to your chapter.

### 1.3.5 Keeping it going

The first semester or two can be tumultuous. We highly suggest that you first concentrate on recruiting and retaining members, so that your organization can build momentum. However, to do this, you need to provide interesting events that potential members want to attend. So, check out Section 3 of this handbook for ideas.

Another significant goal for your first semester should be starting up an email list and building mechanisms for an online presence. Google+ and Facebook groups or pages often facilitate community forming around your fledgling organization. Also, think about creating a website. oSTEM Incorporated may be able to provide server space if your university does not. You can use all of these media to advertise and to keep track of your members.

We want to emphasize that stability should be your top priority at the beginning. It's best to get a base of members and a working executive board before working on larger, loftier goals such as fundraising and significant events (although these may be necessary to generate interest, so keep your options open). Sustainability in your organizational structure is key.

### **1.3.6 Don't get discouraged**

You may run into roadblocks when forming your chapter. If you have trouble finding students, re-evaluate your advertising, and look through this handbook for more suggestions. If you run into issues with the administration, again search through this handbook for tips - but also, let oSTEM Incorporated know if any issues of discrimination arise. Again, we promise that leading an amazing new organization will be worth it!

## Section 2. Chapter Executive Boards: Procedures and Logistics

The rest of this handbook is designed to provide general leadership information and advice to all of our current student leaders. Section 2 primarily addresses procedures and logistics for your chapter, and in particular for your executive board. In this section, you can find information about organizational structure, finances, interfacing with other organizations, and other tips. See Section 3 for material about working with your members.

### 2.1 Leadership Structure and Chapter Longevity

As the leader of an oSTEM chapter, your organization's future should be kept in mind throughout your tenure. Seeing your chapter remain successful and active after you leave can be one of the most rewarding parts of being an officer.

Traditional organizations will have, at a minimum, a president, a vice president, a treasurer, and a secretary. President, treasurer, and secretary represent the functions of any organization that are critical to preserving the organization's existence. In this structure, the vice president is important because none of the other roles have any slack in their duties. The responsibilities of the treasurer are just as important as the responsibilities of the president; neither set of responsibilities should be compromised so that one officer can attend to the responsibilities of the other. The vice president creates the slack that the other officers would never want to be without.

There are many additional positions that can be created as the leadership team expands, depending on the needs of the chapter. Alternatively, you can double up on roles. Because of the importance and time-sensitive nature of the treasurer's responsibilities, for example, an organization can greatly benefit from having two co-treasurers work as a team.

#### 2.1.1 Positions and Responsibilities

In this section, we've split up the categories of roles into those traditionally required as a bare minimum for a functional organization, in contrast to roles which simply expand the efficiency of an executive board. Don't forget that these are purely suggestions, and if your chapter has a new idea for a position, please let us know so that the national organization can share it with others.



### 2.1.1.1 Core Positions

- **President:** The president serves as the principal motive power within your leadership team. The president should serve as a spokesperson and representative of the organization. The president may also provide the vision and goals for the chapter's future, and help the organization come to consensus when disagreement occurs.
- **Vice President:** The vice president should supervise the activities of the organization's committees and projects. A vice president might also coordinate recruitment, training, and other day-to-day chapter operations. This person would be in charge in the absence of the president. Ideally the vice-president's roles and responsibilities would be identical to the president with the understanding that the president makes the final decision.
- **Treasurer:** The treasurer should establish and maintain a budget for the chapter and report on the organization's financial situation regularly. This person should also be responsible for tracking income and expenses and manage tax and banking information.
- **Secretary:** The secretary records and distributes correspondence, minutes, and other information as necessary. This person should also maintain accurate membership and committee rosters and maintain thorough files and records as needed by the organization's operations.

### 2.1.1.2 Additional Positions

- **Corporate Relations Director:** The corporate relations director builds and maintains relationships with the business community, including sponsors, sponsorship leads, and other interested businesses. The corporate relations director must understand the needs of each business, as well as the organization's own members, in order to find ways to meet the needs of the membership by meeting the needs of the businesses.
- **Publicity Coordinator:** The publicity coordinator may be responsible for social media, the chapter's website, posters and flyers, a newsletter, or other publicity, as determined by your chapter. Because consistent publicity needs to occur before each event, this is a great role for someone who can contribute a consistent amount of time to the organization each week.
- **Event Planner:** Depending on the needs and schedule of your organization, the event planner may be responsible for the logistics of every general meeting. If the routine logistics are functioning well without a dedicated event planner, then having a "special events coordinator" to focus on trying out new social or service events can give your chapter an extra boost.

## 2.1.2 Titles and Responsibilities

The defining characteristic of each position is the set of responsibilities that it entails. Each responsibility that is necessary for your organization to function should be identified and assumed by a specific officer. Additional responsibilities can then be assumed as the officer team has the available personpower.

The titles listed above for the individuals are perhaps the “classic” titles for student organizations, but there are other title conventions. For example, an officer team with 6-8 officers might not need the traditional vice president role, and instead give everyone a “vice president title” such as vice president of finance (treasurer) or vice president of communication or administration (secretary). A title convention along these lines can also help emphasize that everyone on the team is equal.

By using titles that recognize that everyone’s position is of equal importance and significance, it also helps remind people to think beyond their core responsibilities. Innovation is essential to the vitality of any organization, and should be on every officer’s mind. So long as an officer is meeting all of their core responsibilities, they should remain free to try out new projects and ideas. Discovering what doesn’t work is an important part of innovation; it only becomes a failure when the officer’s core responsibilities are compromised as a result. Conversely, if the officer’s core responsibilities are compromised in efforts that prove successful, the successful experiment does not negate the failure of the core responsibilities of the officer.

## 2.1.3 Chapter Longevity

Though it’s hard to imagine, one day all of your leaders will graduate from your institution and pass on your chapter to new students. This section details the intricacies of keeping a chapter on a sustainable path for future growth, which is important for all leaders at all times in your organization’s life cycle.

### *2.1.3.1 Balancing Social and Professional Leadership*

As an oSTEM leader, properly balancing your professionalism and your relationships with each of your chapter’s members is integral to maintaining a healthy and efficient organization. Your organization will need a balance of fun, social activities and business in order to be sustainable. Plan social events where your member can focus less on business and more on enjoying the company of other members. This will make your organization more appealing to current members and prospective new members.

oSTEM members come from a variety of fields and specializations. It is important to recognize each member's strengths and delegate accordingly. Doing so will be key in showing that you recognize the contribution they bring and are appreciative of their talents.

Remember as you lead your organization that each member has their own classes, jobs, and other responsibilities that will need to take priority over the organization at times. Recognizing this fact and building an agenda holistically within your members' lives will be both efficient and meaningful to your relationships with each other. Be sure to keep the discussion about time commitments open throughout each semester; your officers' lives situations could be changing.

Finally, remember to practice sustainability in your own life. It's common for chapter presidents to put in a disproportionate amount of work, sometimes to the detriment of their academics or health. Take care of yourself, and your community will take care of you. Remember to use your vice president for balancing your workload if the need arises.

#### *2.1.3.2 Documenting Your Activities*

Maintaining records about your organization's projects and endeavors throughout the year will help you track the results of each activity to help future planners of similar events build on your success. Remember to check out Section 3.1 for information on assessing events.

You should document a project's goals and objectives, expenses, planning activities, contact names and details, and information about the outcome. Include information about how and why money was spent and who contributed to the success of your activity. Whether or not the activity or event was a success, document your theories as to why. Again, see Section 3.1 for more tips.

For events, consider using a standardized event summary template. The template should include the event name and time and the names of those involved in planning. Provide a breakdown of costs and funding sources. After the event is finished, record the approximate number of attendees and any demographic data you may have collected. Ensure that any advertising and promotional materials are saved and available for future use.

For all projects, providing an assessment of challenges and accomplishments that came about during each stage of planning and execution allows people to recreate the success in the future. Make note of any information that may help future leaders understand what you did and make suggestions for similar projects or events in the future.

### *2.1.3.3 Troubleshooting Your Chapter's Leadership*

A variety of obstacles can require troubleshooting, including disagreements among officers or members, the failure of an officer to follow through on their commitments, or an unexpected vacancy in a position. It is inevitable that some of these obstacles will arise from time to time, what matters is how they are dealt with.

Your organization's constitution and bylaws will help guide your organization through these difficult situations. The oSTEM National Organization provides a template for chapter constitutions and bylaws to use as a resource as you are developing your own. Many universities also provide assistance with creating these documents.

The officer team is in the best position to function as a team when every officer know what each officer is responsible for, so use these documents as an opportunity to delineate what each officer's responsibilities are. At the same time, make sure the organization stays flexible in adjusting responsibilities so that each position is tailored to the officer, as well as ensuring that all your organization's logistical needs are met. Ensuring that each officer gets more out of the organization than they put into it is essential to keeping officers engaged. Knowing what each officer is responsible for facilitates collaboration when a task involves overlapping responsibilities.

When conflicts do arise, they can potentially fracture a chapter. Having bylaws that provide a system for resolving disagreements and filling vacancies can be critical to resolving conflict without fracturing your organization. For this reason, we strongly encourage each chapter to make writing such bylaws a top priority when the chapter is founded. Remember to keep lines of communication open between all your officers as well as your chapter advisor.

## 2.2 Collaborating with other student organizations

As a national non-profit with numerous resources, the oSTEM National Organization can assist chapters in their programming. However, there is no greater asset for your chapter than fellow student organizations and student resource centers at your university. By successfully collaborating with other student organizations, you can improve your chapter's visibility, increase membership, and provide many networking possibilities.

Always consider the possibility that other organizations may want to contribute to or participate in an event that your chapter is planning. Collaboration can multiply your personpower and funds to help accomplish your goals.

Identify and solicit organizations whose goals and skills complement those of your own organization or your specific event. Your university may have mailing lists or other resources through which you can reach out to the leaders of other student organizations. Be sure to mention how collaboration will be a benefit to their goals and members as well as your own.

Once you have found a collaborator, allow them the opportunity to genuinely provide input and direction to the activity or event. Share resources so that each organization is best able to reach their goals. Discuss your goals with them so that they can do the same. Don't be afraid to discuss potential hang-ups with your collaborator; it will ensure the planning and execution are successful by avoiding conflict.

## 2.3 Working with Businesses, Sponsors, and Partners

All organizations need funding to provide their members and communities with programming. Your oSTEM chapter is no different. Securing sponsors provides visibility to your organization and the funding you need to function and succeed.

When you approach sponsors, provide clear benefits to them. For many businesses, this benefit is the opportunity to recruit in your organization. You might consider giving them the opportunity to speak with your members or send them a recruiting message. If you do provide the opportunity to contact your membership, respect their privacy. For example, don't release their contact details; instead, have the sponsor provide you with a message to disseminate. An organization may also be willing to contribute in exchange for visibility in your advertising or publications. Occasionally, a sponsor may be willing to support your organization simply because your mission aligns with their own.

