



Local Chapter Organization

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Local Chapter Organization

ROLE OF THE ADVISER

The success of FBLA-PBL rests on the shoulders of student members. However, without the guidance of the local chapter advisers, no success would be possible. The adviser is instrumental in organizing and stimulating chapter development. They gain the support of the campus administration and community leadership. The local chapter adviser should:

- Be knowledgeable about the history, bylaws, and programs of the national organization for active operation of the local chapter. All of this information may be found in the National Programs and National Organization tab of this *Chapter Management Handbook*.
- Organize the selection process for chapter officers.
 - Depending on the size, most chapters have five to seven officers. The two officers necessary for the proper operation of the chapter are the president and the secretary.
 - Most chapters elect local chapter officers in the spring of the year, but the election may occur at the beginning of the school year. Nominations are normally taken from the membership at one meeting, and each candidate presents a speech (typically 1-2 minutes in length) at the next meeting. Depending on the local chapter bylaws, members may either vote on the candidates by a ballot vote, a hand vote, or by a voice vote.
- Provide for the training of local chapter officers.
 - Oftentimes, this is a one-day event that can be held on a weekend or in the summer before the new semester starts.
 - Start out with an icebreaker that emphasizes the importance of teamwork such as the one below.
 - Establish rules and guidelines that will help

students lead themselves while remaining consistent with school policies and state and national bylaws.

The Web. (You will need a large ball of yarn for this icebreaker.) The group stands one large circle. The leader begins the game by asking a question such as, “What is the one goal that you have for the local chapter officer team this year or that you would like to accomplish as an officer?” The leader answers the question first, and then tosses the yarn ball across the one of the officers while holding on to the end of the yarn. The person answers the question, holds a piece of the yarn, and then tosses it to someone else. The game continues in the same fashion until everyone has shared. By tossing the yarn around the group, the officers weave a Web that connects the entire team in some manner. The leader can ask as many questions as appropriate. The leader then asks one or two officers to drop the yarn. The Web begins to sag and appears to be very weak. The leader can then discuss how important each officer is to the team and the effect that low levels of involvement and commitment has on the entire team. At the end, the group can kneel down and place the Web on the ground. This works well to lead into a discussion on teamwork, officer expectations, and duties. Officers can cut a piece of the string from the Web to keep as a reminder of the exercise or the thoughts that the team shared.

- Plan the year during training – prepare the Program of Work. (See the Program of Work section in this tab, page I-14, for more detailed ideas as to

how to go about planning for the year.) One or two activities should be planned for each month. A sample of a Program of Work is below.

August

- Local Chapter Officer Training Meeting and Program of Work Planning Session
- Prepare FBLA-PBL recruitment message board

September

- Plan a Membership recruitment activity such as a Back to School picnic
- Publicize FBLA-PBL through business letters, posters, and flyers to business students and to incoming Freshmen

October

- Sponsor a community service project
- Submit initial dues by the October 20 membership deadline
- Plan a Fall social activity such as a Halloween party.
- Conduct an officer and new member installation ceremony – invite a state officer or business person to be a guest speaker
- Submit an article for the *PBL Business Leader* and your state newsletter

November

- Plan a fund-raising project such as a bake sale
- Plan a project to celebrate American Enterprise Day – November 15
- Attend the National Fall Leadership Conference

December

- Plan a holiday party for members
- Urge community business people to join the Professional Division
- Plan a canned food drive or toy drive

January

- Plan a second semester recruitment drive
- Conduct local practice competition
- Hold a mid-year planning session with officers (Recap 1st semester and plan 2nd semester)

February

- Celebrate FBLA-PBL Week
- Plan a job shadowing activity or a business tour
- Sponsor a Valentine’s Day social for residents of a nursing home
- Invite a guest speaker to a chapter meeting

March

- Plan a second semester fundraiser such as a community-wide talent show
- Plan a Spring social activity
- Invite faculty to a chapter activity

April

- Attend the State Leadership Conference

- Sponsor a car wash
- Sponsor an Easter Egg Hunt for elementary children

May

- Elect new officers
- Sponsor a FBLA-PBL Spring Awards Banquet
- Plan an end-of-the year trip

June/July

- Attend Institute for Leaders
- Attend the National Leadership Conference

- Don’t forget to include “fun” activities for members at meetings. See below for a fun meeting activity to get members meeting to network.

Sing a Tune. Each member receives a slip of paper with a song title on it, with about four or five people receiving the same song. They don’t show their song to anybody. Instead, they hum their song, walking around the room trying to find other people humming the same song.