By giving your sponsorship packet to recruiters, you are asking for support - whether it be in the form of funding, giveaways, collaboration for an event, or in-kind donations. In order to be sponsored, it is important to efficiently and clearly state what you will provide them. As before, these benefits could involve branding, other visibility, or resumes for potential internships. Similar to your own resume and elevator pitch, your chapter's corporate sponsorship guide is an opportunity to "sell" your chapter.

### 2.3.1 Understanding Employers

Many employers will look to student organizations as a way to enhance their on-campus recruiting efforts. This can be driven by two different sources within the employer, each with its own motivations and resources. First, large employers often have a "University Recruiting" team which is composed of full-time recruiters responsible for hiring for entry-level positions. Second, almost all major employers have an LGBT employee resource group ("ERG"). Some companies refer to these as affinity groups, but much like an LGBTQA student organization, it is composed of LGBT-identifying employees and allies from across the company who choose to come together for their own reasons.

#### *2.3.1.1 The Needs of University Recruiting*

In a typical University Recruiting structure, recruiters are assigned to recruit from specific universities and depending on the size of the company, for specific divisions or types of positions. The recruiter will typically have a quota for hiring a certain number of students, and a budget. These recruiters generally seek two things from student organizations: (1) distribution of

information about positions they are hiring for; and (2) a preference amongst students for their employer when students are choosing between multiple job offers.

The first thing the recruiter needs to do is get students to apply, which requires building an awareness of available positions amongst qualified students, and making the position sound desirable. The more positive “buzz” the student organization can create for the employer, the easier this will be for the recruiter. Recruiters take many different approaches, from large presentations to smaller networking events such as students joining some employees for a networking dinner. The latter may have a social feel to it, but the recruiter’s goal is still for the employee to spend at least a few minutes talking about their job.

Once the company has extended an offer to a student, the recruiter wants the student to accept, because as soon as enough students brought in by the recruiter accept an offer, the recruiter has met their quota and can focus on other responsibilities. Where a student will have competing offers for similar positions, the appearance that the employer is more LGBT-friendly than the competition can be a major factor in which offer the student will accept. This is typically where your oSTEM chapter has the most to offer, especially if the recruiter is not as concerned with distributing information.

#### *2.3.1.2 The Needs of the Employee Resource Group*

The ERG is an extracurricular group for employees. Each employee will have their own motivation for being in the group. Often, however, they will have two shared interests: (1) increasing the number of co-workers that are LGBT-identifying; and (2) mentoring younger generations of LGBT-identifying students preparing to enter the professional world.

Aside from those commonalities, each company will be different in so many ways that it’s best not to make assumptions about the specifics of the ERG. At some companies, the effort is entirely employee driven, and the employer is simply appeasing the employees so that they get back to focusing on work. At other companies, the ERG will be employer-driven: the employer may have identified one or more competitive advantages that an ERG can offer them, and the employer may have actively created the group. In either event, the ERG may or may not have a budget, and if they do, their spending priorities are not generally recruiting. That said, the ERG often has some influence over the recruiters.

#### *2.3.1.3 The Corporate Sponsorship Guide*

The corporate sponsorship guides has several very different, and very important, roles in developing relationships with sponsors. In general, this guide will be a document that your chapter creates which is shared with prospective corporate partners or sponsors.

The corporate sponsorship guide demonstrates what your chapter has to offer to a potential sponsor. Substantively, talk about the success your organization has had in the past. It can be worthwhile to include a few aspirations for what you want to do with sponsors, but for the most part, if someone is reading through the guide, they want to know what your chapter has already proven to already be capable of. Most of the people who receive your sponsorship guide, however, are going to flip through it without reading much of what it has to say. They will see generally how professional it looks, which is why appearance is just as important as substance.

The corporate sponsorship guide is an invitation to negotiate. Each company has its own recruiting strategy and its own ideas for what it wants to do with your chapter. They may be interested in your ideas as well. Once you have the attention of the recruiter or other person who will advocate for your organization internally at the company, the sponsorship guide should take a backseat for a while. Focus your discussions on what this particular company wants and what this particular person at the company wants. Find the best way to meet their needs while serving the needs of your own organization. This doesn't need to match a specific offering on the corporate sponsorship guide.

The corporate sponsorship guide is a record. Whomever it is at the company that authorizes spending money on your chapter will need to document the benefit that the company received for that money. The corporate sponsorship guide needs to show both that the amount they spent was the minimum to obtain the benefits they sought, and also that there were more expensive options which they did not choose. If a corporation chooses the most expensive offering you have, it might be time to develop some more expensive offerings.

If you do negotiate a sponsorship arrangement that is not already a part of your sponsorship guide, be able to provide the sponsor with a written record of what they received. They may need this for internal records or to justify continuing their sponsorship in the future. Consider incorporating this new arrangement into your sponsorship guide for the future.

#### *2.3.1.4 Maintaining Relationships with Corporate Sponsors*

At most corporations, you will want to maintain two relationships, one with the ERG (if they have one) and another with University Recruiting. Often, that the ERG has the most interest in supporting your oSTEM chapter, but University Recruiting has the budget. Sometimes, the recruiter might only be sponsoring your organization to appease the ERG. Such internal politics should be left to the company; employees should work these things out internally.

The key to developing a strong relationship is to be responsive. The more likely the other person thinks it is that they will receive a quick response from you, the more likely they are to contact you in the first place. An ERG member may be choosing amongst several uses of their



personal time, and how likely they spend it writing you an email depends on their expectations of your response. A recruiter might have an opportunity for which the many diversity student organizations are interchangeable. In this sense, you may be competing against the offerings of other student organizations. Your responsiveness is your advantage.

The more often that you can respond within 5 minutes and turn the email from an electronic letter into an instant message, the better. But always respond within 24 hours, even if you don't have an answer for them. In this case, it's absolutely fine to say, "I'm still waiting on X before I know the answer to that. I should have an answer early next week." Just make sure to follow up with them, even if you still don't have an answer. The point is to make them confident that you are organized and on top of things so that they don't have to be.

### **2.3.2 Other Community Partners**

Other community organizations including local business and nonprofit organizations can also be great sources of support, and each one may have their own reasons for supporting your organization.

Once you have secured a sponsor, whether it be a large corporation, nonprofit, small business, or individual, be sure that you thank them for their support and follow through on your promises to them. A happy sponsor is one that is likely to contribute again in the future, further ensuring the continued success of your organization. More details on the financial details of donations are provided in Chapter 6 of this section: "Money, Money, Money."

## 2.4 Communicating with your school administrators and staff

Having a good relationship with your school or university administrators and staff is essential to any student organization. These people can implement and enforce policies at your school, provide your group with funding, and be a gateway to valuable connections.

The type of relationship the university has with student organizations will vary from one university to the next. Some universities view organizations as a subordinate component of the university, in which case they are likely to assert a right to say what the organization can and cannot do, and may require money to be held in an on-campus account. Other universities view organizations as independent creatures created by students that the university allows to operate using on-campus resources. These universities generally only dictate what can be done on-campus. Many schools are a mixture of these two paradigms.

### 2.4.1 Understanding Policies and Procedures

School policies and the type of relationship between the university and student organizations vary greatly because they are influenced by governance from the state, the university's board of trustees, and other sources. If your university has an office that works with student organizations, utilize this valuable resource. Attend trainings they hold for student organization leaders, or set up an appointment with someone who can tell you about how student organizations are governed at your school. Understanding these policies will help your organization run more smoothly give you access to all the resources your school can offer.

Regardless of the university policies, most universities require registered student organizations to complete paperwork on a regular basis. Forgetting this paperwork can limit the resources available to your organization. Consider creating a calendar for all important university paperwork, especially for forms that must be filled out on a regular basis. Set up reminders for these items so that no one on your leadership team can forget to make a submission by the deadline.

### 2.4.2 Handling Challenging Situations

Since your administration provides access to funding and resources, it is important to handle disagreements you're your university administration in a delicate manner. For issues that arise due to policy concerns, do your best to understand the violation. Discuss with the appropriate administration personnel and explain your organization's position. Some policies may be outdated or unfitting to the needs of your organization. Explaining the concerns to the appropriate entity may be the only way these policies change or may provide your group with an exemption. If you are unable to resolve your issue this way, do your best to operate within the



rule. If that is not a possible, it may be helpful to reach out to your university legal clinic, or the oSTEM National Board.

Student groups at public universities are often protected under federal and state laws. If you feel your group is being legally discriminated against, consider contacting an organization such as the ACLU to find out what your rights are. Please keep the oSTEM national organization apprised of any developments such as this, we can help if need be. If you pursue legal action, be prepared for pushback from your school and keep oSTEM Incorporated informed of your situation.

## 2.5 Transitioning to new leadership

A smooth transition to new leadership is important to ensuring your chapter's future. Achieving such a transition will require that the new officers to be familiar with your group's structure, policies, and procedures, as well as general practices of effective leaders in the organization. Planning for this transition should start early.

### 2.5.1 Identifying potential new leaders

Even though members who desire a leadership position may make themselves known, current officers should also be actively identifying potential successors from the moment they first take office. Enabling the organization to be creative and productive requires a diverse group of officers with different operating styles and perspectives. Consider posing the idea to members who are actively participating in events and are genuinely engaged with the mission of the organization.

An ideal leadership team is made up of officers who have worked closely with the previous officer(s) and are familiar with the roles and responsibilities of the pursued position. For this reason, it is important for the leadership team to consist of officers with varying levels of experience so that new officers can learn from returning officers, and it is important to provide other members with opportunities for exposure to leadership roles. Often times, such a team structure can be achieved by pushing younger students to become involved in your leadership in smaller roles, with the intent that they will rise to more significant positions as older leaders graduate.

### 2.5.2 Elections

Planning an election for your chapter can take quite a bit of forethought. Prepare for officer elections early in the semester. This will give you time to ensure the incoming leadership is adequately prepared once their duties begin. Provide members with a summary of information regarding the duties and qualifications of each position and provide for a way of nominating candidates. Outline the election process and date for members. Provide nominated candidates with a timeline of the transition process and have them commit to attending transition and training events. Throughout this process, be sure to follow any university guidelines and organization bylaws.

Holding an election is just the first step in your leadership transition, there are many tasks after the actual election that must be completed before your new leadership can take over. Appropriately inform your university administration of the change to your organization's leadership including when the change will be effective. As stated in Section 2, remember to

inform oSTEM Incorporated in this same manner. Pair up each officer-elect with the officer currently holding that position, and ask the current leader to share specific responsibilities, contacts, and other helpful information with the incoming executive. New officers should review the previous year's goals and activities and be made aware of any commitments or plans they will become responsible for. Discuss financial information and budget justifications. Consider holding a transition workshop or creating an officers' handbook. It may also be a good idea to introduce new officers to important campus and community members you have previously worked with. No matter what, remember that your new team will take some time to bond with each other. It may be useful to incorporate such discussions into your retreat, if you are planning one.

Though elections are the most common way to select new leaders, some chapters use an interview system to fill officer positions instead of elections. The reasons that some chapters use interviews instead of elections include ensuring the best fit between officer and position where some positions have become highly specialized, as well as the ability to bring in new energy to the leadership team that may not have previously been active in the organization. Whichever process you choose for selecting new leaders, make sure it is fair by requiring returning officers to go through the same process as new officers. First, the president should be selected by those current officers who are not seeking to become president, and then the other positions should be filled.

### 2.5.3 Officer transition checklist

A short list of items to do during a leadership transition is provided below. As always, this may not be comprehensive, so please expand this list as needed for your particular situation.

- Complete university paperwork
- Introduce new officers to the oSTEM National Board
- Transfer bank account information
- Disclose financial documents
- Share online account usernames/passwords
- Reassign administrators on Facebook and other social media
- Give physical supplies and keys to new officers
- Update letterhead, website footers, contact info, etc.
- (New officers:) Establish meeting times

## 2.6 Financial Matters: Money, Money, Money!

Budgets can often be a bottleneck for oSTEM chapters. By staying on top of all financial activities, your chapter can be in a better position to work effectively.

Maintaining a bank account for your chapter may be a necessary part of managing your treasury, depending on your university's policies. Look for a bank on or near campus that offers accounts for business or, even better, specifically for student organizations. To open an account, you will need to apply for and receive a federal Employer Identification Number (EIN) from the IRS. Applying for an EIN will only take a few minutes and can be completed online: <https://sa.www4.irs.gov/modiein/individual/>. You may also need a letter from your advisor or university activities office verifying that your organization is active. All students who will need access to the account should go to the bank together with government-issued ID to make the process more efficient. We strongly recommend that at least two officers have access to the account.

Remember that for all financial and tax purposes, oSTEM Incorporated is distinct from your chapter. You should not use our EIN for any of your own accounts.

Maintaining a budget is extremely important. An oSTEM chapter's treasurer is often the person responsible for maintaining a budget for the group. This person should be tracking all of the organization's incomes and expenses. Ideally, the treasurer's documents should also break down spending by projects for a clearer picture of your group's financial situation. If your group has a relatively small cash-flow, this can be done easily using an Excel or Google Docs spreadsheet. If your chapter's finances are more complex, you may outgrow a manageable spreadsheet. In that case, consider investing in software such as QuickBooks or using an online financial tool like Mint.com. The treasurer should also maintain records, either paper or electronic, of financial paperwork such as purchase orders and receipts. See Section 4 for more useful electronic and online tools.

Fundraising is a great way to add to your chapter's operating funds. While most universities have restrictions on how you can spend university money, they usually do not restrict how you must can independently-raised money, so this type of income provides the most flexibility. You should be aware of any local or state government regulations regarding fundraising activity, especially tax laws. Two common fundraising activities that are often governed by special regulations are raffles and food sales. If you pursue these forms of fundraising, ensure you have the proper permits. Be as creative as possible with fundraising, and if your fundraising activities involve sales to the public, be sure you have a plan in place for cash handling and management. Also consider using a mobile payment solution like Square or PayPal to expand the forms of payment you can accept.

Another form of income for your chapter is donations. Donations are an excellent way to fund your chapter's projects. Unlike corporate sponsors, many donors are likely to expect their donation to be deductible donation to a tax-exempt 501(c)(3) organization. Your chapter is likely not incorporated independently under this tax clause, so be sure to discuss with your donor what their expectations are. Despite what many universities would prefer their students to believe, most corporate sponsors that recruit your chapter's members do not care if their financial support is considered a donation or not.

If your organization is considered a subordinate component of your university, then your university's tax-exempt status probably extends to your organization. If your organization is considered an independent creature operating on-campus, then your school may provide a way for donors to make a donation *to* the school, earmarked for spending *on* your organization. Either of these would allow the donation to be tax-deductible without necessitating that your chapter file for 501(c)(3) status.

If a donor is unable to give to your group because you do not carry this status, contact the national board, which is a federally-recognized 501(c)(3) non-profit. Your treasurer should be sure to record from whom each donation came and for what it is earmarked. It is the treasurer's responsibility to ensure that the proceeds from this type of income or are spent in accordance with any stipulations that were made at the time the donation was made. Whether or not the donor has requested it, consider informing the donor about how their donation supported your group. They will appreciate the gesture and it will force your group to understand how the donation was used.

With respect to taxes, oSTEM Incorporated is unable to offer tax or other legal advice. Nothing in this publication constitutes such advice. Instead, these are simply observations of individual chapters, which may or may not be generalizable to your situation. Always consult a tax or legal professional if you have any doubts about any requirements. If your organization is a subordinate component of your university, your organization may be included in their tax filings.

Most small tax-exempt organizations whose annual gross receipts are normally \$50,000 or less are required to electronically submit Form 990-N, also known as the e-Postcard, unless they choose to file a complete Form 990 or Form 990-EZ instead. If your organization is a subordinate of a parent organization and your organization is included on the parent's group return, you are not required to file the e-Postcard.

Remember again that oSTEM Incorporated is not a parent organization of your chapter for tax purposes. Contact your university if you believe that the school may be your parent organization. See the following link, and consult a tax professional if you have any questions.

[http://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations--Form-990-N-\(e-Postcard\)](http://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations--Form-990-N-(e-Postcard))

## Section 3. Internal Chapter Management and Operations

Until now, we've primarily discussed your chapter's executive board and its relationship with other entities, such as your university, your sponsors, other organizations, and new leaders. However, the ultimate mission of your chapter is to serve your students. In this section, we tackle tough topics surrounding information and feedback from your members, effective program and event planning, planning general body meetings (and how they differ from executive board meetings), and finally, conference attendance. First, we dive into some larger ideas about knowing what your members need from your chapter, then continue to specifics of day-to-day operations and suggested events that have evolved from our own applications of this method. Hopefully you'll also pick up some valuable interpersonal communication tips along the way.

### 3.1 Knowing what your members need: Feedback and Assessment

Starting out this entire section with assessment may seem counterintuitive. We hope that by presenting this "big picture" first, you can center your chapter's programs squarely on your members and their experiences, and then while implementing programs later, you approach everything with an eye towards the efficiency that assessment can offer.

No matter if you're a new chapter leader, having only held a few meetings (which have undoubtedly been awesome, because all our oSTEM leaders are awesome!), or an old pro at queer leadership, learning and implementing effective planning strategies can make the difference between a stale, soggy oSTEM chapter and the crisp, fun organization you dream of.

This chapter outlines heavily-researched leadership theory surrounding planning and assessment, as well as some applications for oSTEM chapters specifically. See Appendix B for more references on the principles discussed here. Remember that although this content may not feel as rigorous and verifiable as other theory that you may be used to as a STEM student, it is still based in just as much science and evidence and has been empirically shown to work. Feel free to pick and choose, not everything here applies to every group. But hopefully, you'll learn something new, and enhance your chapter's activities.

#### 3.1.1 Motivation behind assessment: why bother?

We fully realize that you are a busy person. We have yet to meet an oSTEM student, much less an officer, with extra time on their hands with which to ponder the meaning of



leadership. So, why should you spend your precious minutes working through these practices with your executive board? Because, in essence, these ideas work. You will see great returns on investment by taking time up front and having these conversations. Formalizing the way you approach leading others has tremendous benefits for long-term organizational growth. These ideas have also been empirically validated, and are generally-accepted best practices for student organizations. Again, see Appendix B for more.

That said, the efficacy of all of this varies depending on the size and age of your chapter, as well as your resources. Talk to the national board if you'd like specific feedback about what would work with your individual chapter.

### 3.1.2 The Assessment Cycle

When evaluating any programs, events, or activities that your chapter may hold, it is useful to envision a model of a cyclic planning and assessment process. This model, usually termed the Assessment Cycle, consists of four stages:

- 1 Set Goals
- 2 Design Programs
- 3 Hold Programs, Collect Data
- 4 Assess and Make Changes

#### 3.1.2.1 Stage 1: Set Goals

Before any planning or brainstorming for an event begins, it is best to have a number of well-defined goals set for the event. These goals should be based on your mission statement, in order to realize your chapter's vision statement. See Section 1.2 for more information on mission and vision statements. When setting goals for an event, an acronym that may help you create your well-defined goals is "S.M.A.R.T.":

- Specific
  - Vague statements do nothing to help focus your event. Also, making specific goals will allow you to evaluate your success more effectively.
- Measurable
  - A goal should be measured either quantitatively or qualitatively. In order to determine whether or not you've actually met your goal, you need to collect data and information.
- Attainable
  - Setting unrealistic goals is counterproductive, since you know the outcome before you even start planning the event. Set goals that you can reasonably reach.

- Relevant
  - Any goal should directly refer to some aspect of your mission. A goal is irrelevant if you cannot describe how the goal works toward achieving your chapter's larger mission.
- Timely
  - All your goals should have a set time limit. For an ongoing program, be sure to set deadlines and dates.

An excellent example of a S.M.A.R.T. goal for an oSTEM chapter's resume workshop event would be:

*Every one of our students makes at least one change or improvement to their resume by the end of the workshop event.*

This goal is specific, since your chapter's members and their resumes are the objects discussed. It is also measurable, since whomever is leading your event could do a poll at the end of the meeting to count the number of students who have made a change to their resume. Similarly, it is attainable, as long as you don't have too many members attending. If your chapter has professional development in some form as your vision, and part of your mission relates to improving your student's professionalism, then this event is relevant. Finally, this goal is timely, since it specifies the deadline of the end of the event for results.

### 3.1.2.2 Stage 2: Design Programs

Given a set of goals, your next task is to design a program to meet those goals. This process varies quite a bit between leadership styles, structures, and other variables, so it will not be discussed in-depth at this point. See later in this section for specific tips for different types of events.

However, there is one rule you should consider here: your goals should lead to your events, not the other way around. If you find yourself attempting to retrofit goals to already-existing events, then your chapter leadership may want to re-evaluate your original mission. Remember that these things can change as your organization evolves.

### 3.1.2.3 Stage 3: Hold Programs and Collect Data

Finally, after your event has been planned and organized, remember to collect your data and information when you execute your plans. When discussing the concept of "data" in this setting, remember that you do not have to stick to numbers and figures. "Data" should be anything that informs your decisions as a leader. As a consequence, data is often split into two distinct categories: qualitative data and quantitative data.

### 3.1.2.3.1 Qualitative Data

Qualitative data is that which comes in the form of sentences, words, general feedback, stories, or other information that is not numerical. This can be received by simply talking to your members and getting their responses. Written feedback forms are also good. However, remember to think outside the box: if your attendees post something to Facebook about your event, that thought would be considered data also.