- Prepare a budget during training (a sample budget may be found in the fundraising section of this handbook, page III-9.)
- The following local chapter officer check list should be followed:
 - Local chapter officers are well-educated about Future Business Leaders of America-Phi Beta Lambda and understand its purpose and programs/opportunities available.
 - Each local officer has clearly-stated goals and a job description of responsibilities. This will ensure that the person holding the office knows the responsibilities of the job. This also provides the basis for evaluating the performance of the officer and establishes what is important in the total organization so that resources can be organized accordingly.
 - Each officer receives proper training.
 - Officers plan all activities and projects well in advance and with complete adviser approval. Remember that this is a student organization; have them do the work!
 - Help the President delegate tasks among all the officers.
 - Officers run interesting, organized, and well-planned meetings.
 - Officers have established a well-functioning committee system.
 - Officers have effective communication with the local chapter adviser. (Oftentimes, it helps to establish officer in-boxes or mail boxes in the business room. Officers should be in the habit of checking these daily.)

- Local chapter officers are interested in participating in regional/district, state, and national activities and conferences.
- Meet at least once a month prior to the regular chapter meeting – set a particular date each month to meet.
- The officers have effective communication with the student members. The communication exercise to the right can be used at the beginning of a meeting to emphasize the importance of communication and listening skills in an organization. Tell the members that they have only 10 minutes to complete this quiz. They should try to answer as many questions as possible. Once members have completed this exercise, discuss the purpose of the quiz and the importance of following directions in relationship to being organized.
- The adviser and the officers set goals at the start of each semester both for the chapter through a program of work and for the members through a point system and measure their achievement. See the point system below for an idea. This system may be used to choose representatives to attend conferences or to decide how to split any funding.

Sharpshooting Quiz

1. Read everything before doing anything.
2. Put your name in the upper right hand corner of the paper.
3. Circle the word “name” in the second sentence.
4. Draw five small squares in the upper left hand corner of the paper.
5. Put an X in each square mentioned in number 4.
6. Put a circle around each square.
7. Sign your name under the title of the page.
8. After the title, write “yes, yes, yes.”
9. Put an X in the lower left hand corner of the page.
10. Draw a triangle around the x that you just made.
11. Draw a circle around the word “paper” in sentence 4.
12. Loudly call out your name when you get to this point of the test.
13. If you think that you have carefully followed the directions, call out “I have.”
14. On the reverse side of this paper, add 107 and 278.
15. Put a circle around your answer to this problem.
16. Count out in your normal speaking voice from 1 to 10 backwards.
17. Yell out, “FBLA-PBL is the best.”
18. Underline all even numbers on the left side of this page.
19. If you are the first person to get this far, call out loudly, “I am the leader in following directions.”
20. Now that you have finished reading carefully do only sentences one and two.

Point System

A point system is helpful in the analysis and evaluation of the participation of each member. It will be used as the basis for attendance at the leadership conferences, awards, and other activities.

The following is a list of activities and suggested points for each:

Attendance at General Meetings	20
Contestant in Competitive Events	20
Assistance with Fundraising Activities	20
Assistance with Committee Work	20
Attendance at Special Events	10

Trips, Guest Speakers	10
FBLA-PBL Sponsored Activities	10
Attendance at State Events	10
Attendance at Workshops	10
Attendance at State Executive Board Meetings	10
Attendance at Leadership Conferences	10
Social Activities	5

Bonus Points Available for the Following:

Holding an Elected Office	20
Committee Chairperson	20

- Hold regular chapter meetings and see that they are conducted in a business-like manner.
 - Most chapters hold monthly meetings.
 - Normally an agenda is prepared for the meeting.
 - See the section on meetings in this tab.
- Assist members with the planning, collecting, preparing and arranging of brochures, posters, flyers promoting the chapter. Below are some ideas for message boards – see the public relations section of this handbook for poster and flyer ideas:

FBLA-PBL – Stepping Stones to Success.

Decorate board with blue paper background for the pond. Cut circles out of brown construction paper to go across the pond. Put different words on the stones (Leadership, Teamwork, Awards, Scholarships, Conferences.) Place fish cutouts and frog cutouts throughout. Cut out green construction paper for grass surrounding the pond. Put the title: FBLA-PBL – Stepping Stones to Success at the top.

Soar to New Heights with FBLA-PBL.

Decorate board with blue paper and create clouds from white construction paper with different phrases related to FBLA-PBL printed on each cloud. (Service, Leadership, Progress.) Then cut out different colored hot air balloons and decorate them with each of your FBLA-PBL member’s names or the names of chapter officers. Leave room to attach some photos of chapter activities. Put the title Soar to New Heights with FBLA-PBL at the top.

Moving Into the New Year with FBLA-PBL.

Decorate your board like a pasture (blue background paper and green construction paper for grass.) Add cow cut-outs with the names of different chapter activities that you are planning throughout the year (Business Tours, State Conference, National Leadership Conference, March of Dimes WalkAmerica, etc. If you have pictures of some of last year’s activities, add them to the board along with information on how to join the chapter.

- Ensure that the campus administration, faculty, students, and public are informed of chapter activities and outstanding student achievements.
- Be knowledgeable of the guidelines for state and national competitive events and activities and coordinate participation at all levels.
 - You may buy study guides and test samples from the MARKETPLACE.