### 3.1.2.3.2 Quantitative Data

Quantitative Data is synonymous with numerical values. Examples include the number of attendees at an event (which could be measured by a sign-in sheet or headcount), or the number of raised hands in response to a question. Again, remember to look for new forms of quantitative information in new areas such as social media. The number of Facebook likes or Twitter re-tweets could be useful to you and your fellow leaders.

### 3.1.2.4 Stage 4: Assess and Make Changes

Be sure to use these results. Discuss your data with your leaders and the rest of your board. Analyze what your quantitative data might mean in the context of the event, and what that tells you about what you could do better next time. After an event, it is useful to decide on a set of concrete changes for future iterations of the event.

After you've assessed and decided on changes, return to the first step, set your goals, and host another fabulous oSTEM event.

## 3.2 Holding Effective Meetings: General Body and Executive Board

At this point in your career as a student, we're sure you've attended a variety of meetings, of a variety of sizes, of a variety of purposes. Some of these may have been spectacular, and others may have wasted your time or the time of others. Think to yourself: what made the good ones effective? In this section, we'll discuss general principles for effective meetings, as well as some suggestions for the two types of meetings that oSTEM chapters commonly hold.

### 3.2.1 Characteristics of Effective Meetings: Goals and Agendas

Of all the tips and suggestions we have for your chapter's meetings, two stand out above the rest. We have never hosted or attended meetings that have been objectively successful without both of these two characteristics: meeting goals and an agenda. Remember that these two items are the responsibility of the facilitator of a given meeting, and not necessarily the chapter president: if your VP is running a meeting, it's that person's duty to set goals and make an agenda.

#### 3.2.1.1 *Goals for Meetings*

The purpose of your meetings is likely implied by your everyday operations, but it's incredibly useful to set specific goals for each time you come together as a group (either as an executive board or as a general body). Though it may be useful here to apply the S.M.A.R.T. goals criteria from above, that level of strictness isn't absolutely necessary every time. Your meeting's goals could simply be, "Work out a plan for the event next Monday," or "Foster our community through social interactions while playing Super Smash Brothers." Commonly, the meeting organizer will suggest a few goals on the agenda (see below), and then run that set by everyone at the beginning of the meeting. The most important part of goal setting for meetings is that everyone involved knows what the specific goals are, and agrees upon them. A common pitfall for executive board meetings is for your officers to say, "Wait, what's the point of this? Why are we even meeting today?" Avoid that by setting goals.

#### 3.2.1.2 *Agendas: A Leader's Best Friend*

The second, but equally important, aspect of effective meetings is an agenda. A well-structured agenda can be the difference between chaos and smooth operations. Agendas can be done any number of ways, but usually consist at a minimum of a list of items to discuss. Depending on how much there is to talk about, a facilitator can share a short outline of simple topic names with the rest of the group, and then keep a more detailed list for herself. This allows

the meeting attendees to stay focused, while keeping in-depth information at your fingertips. It's often good practice to share an agenda in advance of a meeting and ask for revisions or suggestions, in order to allow others to include items that they wish to discuss.

### 3.2.2 Executive Board Meetings

The major way that your board will come together to solve problems, make decisions, and move your chapter forward will likely be at your executive board meetings. These commonly are structured in a traditional meeting format, where all of your officers know each other casually (and additionally, know and use each others' preferred pronouns), and where each person is expected to have information about the progression of their responsibilities over the intervening time period.

Though your general body meetings may sometimes require meeting minutes, such a document is absolutely necessary for your officers' meetings. It is entirely up to your chapter to decide the best way to take meeting minutes, as well as the depth, organization, and sharing of such documents. One suggestion is to use the agenda document itself as the minutes: have your secretary take minutes on a copy of the agenda. A major advantage here is that if done electronically, sharing occurs automatically afterward. The national board uses Google Drive for our minutes/agendas at the current moment, and we have seen that platform work well for other chapters in the past.

A typical agenda for an executive board meeting would involve:

- 1 Meeting Goals: very short discussion about the goals of the meeting
- 2 Agenda verification: "The agenda is online/up on the board, does anyone have suggested changes or additions?"
- 3 Agenda Items. Sometimes, chapters split this up into "old business" and "new business", but that is purely for your own organizational benefit if you desire.
- 4 Action Items and Moving Forward

One of the most important distinctions between meeting types is the inclusion of the last item, a verification of action items for each board member. Action Items consist of tasks that an individual is set to work on or accomplish by the next meeting. They can vary widely and can be as broad or vague as needed. The best way to think about the qualities of a good set of action items is to answer the question, "Will this person be able to say that they've made progress on the item or completed the task when we meet next?" Often, these items arise over the course of the meeting, and it's the responsibility of the facilitator to point out that the current conversation topic would be best described as an action item for an individual member.

Though sometimes dull and tiring, don't let your board meetings fizzle out. At the end, be sure that everyone has clear goals and action items in their mind, as well as deadlines. A review of the action items at the end can act as a rejuvenating conclusion to the meeting.

### 3.2.3 General Body Meetings

Unlike executive board meetings, the purpose of general body meetings is not usually to make decisions. Though this may be an opportunity for gaining group consensus in some way (take a look at feedback suggestions in the previous section), it's often impractical to have a significant decision-making conversation with more than a few people. Consequently, agendas may be more vague and less structured, but still necessary. Often, an agenda will consist of an icebreaker, a few announcements, and then the main event or purpose of the meeting.

A common technique for general body meetings is to host them around a specific topic or idea. Discussions can be facilitated here about any number of topics, see later sections for discussion ideas. Also, be sure to see the appendix of “Being an Effective LGBTQA Leader” by Tim Valentine for facilitation skills suggestions.

Again, there must be some purpose or point to your meeting, or else the attendees will feel as if you've wasted their time. But remember, that purpose could simply be socializing! If you don't have anything specific to discuss or have anything planned for a general body meeting, don't hesitate to bring in some board games and let you members build community. Be sure to take a look at the event ideas listed later in this section.

### 3.2.4 Facilitation Tips and Suggestions

See the attached appendix, “Being an Effective LGBTQA Leader” by Tim Valentine, for more tips and suggestions about facilitating meetings and working with queer student leaders.

## 3.3 Event Planning

Events are one of the core functions of your oSTEM chapter; they bring your students together, they help build community, and they work toward your chapter's mission. However, planning events can be challenging if not orchestrated properly. In this section, we first discuss some general procedures for planning and executing events in general. Next, some specific ideas for events are outlined. Be sure to check out Section 3.4 for more tips on advertising and planning.

### 3.3.1 Planning Events

No two events are alike, but some general procedures to apply to most events. These serve only as a guide, more steps may be required, or you may want to skip certain steps as applicable. Remember to check out Section 3.1 for background on event planning, and Section 3.4 for more concrete ideas. The general outline, expanded in the following sections, is below. Remember that these do not necessarily have to follow in the order listed here.

- 1 Decide on an event, set goals
- 2 Coordinate your funding
- 3 Coordinate with other organizations
- 4 Select your date and time
- 5 Secure your venue
- 6 Plan your food/beverage options
- 7 Create an agenda or program plan
- 8 Advertise
- 9 Plan set-up and clean-up
- 10 Gather all materials, including assessment materials
- 11 Enjoy your event!

#### 3.3.1.1 *Decide on an event, set goals*

Follow the procedures discussed in 3.1 to decide on an event, as applicable to your chapter's leadership structure. Usually, this involves a discussion with all of your officers at an executive board meeting, where you would decide on what goals you wish to accomplish through the event and how, as well as coming to a consensus about what the event should entail.

### *3.3.1.2 Coordinate your funding*

Coordinate your funding, if applicable. Some schools and universities charge for any number of services, including room reservations and advertising space. Research these requirements before moving forward, and be sure that you have room in your budget for such costs. If not, get creative! Advertising can be done for free online through Facebook, for example.

### *3.3.1.3 Coordinate with other organizations*

Coordinate with any collaborators or other people involved in the event. For example, if you're hosting a company for sponsorship purposes (be sure to check out Section 2), stay in constant contact with their representatives. Be sure not to assume anything - be clear about what your chapter will provide for the event. Remember to stay in contact with all your collaborators throughout the entire event planning and execution process.

### *3.3.1.4 Select your date and time.*

Select your date and time. Remember not to schedule a meeting or event during any University-wide celebration, during the meeting times of other relevant student groups (such as your university's primary LGBTQ student organization), or during midterms or exam times. Some of the scheduling tools in Section 4 are very useful for selecting a time that works among a larger group of people.

### *3.3.1.5 Secure your venue*

Secure your venue. During your board's group discussion about your target audience, you hopefully had some sense of the number of attendees. For example, events at the beginning of the semester could have as few as ten or as many as fifty people (depending on many variables such as advertising, your school's size, etc.) Find a venue accordingly. Commonly, this could be a classroom, a shared space for student groups, a space at your LGBT resource center, or any other place you'd like. It's usually a good idea to reserve that room, and to do the reservation well in advance.

Remember that reservation can be complicated, and can take time. This will depend entirely on your school's infrastructure for reservations. Don't hesitate to seek out resources on campus to help guide this process.



### *3.3.1.6 Plan your food/beverage options*

If you plan to have food or beverages for the event, be sure to consider those in your budget. This can get tricky - occasionally, university budgets do not allow for consumables to be purchased. Be sure to work this out with the appropriate university representative before planning on bringing food. Also, many oSTEM members have dietary restrictions: remember that pizza is not vegan. It may be the case, also, that the space you plan on using has restrictions on allowable food. Sometimes, venues restrict outside food, and will not allow you to bring in outside food and beverages. Plan accordingly.

### *3.3.1.7 Create an agenda or program plan*

If applicable, come up with a specific agenda for the event based on your original set of activities. Commonly, if you anticipate new oSTEM members attending, you may want to start the event off with a five-minute introduction to your chapter, what you do, and how to get involved. See Section 3.4 for more recruiting and retention tips. Remember that an agenda for an event does not have to be as strict as that for a meeting, especially if the purpose of your event is social or community building: let your members enjoy themselves in the moment, even if you may have to move around the agenda timing as the event progresses.

### *3.3.1.8 Advertise*

Methods of advertisement vary widely by school. Aside from flyers, Facebook can be one of your best advertising mediums. Generally, social media are good methods of advertising, see Section 4 for more details about the use of these tools. Additionally, consider posting event notices to listservs for your program or college, advertising through other similar organizations (queer groups, other STEM groups), or using sidewalk chalk ads. Usually, having advertisements out 2 to 4 weeks in advance maximizes your impact.

Posting flyers is the traditional cornerstone of advertising. Some places require pre-approval for posting flyers, remember to check before assuming you can post announcements on every bulletin board. You're encouraged to use the oSTEM logo for your chapter on any flyers you create, but remember to keep your wording appropriate. A flyer can usually be made simply and easily in any document editor. Remember to keep the words large and easily-readable from a distance. Sometimes, black-and-white flyers will be cheaper than color copies: be sure to check your budget for what you can afford, and plan accordingly. Some details to include on every flyer would be:

- Event name
- Event description (usually very short)
- Event time and date

- Event location
- The oSTEM logo, and if applicable, a short description of oSTEM
- Contact information (usually an email address or Facebook page/group name)

#### *3.3.1.9 Plan your set-up and clean-up*

Plan your set-up and clean-up, if the event requires it. If one of your officers is bringing food or board games, for example, be sure that person has their own details worked out. It's unfortunately common for mis-communications to occur when it comes to event responsibilities, so make sure your communication channels with your officers are wide open.

#### *3.3.1.10 Gather all materials, including assessment materials*

Plan in advance to have everything you need for the day of the event. Many leaders find it useful to gather all required materials in a single place well before the event begins, so as to reduce unforeseen issues. Also, hopefully your leadership discussed a plan to assess your event while planning it - see Section 3.1 for more assessment tips. If your assessment strategy requires any extra materials (for example, paper feedback forms which may need to be printed out), be sure that you have enough for all your attendees.

#### *3.3.1.11 Enjoy your event!*

Many leaders stress out unnecessarily while events are actually taking place. While staying responsible, remember to interact as a participant in your event. If you have any questions about specific event procedures, don't hesitate to ask your advisor at your school - or, if you think we can help, don't hesitate to ask the national organization.

## 3.4 Event Ideas and Event Descriptions

Depending on the time of the semester and your resources, there are a variety of events that your chapter could put on. This section is split into two: first, a set of tested and highly-suggested events is listed, along with in-depth descriptions. In the latter section, we have a larger set of general ideas that may also make for good events, but do not have full descriptions. If you have a new event idea that your chapter executed successfully and would like to share it with other oSTEM chapters, please contact the handbook authors and we'll gladly include it. The handbook editors' email is [handbook@ostem.org](mailto:handbook@ostem.org).

### 3.4.1 Event Ideas: In-Depth Descriptions

For the first meeting of any semester, some common goals would be to inform potential members about the chapter, get people excited about joining oSTEM, and collect emails and contact info to bring people into your membership. Thus, informal social sessions are usually fantastic here. Pizza is great, and you can have a 5-10 minute slideshow if you want: this is a good place to put up pictures of past events. A short activity or check-in is usually good for bringing people together at the start of this first meeting, and usually one that's active is best. As an example, search for "Forced Choice Icebreaker" on Google for an excellent example of a lighthearted social bonding activity that involves movement and conversation. More icebreaker ideas will be forthcoming in later versions of this handbook.

Resume clinics, critiques, and workshops are great events for early in the semester. Many schools have career fairs about one month after the beginning of classes, so having one of these as your second meeting or event can be very useful. It's useful to ask your attendees to bring their resumes to these events. There are many formats for such an event; here are some that have worked in the past:

- 1 Presentation by your Career Center and/or by your LGBT center: these are best when you plan on having many underclasspeople at the event, since such presentations usually concentrate on the basics of resume building. They can sometimes be dry, so be sure to talk to your presenter about expectations and timing before hosting the event. Additionally, be sure that the presenter is aware of oSTEM Incorporated's inclusive policies and be sure that their information conforms as such: your trans\* members could be alienated if the presenter dives into a discussion about "proper dress for career fairs" and uses non-inclusive terminology.
- 2 Presentation by your officers or by your executive board: this can be great when you have one or more skilled or older students who have a lot to share with others. As before, be sure that all the information is inclusive. This is a great opportunity to talk about

queer-specific issues on resumes, and to help students answer questions such as “should I be out on my resume?” or “how can I list oSTEM on my resume?”.

- 3 Roundtable discussion or one-on-one: Combined with a short presentation, you could have upperclasspeople volunteer to help others look over their resumes. This works well when your current chapter membership has a decent number of juniors and seniors (or grad students) that can provide tips and guidance. This usually occurs as a short break-out throughout a room, in a casual manner.

Another excellent professional event is hosting out and proud LGBTQA professionals in your community to come and talk to your chapter. This may be achieved through contacts at employee resource groups of your corporate sponsors, or by contacting individuals. You could host a discussion, with your members and professionals together in a circle, or have it be panel-style: have your panelists sit at the front of a room, and have your students ask questions.

Just as effective can be hosting panel-type events with out LGBTQ graduate students or professors. If your oSTEM chapter has graduate students, they may have useful insight into applying to grad school as a queer person, and can help any current undergraduates currently making that decision. And remember, your advisor could share her/his/zir/their experience as an out person in academia.

Hosting a corporate sponsor is a great event idea for a variety of reasons. Commonly, this is associated with a financial benefit to your chapter: if a company comes and talks to you, be sure to mention how your chapter could put sponsorships to good use. Some companies have expectations of what these information sessions will be like, and others will want your chapter to dictate the structure. Be open to either, and be sure to see Section 2 for more information about such activities.

There are any number of other good discussion topics for professional events, if you decide to hold a low-key meeting with just your members. One of your officers could moderate a discussion about many issues, including:

- 1 Building your brand: making your Facebook or LinkedIn attractive to employers
- 2 Navigating internships: being professional but out and proud as an intern
- 3 Interviews: talking about your strengths and your diversity as an LGBTQ person

Social events are even easier to plan than professional events. Often times, your members’ primary interest in joining oSTEM is to socialize, so providing that venue plus a small push towards discussion usually makes a wonderful event. Some ways to provide unstructured social activities at an event or meeting are:

- 1 Board games. After a short introduction or icebreaker, board games work great for building friendships. We've had great success with many games, including Bananagrams and Apples To Apples.
- 2 Video Games: if you can find a room with a projector, and one of your members or officers has a video game system, then this can also be great social bonding. Remember that your members are STEM students: many of us play video games! Usually, multiplayer games are best. We've had success with all iterations of Super Smash Brothers, and most Xbox Kinect games. But anything would work here, just remember to consider your members: some may not want to play mature games.
- 3 Ice Cream Social: If your budget allows it, having a make-your-own sundae event can be simple and easy.

### 3.4.2 Extended List of Event Ideas

Below is an expansive list of other event ideas. These have not necessarily been vetted by the national organization, so it is up to your chapter to come up with the plan and agenda! Remember to set the goals for an event first (see Section 3.1), and then pick an event topic that may work toward those goals.

#### 3.4.2.1 General Events, Activities, and Meeting Ideas

- Collaborations with SWE (Society for Women Engineers), SHPE (Society for Hispanic Professional Engineers), NSBE (National Society for Black Engineers, WISE (Women in Science & Engineering), AISES (American Indian Science and Engineering Society)
- Hold an LGBTQA workshop in connection with main Career Fairs and minority Career Fairs
- Develop a tutoring program
- Homework/Study Sessions
- Plan a visit with another oSTEM chapter
- Plan a trip to see a city, company, museum, amusement park, or graduate school
- Create a lasting project for your chapter or for oSTEM Incorporated that all the chapters can use
- Help a student with a presentation or a graduate student prepare for a defense
- Participate as a group in University Events (homecoming, etc)
- Look for contests or create your own.
- Start a mentoring program -- also consider joining MentorNet or the Point Foundation
- Hold a rally
- Sponsor a group advertising activity like chalking
- Find some community service event to take part in. For example, Campus Clean-Up.

- LGBT History Night
- Create a “LGBT in STEM” Poster series.
- Throw a "fashion show." Use the theme "Coming Out of the Closet."
- Sponser a disco party. Use the theme "Coming Out of the Closet (1970's)."
- OMG = oSTEM Molecular Gastronomy. Thanks to oSTEM @ Illinois for this, contact that chapter for more information.
- Beginning of the Semester mixer
- Hold your regular meeting at a coffee shop -- or bring beverages to the meeting space
- Informal Meet & Greet with a different professor each time
- Hold a joint social meeting with games, food and/or video with another student organization

#### *3.4.2.2 Potential Discussion Topics*

- Queer scholarships and assistance: where to go when life gives you lemons
- Up and coming technologies
- How to make an application for iPhone, Droid, iPad, Facebook
- The best computer language in various situations
- Recent groundbreaking or interesting research in Science or Nature
- Practice presenting a publication to an audience
- Pitch an idea, develop an invention, plan a workshop
- Importance of community service on a resume
- Stopping Hate: How to respond when someone uses offensive language
- Professional/Social Networking
- Understanding LGBT workplace issues
- Negotiating salaries
- Empowering Allies
- Movie/Documentary and Discussion
- Debate/Open Discussion about a current topic or event

#### *3.4.2.3 Entertainment and Social Events*

- Design Jam Contest: Pick a current technology or household appliance and augment it for the future
- Play flash games or show off favorite miscellaneous websites or YouTube videos
- TV nights to catch up on shows or watch re-runs
- DVD nights focused on shows/movies related to the STEM fields
- Paintball (note: be absolutely sure that events like this are inclusive of all your members' specific abilities. If not, provide alternatives or don't host the event: don't leave anyone out.)
- Laser Tag

#### *3.4.2.4 Outreach Events and Collaborative Events with other organizations*

- Egg-Drop Contest: Engineer a safety device and see which egg can survive the most height! Thanks to oSTEM @ Berkeley for this idea, contact that chapter for more information.
- LGBT Trivia for non-LGBT communities and Greek Trivia for LGBT communities
- Hold a joint social meeting with games, food and/or video with another student organization

### 3.5 Recruitment and Retention

Frequently, a chapter's first one or two events of a year or semester are widely attended. Booming initial attendance is usually the result of a combination of factors, including students returning to campus, a desire to connect with the LGBTQ in STEM community, and a lack of homework or projects early on. Other factors include advertising from outgoing leaders and organizational fairs that provide an easy recruiting opportunity.

However, it's almost inevitable that this initial attendance will drop. It's more difficult, but just as necessary, to retain students throughout the year and recruit new members mid-semester. The key to membership retention is routine. Students are much more likely to remember your meetings, to schedule other things around them, and make sure they don't put a major assignment off until that night if your organization has a frequent and consistent meeting time and place.

Because of how important it is to have frequent and consistent meetings, it is best to start planning for the year or the semester by making a schedule for the meetings. Think realistically about what your officer team can manage: weekly meetings can be great for retention, but only if your officer team has the time and resources to plan a worthwhile event every week. Meeting every other week, at the same time and in the same place, can be a good schedule if your resources are limited.

After deciding on meeting times, it's a good idea to plan out some of the future meeting topics or events that will occur at these predetermined dates and times. Look at your schedule and determine which dates require the bigger events. These are the dates and events that will "anchor" the rest of your schedule. Naturally, you will want a major event to anchor your organization at the start of each semester, but you also need a fun and exciting anchor that will generate buzz at the end of the semester so that students look forward to returning. Again, see the previous section for ideas on early-semester events and other events. After you know the dates for your anchor events and your other events, you can start filling out your schedule with more specific plans.

Think about three different kinds of marketing activities you can do for your events: (1) routine, (2) anchor, and (3) unusual.

Routine marketing activities are those basic activities with no financial cost, such as Facebook and email newsletters. Decide which officer will be completing each of these routine tasks, and keep those responsibilities consistent for each event so that they don't require additional planning.