- Oftentimes, teachers give students textbooks to study. You may also order examination copies of text books. These books often contain study guides and test banks which may prove helpful.
- Start having students sign up for competitive events in October. It is often helpful to give students a list of each competitive event and a brief description of the what will be tested in the event.
- Plan group study sessions – make it fun by providing pizza.
- Oversee financial development projects.
- Supervise the receipt, recording, depositing, and expenditure of chapter funds.

In addition, chapter advisers who accompany students to conferences have the following responsibilities:

- Know the whereabouts of their students at all times.
- Maintain emergency contact information (including the medical release form found in the National Programs section of this *Chapter Management Handbook*, page VII-7.)
- Ensure that students display proper conduct and appearance at all times.

Finally, local chapter advisers are encouraged to implement the following chapter management tips:

- Set long-term and short-term goals for the chapter with the local officers. Goals are specific, realistic, reminders of the accomplishments that you visualize for the officers and the chapter. This is a great activity to do with officers during training before they start working on the Program of Work.
 - Brainstorm what your group wants to do.
 - What is the purpose of FBLA-PBL?
 - What is the mission of FBLA-PBL?
 - What are the expectations of the chapter from the perspective of the members, the officers, adviser, and supporters?
 - Set both short-term objectives (for this week), and long-term objectives (for this semester and for this year)
 - Write these goals down, listing each in order of priority.
 - Choose activities that achieve your objectives. This means that you must consciously choose to do those things that relate to your most important goal.
 - Now list the advantages and disadvantages of each goal and activity.
 - Now you are ready to begin your program of work.

- Teach students to develop a program of work as a basis for chapter management.
- Delegate assignments to student members that match their abilities, along with the authority to get the job done.
- Agree on priority rankings for assignments given to members.
- Set deadlines for completion of member assignments.
- Ask for periodic progress reports.
- Evaluate the member's work as it is completed.
- Establish a daily schedule or daily plan of when and where the officers and members can contact the adviser. This will help cut down on interruptions.
- Use a message board or central meeting place for members to seek out information on chapter activities and programs.

OFFICER ROLES

Well-qualified and dependable officers are crucial to the growth of any FBLA-PBL chapter. Effective leaders will:

- Provide an environment where all members will grow professionally.
- Include all members in a dynamic program of work.
- Welcome suggestions from members.
- Keep the members informed about all activities of the organization.
- Conduct the business of the chapter in proper parliamentary procedure.
- Maintain complete, current records and minutes.
- Evaluate each meeting and give the resulting information back to the group.
 - Each meeting was scheduled in advance and the time, date, and place was posted.
 - An agenda of each meeting is distributed to all members in attendance. (See page I-11.)
 - All the officers know their roles and responsibilities regarding the conduct of the meeting.
 - The meetings start and close on time.
 - Committee reports and treasurer's and secretary's reports are given regularly and effectively.
 - People were interested and involved.
 - We were task-oriented and got all business completed.
 - We planned some sort of "fun" activity or ice-breaker to get members involved.

– Members were able to voice their opinion on projects.

- Encourage individual and chapter participation in conferences at the regional/district, state, and national levels.
- Develop and implement a strong publicity program.

The election of officers is a serious matter, not a popularity contest. Qualifications should be the primary consideration. Candidates who are willing to accept a leadership role and work hard in the preparation to perform their duties will make the most effective leaders.

An adviser may want to consider having officer candidates fill out an application form rather than being nominated from the floor. Either way is acceptable, but oftentimes you get more serious candidates if they have to complete an application form prior to running or a local office. See the sample at the end of this section for an application form, page I-21.

Once the adviser has screened and approved the applications, candidates should be notified that they have met the requirements for running for office. In the next meeting following the approval, a slate of approved candidates can be presented so that the members know who is running for each office. In the next meeting, you could have each candidate submit a 1-2 minute speech and then have the members vote. Either a hand-vote, voice vote or a ballot vote is acceptable. Refer to your local chapter bylaws to see if they refer to election procedures. If they don't specify anything, you may choose any of the above options.

A short description of the duties of each officer follows.

President

- Presides over and conducts meetings according to accepted parliamentary law.
- Keeps members and discussion on track.
- Appoints committees and serves as an ex-officio member to each.
- Coordinates chapter activities by keeping in close touch with the other officers, the membership, and the adviser.
- Calls special meetings as needed.
- Sees that the Monthly Chapter Report (see report sample in forms section in this tab, page I-23) is prepared by the secretary and news releases are prepared and mailed by the reporter.
- Reviews the Program of Work with the adviser and the officer team on a monthly basis.