The anchor events need more marketing than other events because these events are the ones you need a large turnout for. Examples of such enhanced advertising might include



colorful flyers or making announcements at other organizations, but activities will vary from campus to campus. Like the routine marketing, have a consistent plan for who is doing what, but realize that these activities take more time, effort, or money, so be strategic about which events you do them for. See above for more marketing tips for flyers.

The appeal of many of your events will be related to your chapter's ability to mix LGBTQ issues, STEM issues, and other ideas in a unique and fun way. Use each event's unique hook to bring in new students and recruit members throughout the year. Once you determine which audience you want to reach out to with a given event, it's sometimes useful to review your advertising and recruiting strategies in order to innovate and meet your recruiting targets.

Remember that your students need a reason to attend these events and meetings. Your organization is asking for time away from their busy schedules, so be sure to make the most of that time - even if, for social events, the best use of that time is relaxing and allowing friendships to build through casual conversations.

Finally, a key step in retention is encouraging members to become more involved with your chapter. It's often useful to have small tasks that members can take on or help an officer with; for example, an interested member could help plan some part or aspect of your event. This encourages people to become invested in your chapter, and grooms them for future leaderships. Many times, future leaders start off as members that gradually take more and more responsibility. Be sure to have these conversations with your membership year-round: if you see someone who you think may be a good fit to become more involved, offer them that opportunity.

## 3.6 Conference Planning

Conferences are one of the major activities that our chapters strive to participate in. First and foremost of any conference should be the Annual National oSTEM Meeting, held early in each fall semester. A variety of other conferences are available for your chapter to attend, but we strongly encourage you to prioritize our national meeting. Attending it can yield great benefits for your chapter and your members, some of which include:

- Networking with the larger oSTEM community
- Leadership skills training workshops
- Interaction with potential employers
- Empowering talks and events to help you guide your community forward

Our national meeting is designed specifically to meet the needs of our student leaders, and is consistently cited as one of our most exciting and successful programs. Accordingly, the national board puts an enormous amount of resources (both financial and personal) into making the conference happen. We'd like to mention that although individual chapters are expected to finance their way to the conference, the national board is occasionally able to help out with certain aspects of financing. Of course, maximizing efforts to fundraise for your chapter will enable us to help you even more; we do our best to reward hard work!

### 3.6.1 Choosing a conference

Again, oSTEM's Annual National Meeting is the "conference of choice" for the national board, and it should also be yours! We expect you to make an effort to attend, and then only if you have extra funding available would it be appropriate to look for other conferences. In the past, our members have attended quite a few conferences with great results, please contact us for a specific list if you're interested, or find them at the bottom of each newsletter. The national organization's involvement with other conferences changes year-to-year, but we do announce relevant conferences over our listserv emails.

### 3.6.2 Conference Funding

Now that we've covered the importance of attending our national meeting, let's discuss the necessary reality of travel and housing costs. Though it's absolutely feasible for all our chapters to attend, it's important not to downplay how expensive this all becomes. As an example, the costs for one single person could include:

- Flight to the conference city (or other transportation)
- Ground transportation once you're in the city

- Hotel costs
- Registration Fees for the conference itself
- Food / entertainment in the city
- Parking fees at hotel and airport
- Taxes on everything, especially the hotel room
- Any extra charges for the hotel room (room condition, etc.)

However, there are many ways to meet these costs. In the past, our chapters have used the following methods to find funds. Be sure to check Section 2 for more information about sponsorship and corporate partnership.

- Your school or university (through a yearly budget)
- Specific grants from other groups on campus (e.g. your LGBT center)
- Grants from companies – if included as items in your sponsorship packet

### 3.6.3 Conference Planning Timeline and Steps

In general, the national board encourages our chapters to find funding well in advance of organizing students to go on the trip. We've found that it's much easier to find members who would like to go on a trip than it is to find money to pay for their tickets. The outline below reflects this philosophy.

#### 3.6.3.1 Six Months in advance

Before you decide that your chapter is definitely going to attend a conference, it's usually necessary to be sure that you have enough funding secured for at least a few members (even just two or three people on your executive board.) This funding could come from a yearly budget: for example, one chapter may know that they can get \$2000 per year from their school. Or, this same amount could come from a corporate sponsor through one of the techniques discussed in Section 2. Knowing the general costs for attendance, this \$2000 should account for 2-3 people to attend a conference anywhere in the nation. Thus, that chapter could be confident in sending at least those people, even if the other funding doesn't come through. Then, once you're committed to going, work on getting as much funding as possible, as soon as possible.

Around this time, once the decision is made to attend, you can usually start talking about the trip within the group. It's not common that chapters have enough funds to advertise for their conference trip outside of their own members.

### *3.6.3.2 Three Months Away*

Your funding should be relatively secured by now. If not, work on this as your primary objective for the immediate future. Once you know your total budget, you can then start announcing the number of slots available for the trip at your meetings. This requires that you know your budget, so again, be sure to get your funding squared away as far in advance as possible.

When deciding how many members your chapter can afford to send, be sure to either put together a conservative budget, or make it known that some of the costs may have to be paid by students. It's not uncommon for unforeseen changes and bumps in the road to develop. And, it's very unprofessional to promise a free trip, then rescind that offer.

### *3.6.3.3 Two Months Away*

Your list of attendees from your chapter should be more-or-less finalized. Now is the time to start booking flights and hotels, and paying registration fees. Remember that sometimes, schoolwork interferes with people's decision to go to a conference. For example, a student's class could have a midterm scheduled in conflict with the conference. So, remind your attendees to check their academic schedules at this point.

### *3.6.3.4 One Month Away*

Confirm that all your attendees are still planning on going. It's too common for people to back out at the last minute because of school, especially because of project due dates and midterms. Have this conversation as a group: Is everyone managing their time well enough to not have to back out the day before the flight to the conference? Be sure you have every financial transaction planned out: If your university pays up front, then be sure everything has been paid for. If they pay through reimbursement, work with your student attendees to come up with a plan to get them their money back: For example, "Email our treasurer your receipts by the end of the week after the conference." Make sure all attendees know the plan.

### *3.6.3.5 Between One Month and the Day Of Your Flight*

Everything should be in place by now. If it's not, then your chapter is likely behind schedule. Please make an effort to get all your logistics in place as soon as possible - trust us, it's easier for you and it's easier for oSTEM Incorporated!

### 3.6.4 Conferences with oSTEM Incorporated

Please read everything we send you about registering for the conference and paying for your hotel. Oftentimes, the national organization reserves a block of rooms for students, and we can help you to reserve discounted rooms for your group. Our current travel coordinator can be contacted at [travel@ostem.org](mailto:travel@ostem.org).

For our conferences, we do not specify how students should room together. It is up to you and your members to divide beds up between students (and chaperones, if attending.) Usually, hotel rooms that are reserved by the national board come with an expectation of two people per room. It is your responsibility to check with the hotel that your rooming situation accurately reflects the room you've booked: for example, sometimes hotels will charge more if there are more than two people per room. Please discuss rooming with your attendees as well as your treasurer to find the best solution for your individual situation, then after you've reserved your desired number of rooms through oSTEM, check with the hotel to be sure any extra fees aren't required. We're a queer organization, so the only expectations about gender and rooming are those that make you and your students comfortable.

Pay particular attention to the needs of some of your underrepresented members, especially trans\* folks. Remember to be inclusive of their needs. If you're splitting rooms up by gender, please ask your members which gender room they'd prefer to be housed in. And be open to the possibility that some members may not be comfortable in either gendered room. If you have any questions about working with trans\* needs, please contact the national board.

### 3.6.5 A Quick Word on Etiquette at Conferences

Remember that oSTEM is a professional organization; please handle yourselves professionally when rooming together. Please act in a way that represents the very best in yourselves. We have lots of respect for what oSTEM represents, and we hope that you do also. Additionally, remember to be respectful of the place you're in, especially in hotel rooms outside of conference hours. Recognize that there are noise restrictions in the hotel, so make an effort to respect other guests.

In general, it is absolutely your responsibility to familiarize yourself with the processes and procedures of checking in, paying for your room, covering extra charges, and all other costs associated with this process. Remember that oSTEM Incorporated organizes these hotel deals with the average case in mind (double occupancy, no parking for a car, etc.) If you have any questions, please contact us before making assumptions.

We're confident that if your chapter gives conference planning the attention it deserves, you'll be enjoying the results for many future trips!

## Section 4. Technology for your chapter

As a whole, oSTEM is quite a tech-savvy group of people. But, that doesn't automatically mean we're taking full advantage of the tools of the digital age to manage our chapters! In this section, you'll find information on a variety of tools to help you lead more efficiently. In 4.1, we discuss online tools for working with others, and in 4.2, tackle social media. See Appendix A for information on more intricate aspects of these issues.

### 4.1 Electronic Tools and Resources

In this day and age, there is a tremendous push to be online, to share information using social networks, and to set up webinars and video conferencing. Each of these can be quite useful, but don't underestimate the importance of programming offline, hosting live events, and sending carefully-crafted emails to individuals. This section will cover when it may or may not be appropriate to use a new resource and will discuss a few problems that can be solved by using the right tools. Appendix A of this handbook has descriptions and links to several of our favorite technological tools.

There are often many technological solutions that could be appropriate for your project. When evaluating a tool for your group, consider whether it has all the features to meet your needs. Also decide whether the added complexity of a tool would increase your team's efficiency or if it would be a burden for other group members, who may not be familiar with the tool. In particular, be sure that any specific needs of your members or officers are met - for example, if a person is hard-of-hearing, a teleconference may not work for them.

Some of your most useful electronic resources will be tools that facilitate group communication. Email is certainly a great way to communicate broadly with members of a group, but there are many situations where instant communication is needed. There are tools, for example, which will allow you to quickly message a small group of people (all your organization's leadership, for example) or to blast a message to your entire membership, reminding them of a meeting or event happening that day. Such tools are great for reaching people when they may not have access to email, but make sure you are respectful and do not overload your recipients with too many messages. Several of these group messaging tools are listed in Appendix A, Section 4.

Scheduling meetings and events can be difficult. If your group is willing to use and share electronic calendars, this may be the most effective way to get a better grip on scheduling. If this isn't an option, or if you need to loop in additional people, considering using a tool that will help find a time when everyone is available. There are a few easy-to-use tools that offer this; find them in Appendix A, Section 1.

Another set of tasks that can be greatly simplified with technology is managing project to-do lists, deadlines, and individual responsibilities. For these, we recommend turning to project management tools, which are designed to help you track projects and their associated tasks, resources, and contributors. Most tools offer the ability to set task deadlines and to assign tasks to specific group members. Users can usually sign up to receive email reminders and digests about the projects they are working on. You can find some of our favorite project management tools listed in Appendix A, Section 2.

Throughout the course of business, there are many other resources that you may find useful to your organization. For technology recommended by oSTEM Incorporated, check out the list of tools in Appendix A. As the capacity of the national organization increases, tools will also be built and provided as a part of the infrastructure of the national website (oSTEM.org). When new tools become available, this handbook will be updated and chapters will be notified of the new functionality.

## 4.2 Using Social Media

As a term, “social media” refers to any number of ways that our communities interact online, such as Facebook, Twitter, LinkedIn, and others. Each of us may individually have different ways of using social media tools in our own lives, but when it comes to being effective with your chapter, certain best practices stand out. In this section, we’ll offer a brief introduction to using social media for an organization (versus for an individual), then outline a few suggestions that chapters have used effectively in the past for popular social media platforms. Finally, we’ll review the national board’s guidelines for social media as an example of a more complete and formal set of procedures.

First, we would like to explain why we felt it necessary to include this section in the handbook. Doing social media for an organization can be very different than how you do it for yourself. For example:

- You may have scheduled events through Facebook before amongst your own friends. But, what if you want to schedule an event for your oSTEM chapter, and some members aren’t your Facebook friends, or perhaps they don’t have Facebook at all?
- Facebook, Twitter, and Instagram can be full of unprofessional content that may be acceptable for a private individual, but probably isn’t appropriate for an organization like oSTEM. For example, that classy picture of you with the mixed drink in your hand, sloppy and falling over, probably shouldn’t be connected with your oSTEM chapter. But, what if you have a social with oSTEM members and some of the over-21 students drink alcohol? You want to take pictures, but should alcohol be associated with your chapter at all, even if legal?
- Who should be in your chapter’s pictures on Facebook and Flickr? Remember that even though your own Facebook profile may primarily have pictures of yourself and close friends, it’s often important that your chapter membership appear as evenly and inclusively as possible in photos taken at chapter events. So, if you are photographing an event, be sure to take pictures of everyone there, not just your close friends. This can be especially important to ensure your chapter’s diversity is represented online.

There are many other examples of such issues that you may run into while using social media in this capacity. However, we think you’ll agree that the benefits outweigh the difficulties. Some reasons why you may want to seriously use social media are:

- Some of your members and leaders will be much more responsive to Facebook Messages and Facebook Events than other methods of communication. Again, this is a lesson from experience: you’ll interact with some people who will never answer emails, but who answer Facebook Messages immediately.



- Spreading the word. In the same way as above, using an email listserv and a Facebook Event could amplify your ability to reach to potential new members (as well as current ones who also need to be kept up-to-date.)
- Sponsorship. As discussed in earlier sections, having a presence online is important for companies and others who may want to sponsor you. The first thing that most people will do when researching your organization will be to Google you - and if your Facebook page comes up, and it looks professional and active, that will increase your chances of funding.

Here are some of our general suggestions for using social media.

- Strive to communicate to your fellow leaders in the way that works best for them. Like we mention above, some people just don't do email. Others use \*only\* email and don't use Facebook. Many times, it's your responsibility as a leader to get in touch with a wide variety of people, and you'll need to communicate over many different media. As an example, you may need to use all of the following to spread the word to fellow officers about a meeting location change, if it's at the last minute:
  - Text message
  - Email
  - Gchat / Google Talk
  - Facebook message
  - Phone call
- Always try to use inclusive language. Gendered words such as "guys," "dude," and "ladies" may not resonate with all your members, so we encourage language such as "folks," "friends," "everyone," or "y'all" when tweeting and posting to Facebook.
- Keep your words appropriate. If you have any questions about this, please ask the national organization about the acceptability of particular statements. In general, we would not encourage negativity or put-downs of any kind; these counteract our mission.
- Be aware that once something is posted to the internet, it often cannot be deleted. Think carefully and critically about all choices. Remember that you're representing your chapter and your actions also reflect on the entire oSTEM community.

Here are some suggestions for Facebook Pages, Groups, and Events:

- Be sure to discuss the privacy settings of your group, page, or event with your board and/or your members, as appropriate. For example, if some of your chapter members are still working on the coming out process, they may be less inclined to join the group if it's open. One solution here would be to have both a page and a group, and have one open, and one closed.
- If you'd like, we would love for you to use your official oSTEM logo for you chapter online.
- All other graphics should be checked for usage rights: please don't post images that you don't have legal permission to use.

- Check your own account's privacy settings in relation to your chapter's page or group, and be sure you're sharing only what you'd like to share.
- Talk to your board about posting to Facebook and creating events. Sometimes, it is one person's responsibility to do this as part of their position. If not, discuss with everyone what standards you'll use to determine what sort of posts would be acceptable.
- Remind your board that as leaders, their words represent your chapter: if they wish to share their opinions, they should do so in a way that makes it clear that it is not the view of your chapter as a whole, and also in an inclusive way. This applies to politics in particular.

Here are some suggestions for Twitter:

- There are many apps and extensions to Twitter that can greatly enhance your experience using that service. National organization members have used HootSuite and Buffer App in the past.
- Test out the options to link Twitter and Facebook, to be sure that your information is posted the exact number of times you desire (double posts can seem unprofessional, especially for a group such as ours which is technologically savvy.)
- As with email, write professional while succinctly: shorter abbreviations can send the wrong message about your chapter's maturity level.
- Take advantage of services such as TwitPic at t.co that allow you to post pictures and shorten URLs. Again, check usage rights before sharing pictures.

Finally, the national organization has been working to develop a set of social media guidelines for ourselves. A formal document like this is useful for us because of how large we've grown - the same may not be true for you. But, maybe you can see some of the principals we discuss. As of this handbook revision, the national organization guidelines are not ready for distribution, but we would be happy to share any of our specifics if you'd like. Please contact [handbook@ostem.org](mailto:handbook@ostem.org) for more information.

## Appendix A: Suggested Electronic Tools and Resources

### Section 1: Scheduling Options

- Google Calendar
  - <http://www.google.com/calendar>
  - Cost: Free
- Doodle
  - <http://www.doodle.com>
  - Cost: Free; additional features available for purchase
  - Doodle allows an event host to propose several event times and have participants indicate the feasibility of each time slot in their schedule.
- Needtomeet
  - <http://www.needtomeet.com>
  - Cost: Free
  - Needtomeet allows an event host to propose several event times and have participants indicate the feasibility of each time slot in their schedule. Also supports recurring events.

### Section 2: Organizing tasks and Project Management

- Trello
  - <https://trello.com>
  - Cost: Free
  - Trello provides allows users to set up boards representing projects. Boards can include various to-do's, attachments, deadlines, etc. Users can collaboratively work on boards.
- Asana
  - <http://www.asana.com>
  - Cost: Free for groups smaller than 30 users
  - Asana provides a shared task list for a team. Tasks can be organized into projects, assigned to specific group members, given deadlines, and categorized with labels. Asana provides a single outlet for project group members to plan, organize and stay in sync.

### Section 3: Email Solutions

- MailChimp

- <http://www.mailchimp.com>
- Cost: Free for <2000 subscribers and <12,000 emails per month
- MailChimp is one of the most popular email marketing tools in use today. It allows users to create or choose from email templates for newsletters, announcements, invitations, and more. MailChimp provides powerful reporting tools providing insights into click-through rates, opt-outs, and new subscribers. There are also many advanced features including social media integration, tools for mobile devices, and an API.

## Section 4: Phone Calls & Group SMS

- Google Voice
  - <http://www.google.com/voice>
  - Cost: Free for domestic calls/SMS
  - Google Voice provides users with a single phone number that can ring one or several other numbers at once. It provides SMS send and receive functionality via a web interface or by forwarding messages to another number or email address. It also provides voicemail transcription which can be send via email or retrieved via a web interface.
- GroupMe
  - <http://www.groupme.com>
  - Cost: Free
  - GroupMe provides group SMS capability for groups of any size. Group members can choose to either use the GroupMe smartphone app or have messages forwarded to their phone via SMS.

## Section 5: Teleconferences

- FreeConferenceCall.com
  - <http://www.freeconferencecall.com>
  - Cost: Free for up to 96 participants; additional features available for purchase
  - Provides a free dial-in conference call service. Users can setup permanent access codes for recurring meetings. Paid features include screen-sharing meetings, additional participants, call recording, and outbound dialing.
- ClearCaptions
  - <http://www.clearcaptions.com>
  - Cost: Free for anyone who has problems hearing on the phone for any reason
  - ClearCaptions is a free captioning service that works together with your phone and your Internet-connected computer.

## Section 6: Virtual Meetings

- Google Hangouts
  - <http://www.google.com/hangout>
  - Cost: Free
  - Google hangouts provide video-chat for a group of up to ten people. Users can video change and screen-share. Requires a Google Plus account.
- Skype
  - <http://www.skype.com>
  - Cost: Free for video-chat and toll-free calls; low-cost calls
  - Skype provides users with video-chat and screen sharing capabilities. Skype can also be used to call toll-free numbers for free and toll numbers for a modest fee.

## Section 7: Collaborative Documents

- Google Drive
  - <http://www.google.com/drive>
  - Cost: Free
  - Google Drive (formerly Google Docs) provides users with a way to share and collaboratively edit word processing documents, spreadsheets, and presentations. Users can share any type of file but only supported documents may be edited.
- SkyDrive
  - <http://www.skydrive.com/>
  - Cost: Free for 7GB
  - SkyDrive enables people to collaborate and share documents (and other files) and natively use Microsoft Word, PowerPoint, Excel, and OneNote as powerful collaboration tools. OneNote is really great in keeping track of notes and other data, so we would recommend taking a look at it if you have at Microsoft Office installed (and note, there are mobile apps, such as iOS and Android for OneNote as well).
- Dropbox
  - <https://www.dropbox.com>
  - Cost: Free for 2GB storage space
  - Dropbox allows users to sync files and documents across many devices and maintain a cloud backup. Files can also be easily shared with others.
- Prezi
  - <http://www.prezi.com>
  - Free for core features and 100MB storage; students and teachers receive extra features and 500MB storage for free; additional features available for purchase
  - Prezi is an online presentation tool that helps users create unique and interactive presentations. Prezi is a great way to represent information in a unique and understandable way.

## Appendix B: References

“Being an Effective LGBTQA Leader.” Tim Valentine, Angie Wellman, Ohio State University. Received February 2011.

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“Leadership Transition Packet.” Daniel Ostick, The University of Maryland, College Park. Received November 2011.

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“Introduction to Resume Writing.” University of Michigan College of Engineering Career Resource Center. Accessed January 16 2013.

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## Appendix C. Creating a Corporate Information Packet

Your Corporate Information Packet should inform potential corporate sponsors about your chapter. Most of your document should be dedicated to conveying enough detail to address the question: Why should the corporation provide sponsorship for your oSTEM chapter?