- Maintains chapter correspondence by writing appropriate letters.
 - Letters should be short and to the point (3 or 4 paragraphs.)
 - Letters must be free of typographical errors and spelling errors – always have your adviser proof-read anything before it is sent out.
 - Thank you letters should be sent within one week of the event.
 - Some target groups for letters could be sent to professional members either as a thank you or to recruit them in to the chapter. Letters can also be written to national, state, and municipal governments in support or non support for legislation such as Perkins Funding, request for recognition, and request for information. (See sample of a professional member thank you letter at the end of this section, page I-22.)
- Coordinates chapter efforts by keeping in touch with officers, members, and advisers.
- Shows interest in the activities of the other officers and inspire them as well as the membership to better serve the chapter.
- Encourages public relations in your community by contacting speakers or guests for chapter meetings. Be sure to have the secretary follow up with thank you letters following a presentation or guest appearance at a chapter meeting or activity.
- Represents the chapter at special school events, civic clubs, and other out-of-school organizations.
- Submits news releases when your chapter shows success at a conference or other events.
- Maintains a good working relationship with your chapter adviser.

Vice President

- Assists the president in the discharge of duties.
- Presides at meetings in the absence of the president.
- Is prepared to assume the duties and responsibilities of the president if the need should arise.
- Oversees all committee work and the management of assignments.
- Serves as an ex-officio member of chapter committees.
- Prepares the Local Chapter Annual Business Report.
- Plans icebreakers such as the one below for local chapter meetings.

Straw Tower. The group is divided into four or five teams, depending on the size of the meeting. Each team is given straws and tape and the challenge to build the tallest tower against each group. After 10 minutes, call time and see which group has the tallest tower. Award a prize to the winning group.

Secretary

- Prepares the Program of Work once it has been approved by the local chapter adviser.
- Prepares and reads the minutes of each meeting.
- Prepares the Monthly Chapter Report and submits it to the president, the vice president, the reporter and the adviser. Keep one copy for your records. See the sample at the end of this section. This report helps the vice president prepare the Local Chapter Annual Report at the end of the year.
- Minutes are the official record of what went on during a chapter’s meeting. Without them, your chapter would have no way of determining exactly what its members have agreed to do.
- Each paragraph of the minutes should contain a separate subject. Keep them concise and easy to understand.
- Do:
 - Include the name of the person who made the motion.
 - Record the motions exactly as how they were stated.
 - Remember to sign the minutes after they have been approved.
 - Include the exact results of a counted or ballot vote.
- Don’t:
 - Include the name of the person who seconded the motion.
 - Write down who debated or what they said
 - Include your personal opinions.
 - Summarize a guest speaker’s topic. Just list the name and the subject.
- The first paragraph of your minutes should be one sentence and include the following in this order.
 - The type of meeting – whether regular, special, etc. (Most chapter meetings are regular meetings)
 - Name of organization.
 - Time, date, and place of meeting.

- Whether the president and secretary were present. If not, name(s) or person(s) who substituted for them.
- Whether the minutes were approved as read or corrected.
- The last paragraph of the minutes contains only the time of adjournment.
- A sample format of minutes may be found under the parliamentary procedures section in this tab, page I-12.
- Provides the president with an agenda for each meeting. A sample agenda can be found in the Chapter Meetings tab of this section, page I-11.
- Counts and records votes when taken.
- Coordinates and keeps track of the local chapter point system.
- Reads correspondence at local chapter meetings.
- Prepares correspondence for the chapter president.
- Make sure that letters are easy to read – short sentences, three paragraphs, logical sequence of ideas.
- Make sure that your letter sounds sincere, friendly, and positive.
- If you are doing a memo, sign your initials next to your name in ink.
- The body of the memo should be single spaced with double spacing between paragraphs.
- Do:
 - Use chapter letterhead if you have it.
 - Be neat.
 - Use proper style.
 - Proofread – always have your local chapter adviser proofread and approve any correspondence before it is sent.
 - Make copies of all of your correspondence for later records and for your adviser.
- Don't:
 - When referring to FBLA-PBL, don't use club; use organization, chapter, or association.
 - Don't use convention; use conference.
 - Don't use problems or obstacles, use challenges.
 - Don't sign letters in pencil; use pen.
- A budget is necessary in the operation of a FBLA-PBL chapter.
- There are two different areas of the budget: income and expenses.
- Keeps an accurate count and roster of the chapter membership.
- Writes receipts for ALL members when they pay their dues.
- Receives and acts as custodian of chapter funds.
- Collects all state and national dues and is responsible for their disbursement by the appropriate deadlines.
- Keeps financial records neat and current. (Fundraising Tab, page III-4.)
- Plans, with the assistance of the members and the adviser, appropriate fund-raising activities.
- Handles the chapter's accounts receivable and accounts payable.
- Encourages efficient money management.
- Prepares monthly financial reports for each meeting. (A sample report can be found in the fundraising tab, page III-4.)