By giving this packet to recruiters, you are asking for support - whether it be in the form of funding, giveaways, collaboration for an event, or in-kind donations. In order to be sponsored, it is important to efficiently and clearly state what you will provide those sponsors or partners. Branding? Other visibility? Resumes for potential internships? Similar to a resume and elevator pitch, your Corporate Info Packet is an opportunity to “sell” your chapter. Feel free to use this for ideas, but please do not copy text directly from this guide. Be creative and make your chapter’s packet unique!

### Suggested Layout:

Below is an example layout for your corporate information packet. Please feel free to make any necessary changes to tailor the packet to your chapter. Remember, this is only to help you get started.

- Title Page
  - Advice: Give your document a straightforward name.
  - Ask yourself: How would you want to see your chapter presented to a corporate professional?
- Personal Letter
  - Take the opportunity to introduce the President and/or Treasurer, as well as the organization and the goal of the Packet.
- Table Of Contents
  - Have this well formatted with page numbers to give a professional look.
- History of oSTEM Incorporated & Your Chapter
  - Include a little information about the national organization, but focus on the history of your chapter. Include major annual events.
  - Recent Outcomes
  - Future Outreach, Events, Opportunities
  - Goals for Upcoming Year
- Information about your oSTEM board (Structure, Function, Members)

- When appropriate, highlight board members who are academically invested in a field related to the corporation's focus.
- oSTEM Mission
  - This section should parallel the national board's mission. See earlier sections of the handbook for mission statement details.
- Chapter Demographics and Statistics
  - How large is your chapter? Core membership and event attendance numbers are both helpful.
  - Useful demographics include majors and year in college. One useful way to present this data is to aggregate data for areas of study and break down the category by field, i.e. a physical and life sciences category can show the number of biology, chemistry, and physics majors.
  - If you have an ethnically diverse group, you may highlight these demographics as well.
- Events & Budget
  - List your annual events, including upcoming activities and expenditures. After giving a list, provide a brief explanation and the amount, cost, and location.
  - Possible events to include:
    - oSTEM 3rd National Meeting - October 2013
    - Other conferences (see Section 3 for conference planning information)
    - Any Other Events Your Chapter Participates In
- Sponsorship Levels (suggested tiers)
  - Here, you should offer incentives for the corporation. Companies want to see what you will offer them, such as members' resumes, logos on shirts, emails, posters, specific event collaboration, etc.
  - Suggested tiers of sponsorship:
    - Executive Sponsor \$5,000
    - Innovation Sponsor \$2,500
    - Professional Development Sponsor \$1,000
    - Networking Sponsor \$500
    - In-Kind Contributor \$250
- Thank You Statement
- LGBT Terms & Definitions
  - This section can be helpful because many people may not know what LGBT means, or that the word "Queer" can be acceptable, or the differences between Gender Identity & Sexuality.



## Appendix D. Mission Statement Suggestions for Chapters

Out in Science, Technology, Engineering & Mathematics (oSTEM) is a national student society, dedicated to increasing the participation of people who identify with lesbian, gay, bisexual, transgender, queer, or ally (LGBTQA) communities in disciplines related to science, technology, engineering, or mathematics (STEM).

Some goals of an oSTEM chapter should be:

- (a) To serve and affirm people who identify as LGBTQA.
- (b) To promote the participation from and development of LGBTQA communities in STEM disciplines.
- (c) To educate and develop students of STEM disciplines, preparing them for graduation.
- (d) To support and contribute to the dynamic network sustained by oSTEM Incorporated.
- (e) To provide education, outreach, and professional resources to local high schools when appropriate.
- (f) To actively recruit and address the needs of diverse LGBTQA groups within the University community, inclusive of those who are historically underrepresented with regards to gender, gender identity or expression, and ethnic background.

### **Abbreviated Version:**

*To educate and foster leadership among LGBTQA students in the STEM fields.*

## Appendix E. Chapter Constitution Template

[[Replace with your chapter logo or add appropriate text here.]]

### SAMPLE Constitution and Bylaws

#### ARTICLE I - NAME AND LOGO

1. This organization shall be known as the [INSTITUTION] chapter of Out in Science, Technology, Engineering, & Mathematics.
2. The name of this organization shall be Out in Science, Technology, Engineering, and Mathematics, or oSTEM@[INSTITUTION] (heretofore referred to as oSTEM@[INSTITUTION].)
3. In all advertising efforts, oSTEM@[INSTITUTION] shall use a logo with the chapter name prominently displayed.

#### ARTICLE II - PURPOSE

1. Out in Science, Technology, Engineering, and Mathematics is a national LGBTQ-affirming organization that aims to provide services and support for students in science, technology, engineering, and mathematics and to create a dynamic network between students and professionals in industry and academia.

#### ARTICLE III - MEMBERSHIP

1. Membership shall be aimed at supporting students, but shall also remain open to all faculty, staff, and alumni at [INSTITUTION]
2. oSTEM@[INSTITUTION] shall abide by all federal, state, and local laws and shall be responsible for its own actions, acting legally independent from oSTEM Incorporated.
3. oSTEM@[INSTITUTION] shall abide by all policies set forth in the Non-Discrimination Policy of [INSTITUTION].

## ARTICLE IV - FINANCES

1. Dues may be collected for the [INSTITUTION] chapter, and as required by the national organization.
2. The treasurer must maintain one or more accounts with [INSTITUTION], in order to accept financial transactions from sponsors.
3. By a majority, the Executive Board of oSTEM@[INSTITUTION] must approve any expenses for the chapter.

## ARTICLE V - EXECUTIVE BOARD

### Section 1 - Positions:

1. The elected officers of oSTEM@[INSTITUTION] shall be: President, Vice-President, Treasurer, Community Outreach, and Engineering Outreach. *[These are just examples. Other structures could include Co-Directors.]*

### Section 2 - Requirements:

1. Only members who have participated in at least three non-executive meetings/events are eligible to hold office and vote in elections.

### Section 3 - Elections:

1. The officers of this organization shall be elected annually at a general meeting of the active membership in the third week in November (right before Thanksgiving break). *[We suggest transitioning your Board during the winter break. It can be very difficult to start from scratch in September, since the previous Board members may have already graduated!]*
2. A majority vote shall be required for elections. If no candidate for an office receives a majority vote by the second round of voting, the candidate receiving the lowest number of votes for that position shall be dropped from each consecutive ballot until one candidate receives a majority of the votes.

### Section 4 - Term of Office:

1. Interim executive board meetings are the four executive board meetings immediately following the elections. There will be two meetings before winter break and two

meetings when the Spring semester begins. During these meetings the exiting board shall train the newly elected board on the duties for which they will be responsible.

2. Officers shall be elected for one year. Their term begins [[Set a formal date and stick by it as much as possible.]]

#### Section 5 - Vacancy in Office:

1. A vacancy in any office, other than that of President, shall be filled by appointment by the President with the majority approval of the Executive Board.
2. Should the office of President become vacant, the Vice-President shall automatically become President.

#### Section 6 - Duties:

1. Executive Board:
  - 1.1. These officers shall serve on the Executive Committee, perform the duties prescribed in these Bylaws, and perform such other duties as are directed by the organization.
  - 1.2. Each officer is required to volunteer for at least one hour at the engineering open house.
  - 1.3. The Board will hold bi-weekly meetings, which shall be attended by all officers unless acceptable notification is given. All members must arrive on time and be prepared for the meeting.
  - 1.4. The Board must plan and execute bi-monthly general body meetings.
2. President:
  - 2.1. Plan bi-weekly meetings
  - 2.2. Manage Google account for oSTEM communications and documents
  - 2.3. Seek Sponsorships from local or national corporations
  - 2.4. Allocate extraneous tasks to other board members
  - 2.5. Manage live agenda, contacts, and sponsorship
3. Vice-President:
  - 3.1. Take notes at each meeting
  - 3.2. Keep a record of oSTEM's activities and take responsibility for picture taking
  - 3.3. Update and maintain oSTEM website
  - 3.4. Send out bi-weekly emails
4. Treasurer:
  - 4.1. Attend Financial workshop at the beginning of the semester
  - 4.2. Keep a Ledger of oSTEM's finances

- 4.3. Submit reimbursement forms for events, food, etc.
- 4.4. Oversee financial dealings
- 5. Engineering Outreach:
  - 5.1. Attend monthly Engineering Council meetings
  - 5.2. Responsible for making sure oSTEM fulfills requirements to stay in the Engineering Council
  - 5.3. Maintain and encourage contact with leaders of other RSO's affiliated with the Engineering Council
  - 5.4. Take notes and inform the Executive board of EC happenings
  - 5.5. Facilitate interaction with of other EC organizations
- 6. Community Outreach:
  - 6.1. Lead in planning Volunteering, Community Outreach, and Social Events
  - 6.2. Responsible for oSTEM Tabling
  - 6.3. Maintain contact with the LGBT office and the leaders of its affiliated RSO's
  - 6.4. Attend LGBT round-table meetings and take notes

#### Section 7 - Misconduct

- 1. A member of the Executive Board may be removed from their office due to gross dereliction of their duties as outlined in this Constitution. A vote of no confidence by all other members of the Executive Board shall constitute an Executive board member's removal from office.

### **ARTICLE VI - METHOD OF AMENDING BYLAWS**

#### Section 1: Amendments

Proposed amendments to these bylaws shall be submitted in writing. The proposed amendments shall be submitted for review to the Executive Committee, which will present the proposal along with its recommendation to the general membership. A two-thirds vote of the general membership, as described for the status of a voting member, present shall be necessary for adoption of any bylaw amendment.

## Appendix F. University Thank-You Template

[[Replace with your chapter logo or add appropriate text here.]]

---

[[DATE]]

[[CAMPUS OR CORPORATE ADDRESS]]

Dear [[NAME]],

The [[UNIVERSITY]] Chapter of Out in Science, Technology, Engineering, and Mathematics (oSTEM), would like to convey our most sincere appreciation for your support. Without your contribution, we would not have been able to attend the [[CONFERENCE NAME]] conference.

oSTEM was represented at the conference by one undergraduate student and three graduate students, and each one's Department played an important role in funding this conference. We have returned to [[UNIVERSITY]] with skills that will enrich the University community through enhanced leadership and programming. In addition, we believe that through our members, academic departments will gain important resources that will foster the professional development and education of other lesbian, gay, bisexual, transgender, queer, and ally (LGBTQA) students.

Included with this letter are details about the conference, including: a general schedule, a list of the plenary speakers, a complete listing of the concurrent workshop sessions, a list of the evening receptions, and a summary of each day at the conference. Each component of the conference played a vital role in educating our members for effective leadership and programming skills.

For your records, we are also including receipts for all of our expenses – excluding bus fare, fleet vehicle costs, and meals. We have included: receipts for the parking, airfare, hotel, taxi, and registration, in addition to the boarding passes for each of our members – as required by [[FUNDING GROUP]].

Again, thank you for your support! Should the opportunity arise to discuss LGBTQA topics in your Department, please contact us by emailing the group president at [[EMAIL]].

Sincerely,

CONFERENCE ATTENDEES [[NAME, YEAR, MAJOR, DEGREE]]