Reporter:

- Develops media lists for chapter meetings.
- Plans public relations activities for the chapter.
- Gathers and classifies chapter news.
- Prepares new releases and articles for publication in school and local newspapers and in state and national FBLA-PBL publications. (See the public relations tab of this *Chapter Management Handbook* for a sample of the proper news release format, page IV-8.) Remember to include the facts of your story:
 - What: Business meeting, social, speaker, or other activity
 - Who: Names of the organizations and people involved, such as committee chairperson, elected officers, and speakers.
 - When: Date a time of meeting or activity.
 - Where: Location of the event.
 - Why: Purpose of the activity or meeting.
 - How: Details of how the activity was carried out.
- Prepares news for the FBLA-PBL national Web site.
- Assists with the planning and arranging of chapter exhibits.
- Prepares a local chapter newsletter at least twice a year for members.

Treasurer:

- Prepares the chapter budget for the year. A sample budget can be found in the fundraising tab, page III-9.

- Prepares and updates the local chapter Web site. Sends site link to the national center.

Historian

- Files clippings and pictures of the chapter's activities in the chapter files.
- Keeps all chapter files updated on an on-going basis.
- Keeps a chapter publicity and activity scrapbook.
- Prepares an electronic slide show presentation for the end-of-the year meeting or awards banquet.
- Helps the Vice President with the Local Chapter Annual Business Report.
- Prepares monthly message boards with chapter photos, minutes, and projects.

Parliamentarian

- Assists chapter members in understanding the basic purpose of parliamentary procedure.
- Is prepared to advise the president and other chapter members on parliamentary procedure.
- Has referenced materials pertaining to parliamentary procedure available for each meeting.
- Watches for significant irregularities in parliamentary procedure and calls them to the attention of the chair.
- Encourages participation in and prepares a team for the parliamentary procedure competitive event.

CHAPTER MEETINGS

Meetings are the forum in which ideas are brainstormed, decisions are made, and events planned. Always have clear objectives. Well planned and regularly scheduled meetings maintain member interest, ensure participation, and promote the general welfare of FBLA-PBL. They are held to conduct business or to present a specific program; however, they should be organized so that they are not for information only, but are also opportunities for members to become involved and to share their thoughts. In the fall, many chapters install their officers and have a guest speaker. The installation ceremony can be found later in this section. Remember to maintain a balance between business and social activities. The following check list should be kept in mind:

- Do we hold regular meetings?
- Do we have a written agenda for our meeting?
- Are minutes recorded and read at our meetings?

- Do we allow adequate time for our meetings?
- Do we make assignments during meetings?
- Do we follow through with our assignments?
- Do all participants at our meetings have equal opportunity?
- Do we encourage new members of our group to participate?
- Do we teach and demonstrate correct leadership principles?
- Do we assume our full responsibility?
- Do we conduct progress reviews to check our accomplishments?
- Do we accept the responsibility for our failures?
- Do we make a sincere effort to understand members' needs?
- Do we recognize and compliment others for their efforts?
- Do we do adequate advanced planning?
- Do we delegate responsibility and authority?
- Do we set worthwhile goals?
- Do we actively seek the general membership opinion?
- Do we communicate our goals and activities to the membership?
- Do we enjoy our assignments?
- Do we start and end our meetings on time?
- Do we hold a officer meeting before every general meeting?
- Do we prepare in advance of the meeting any motions that are known to be necessary?

The Agenda

An agenda should be prepared for every meeting and distributed to all in attendance. It provides a framework for discussion. First, determine an overall objective for the meeting. If there is no purpose there should not be a meeting. Then, brainstorm specific items of business that need to be covered. Referring to the previous meeting's agenda, minutes, and suggested order of business is an organized way of determining those specifics.

Clarify, combine, and prioritize, keeping in mind the element of a time limit. Follow a set order of business in determining the placement of each of the items on the agenda.

Near the end, review important dates and decisions

made. Always remember to thank those present for attending and participating and tell them that you look forward to seeing them at the next meeting. A sample agenda is below:

Meeting Agenda

- Call to order – by the president – signals the meeting will begin. It is followed by one rap of the gavel.
 - Opening Ceremony (optional – Recite FBLA-PBL Creed or Pledge of Allegiance)
 - Roll Call of members
 - Approval of Previous Meeting’s Minutes – by the secretary
 - Distribute minutes before the meeting members to review
 - Read minutes to group
 - The president will ask for corrections or additions and the Secretary will note the necessary corrections.
 - Financial Report – by the treasurer
 - Read treasurer’s report to group.
 - Officers’ Reports – given by the officers in the order that they are listed in the bylaws.
 - Committee Reports
 - Standing committees – committees that are listed in the local bylaws.
 - Special committees – committees that were given one specific topic to investigate.
- ** Note: Committee chairman gives the report and may make a recommendation or motion on behalf of the committee.
- Unfinished Business and General Orders
 - Pending questions from the last meeting.
 - Questions postponed to this meeting.
 - New Business
 - Itemize – new topics brought up for the first time.
 - Announcements – anyone with any announcements may make them.
 - Adjournment – signal by the presiding officer that the meeting is over, followed by final rap of the gavel.

Minutes

The record of the proceedings in a regular business meeting is called the minutes. The secretary should always record what was done at the meetings and what was said. The following should be included:

- The wording of each motion
- The disposition of each motion.
- The name of the mover.
- Points of order and appeals sustained or lost (including the reasons given by the chair for the ruling)

See the sample minutes on the next page for a reference.

PARLIAMENTARY PROCEDURE

Parliamentary procedure is a formal system of rules and practices that balances the rights of individuals and subgroups with an organization’s membership. Application of parliamentary procedure enables organizations to accomplish the following:

- Maintain orderly meetings
- Protect the rights of the absentee, individual, minority, and majority
- Allow every opinion to be heard and considered
- Enable the majority to rule
- Determine the general will on a maximum of question in the minimum of time.

Twelve General Rules

1. The presiding official must recognize a member before he or she may speak.
2. A member should rise to be recognized and remain standing while speaking.
3. All remarks made from the floor should be addressed to the presiding official instead of to another member. Do not use a previous speaker’s name but refer to him or her as the “previous speaker.”
4. Only one motion may be made on the floor at one time. It must be disposed of before another main motion is made.
5. A main motion must be seconded and stated by the presiding official before it may be discussed.
6. The maker of the motion has the first right to debate.
7. In debate, each member has the right to speak twice on the same motion, but cannot make a second speech on the same motion as long as any member who has not spoken on that motion desires to speak.

8. Debate must be limited to the immediately pending motion. If an amendment is pending, the main motion cannot be discussed; all discussion must be about the amendment.
9. In case of a tie vote, the motion is lost.
10. The presiding official may vote to break a tie. The presiding official always votes in case of a ballot vote.
11. A majority is over half of the members present and voting.
12. A plurality is the largest number of votes to be given any candidate or proposition when three or more choices are possible.

Classification of Motions

The word **motion** refers to a formal proposal by a member suggesting that the assembly take a certain action.

Motions are classified into the following five groups:

1. Main motions
 - original main motions
 - incidental main motions
2. Subsidiary motions
3. Privileged motions
4. Incidental motions

Stanly Community College PBL Local Chapter Regular Meeting: Minutes

Call to Order

The first regular meeting of the Stanly Community College Chapter of PBL was held on August 25, 2004, at 4:30 p.m. in Room 201 of Stanly Community College, in Albemarle, North Carolina. President Andrew Gold was in the chair and the secretary was present.

Minutes

The minutes of the previous meeting were approved as read.

Officer Reports

The treasurer reported a balance of \$3,568.35. The report was placed on file.

Committee Reports

Standing Public Relations Committee Chairman Marissa Kleckner reported the FBLA-PBL exhibit had been completed and was on display in the campus library. This exhibit will also be displayed during Rush Week. Members were asked to see Marissa to sign up to help out at the table and to distribute brochures.

Special Halloween Social Committee Chairman Jennifer Hall reported that the committee met on August 10 to discuss activities planned for the dance which will be held in the common area on October 31. There will be a costume contest with trophies for the best costumes. A band has been secured. Other activities will include bobbing for apples and a pumpkin decorating contest.

Unfinished Business

There was no unfinished business.

New Business

Tina Lemke moved, and it was seconded, that we decorate the student center to promote the Halloween social. The motion was adopted.

Jared Roche moved, and it was seconded, that we sponsor a bake sale. Marissa Kleckner moved, and it was seconded, to refer this to a committee of two to be appointed by the chair. The motion was adopted. Jennifer Hall and Jared Roche were appointed to the committee.

Announcements

Marissa Kleckner announced that local chapter adviser Dan Hazlett had been honored at the National Leadership Conference this summer as an outstanding local chapter adviser. She thanked Mr. Hazlett for all of his dedication to the chapter and presented him with a small plaque to show the chapter's appreciation.

Adjournment

There being no further business, the meeting was adjourned at 5:30 p.m.

Libby Johnson

Stanly Community College PBL Secretary

5. Restorative motions that bring a question again before the assembly

Main motion – is a motion whose introduction brings business before the assembly.

Subsidiary motions – assists the assembly in treating or disposing of a main motion. They have the following characteristics: 1) they are applied to another motion; 2) they can be applied to any main motion; and 3) they fit into an order of precedence.

Privileged motions – concern matters of immediate and overriding importance that without debate should be allowed to interrupt the consideration of anything else.

Incidental motions – relate in different ways to the pending business or the business otherwise at hand. They commonly arise out of 1) another pending motion; or 2) sometimes, another motion or item of business.

Motions that bring a question again – either by their introduction or by their adoption, serve the function of their name.

Making a Motion

1. **The member rises and addresses the presiding official** by the title “Mr. (*Madam*) President” or “Mr. (*Madam*) Chairman.”
2. **The presiding officer recognizes the member.** The chair may recognize a member by name, or by a nod to him. After receiving formal recognition from the chair, a member is then said to “*have the floor*” and is the only member who may present or discuss a motion.
3. **The member makes the motion.** Always introduce a motion in the form, “*I move that...*” followed by a statement of the motion.
4. **Another member seconds the motion.** Without recognition from the presiding official, another member may say, “*I second the motion.*” If the motion is not seconded, it “*dies for lack of a second.*”
5. **The presiding official states the motion to the assembly.** The chair repeats or “*states the motion*” to the assembly. Once it has been formally stated to the assembly, it may be referred to as “*the question.*”

6. **The members discuss or debate the motion.** After the motion has been stated by the chair, it is open for debate. Any speaker may be recognized by the chair. Several members may rise simultaneously, and then the chair should use the following guidelines when deciding which member should be recognized.

- Preference should always be given to the proposer of the motion.
- No member may speak more than twice on the same question each day.
- All remarks must be germane (pertinent) to the pending question.
- All remarks are addressed to and through the chair.
- A member may speak no longer than 10 minutes per speech without the consent of the assembly.
- Rights in regard to debate are not transferable.
- To participate in debate, the presiding official must relinquish the chair.

7. **Members vote on the motion.** When debate appears to have closed, the chair “*puts the question to a vote.*” First he may inquire, “*Is there any further discussion?*” or “*Are you ready for the question?*” If no one rises, the chair presumes that discussion is closed. The chair will then take the vote by saying, “*All in favor (state the motion) say ‘Aye.’*” Following the assembly’s response, he says “*Those opposed say ‘No.’*” If the vote can not be determined by the volume of voices, “*The chair is in doubt. Those in favor of the motion, please rise.*” After counting he says, “*Be seated. Those opposed please rise.*” After counting, “*Be seated.*” Or the vote may similarly be taken by a show of hands. The chair must always call for the negative vote, no matter how nearly unanimous the affirmative vote may appear to be.

8. **The presiding official announces the result of the vote.** The chair formally announces the outcome of the vote to the assembly. As may be appropriate the chair will say, “*The ayes have it and the motion is adopted*” (or “*carried.*”) Or “*The noes have it and the motion is lost.*” For a rising vote or a vote by show of hands: “*The affirmative has it and the motion is adopted*” or “*The negative has it and the motion is lost.*” After the vote has been announced by the chair, another motion may be considered.

Glossary of Basic Parliamentary Terms

Adjourn To close the meeting when no motion is pending and there is no further business.

Amend A motion to modify the wording – and within certain limits the meaning – of a pending motion before the pending motion itself is acted upon.

Appeal To determine the assembly’s attitude toward a ruling made by the chair.

Call for the Orders of the Day A privileged motion by which a member can require the assembly (1) to conform to its agenda, program, or order of business, or (2) to take up a general or special order that is due to come up at that time.

Chair Applies both to the person presiding and the station in the hall from which he or she presides.

Commit Generally used to send a pending question to a relatively small group of selected persons – a committee – so the question can be carefully investigated and put into better condition for the assembly to consider.

Debate Discussion of the merits of a motion.

Division of the Assembly When a member doubts the result of a voice vote or a vote by show of hands, the member can call for a Division of the Assembly, thereby requiring the vote to be taken again by rising.

Division of a Question To divide a motion so that the parts of it may be considered separately.

Lay on the Table To enable the assembly to lay the pending question aside temporarily when something else of *immediate urgency* has arisen.

Limit or Extend Debate To limit debate by reducing number of length of speeches or requiring that at a certain time debate shall be closed. To extend the limits of debate by allowing more and longer speeches.

Obtain the Floor To obtain the floor, the member rise and addresses the chair. When the chair calls on the member, he or she can now speak.

Parliamentary Inquiry A question directed to the presiding official to obtain information on parliamentary law or the rules of the organization bearing on the business at hand.

Point of Information A request directed at the chair, or through the chair to another officer or member, for information relevant to the business at hand but not related to parliamentary procedure.

Point of Order Calls attention to a violation of parliamentary procedure.

Postpone Definitely or to a Certain Time The motion by which action on a pending question can be put off, within limits, to a definite day, meeting, or hour, or until after a certain event.

Postpone Indefinitely A motion that the assembly decline to take a position on the main question. Its adoption kills the main motion and avoids a direct vote on the question.

Previous Question A motion to bring an immediate vote on one or more pending questions, thereby ending debate.

Raising a Question of Privilege Permits a request or main motion relating to the rights and privileges of the assembly or any of its members to be brought up for possible immediate consideration because of its urgency.

Recess A short intermission in the assembly’s proceedings which does not close the meeting, and after which business will immediately be resumed at exactly the point it was interrupted.

Reconsider To bring back for further consideration a motion that has already been voted on. The member moving to reconsider must have voted on the prevailing side of the question to be considered. The making of this motion is subject to time limits.

Rescind To cancel or countermand a previous action.

Suspend the Rules When an assembly wishes to do something it cannot do without violating one or more of its regular rules, it can adopt a motion to suspend the rules.

Take from the Table To make pending again a motion or series of adhering motions that previously had been laid on the table.

PROGRAM OF WORK

Successful businesses could not operate without careful planning. They must develop business plans that incorporate well-defined goals and objectives with the necessary action steps and costs; they must then follow effective operational plans to maintain success. The successful FBLA-PBL chapter imitates the successful business by taking the time and effort to develop a written plan of action. This plan becomes the chapter’s Program of Work. For sample program of work form template, please see the chapter/member recognition section of the *Chapter Management Handbook*, pages VI-22–VI-23.

The program of work consists of all the activities planned by the chapter’s standing committees (the number of committees is decided by the local chapter.) Since “members support what they (help) create”, each chapter member should serve on at least one standing committee and assist in the program of work development.

Suggested Committees

Committees are essential to the success of a local chapter. The Committee Chairman should complete a project activity report for every project upon its completion. A report form can be found at the end of this section.

Professional Development – plans worthwhile meetings for membership in accordance with FBLA-PBL goals.

Community Service – develops activities for the community’s betterment.

Social – Plans fun activities to balance out a meeting.

Fundraising – develops projects to raise the necessary funds to carry out an activity in the program of work.

Public Relations – stimulates and sustains public support of the FBLA-PBL organization.

Planning Process

Establishing an effective program of work requires planning. Planning activities and the achievement of goals requires thoughtful consideration, time, and an orderly process. The following steps are one approach that chapters can apply to their process.

1. **Project/Activity Purpose.** What is the intended goal or outcome of the project or activity? What do you want to achieve? For instance, if you want to do a fundraiser, why are you doing that fundraiser? The answer is **not** to “raise funds.” The answer is to “raise *X amount of funds for such-and-such an activity.*” Similarly, if you want to do something for FBLA-PBL Week, your goal is to build greater recognition for FBLA-PBL in your school, community, etc.

Make your goals specific. Quantify them where appropriate (e.g. *recruit ten Professional members by November.*)

2. **Project Definition.** Once you have a goal, you need a project – a **strategy** – that will accomplish it. Sit down with your group and brainstorm. Share, define, and refine your ideas. Think of ways you can meet your goal, no matter how unlikely the ideas initially appear. During this brainstorming session, do not try to discuss the workability of the individual ideas; just get them all down. Later, you’ll pick which one(s) will work.

Often, when you begin by defining your goal, you end up with a somewhat different project than you initially intended. This is good: it means that your original strategy would not have met your objective.

3. **Resource Identification.** What resources do you have available, or could you make available, to help you do your project? These resources include people, money, time, supplies, materials, facilities, etc. Think through your project carefully and make a list of all the things you have – and all the things you will need. Ask yourself questions like
 - How much money will it take?
 - Who can help – inside and outside the chapter?
 - Are any experts needed/available?
 - Do you need any special facilities or supplies?
 - Can any of your supply, material, or facility needs be donated, or must they be purchased?
4. **Task Assignment.** Any project looks “big and scary” until it has been broken into its smaller, manageable component tasks. Use these questions to separate the tasks in your project:
 - What jobs need to be done to meet the goal?
 - In what order do things need to happen?
 - What are the interim and final deadlines for goal achievement?

Write down the tasks that need to be finished. Divide the larger ones into several smaller pieces. Next, assign committees or individuals to each task. Don’t leave any unassigned, thinking you’ll get to them later. There is no “later” in planning.

5. **Deadlines.** Give each task a date for completion. You can – and probably will – modify these dates later; but get them down for now, so people will have something to work toward.
6. **Follow-up.** Check with each individual or committee regularly to determine their status and progress. Identify potential problems early and they will be easier to address and overcome. Don’t wait for the due date to find out that something isn’t going to get done. Stay in touch.
7. **Evaluation.** Evaluation, like planning itself, is a tool to use in improving your performance and your projects. It should be tied directly to your goals.

Make sure your evaluation is detailed enough to capture all aspects of your project. For instance, if your goal was quantifiable, simply determining that the end number was greater than your goal does not suffice. Evaluation of the project should also address the processes and intermediate steps as well.

Chapter Activities

Activities should reinforce the FBLA-PBL goals listed in the National Organization section of this handbook. They should also be tailored to each local chapter. These activities are meant to facilitate intelligent career choices, enhance business skills, teach the value of community responsibility, and develop individuals.

Chapter activities fall into five functional areas: professional development, community, service, social, fundraising, and public relations. Chapters should strive for an appropriate balance between these categories in their activities.

■ Professional Development

These activities increase knowledge of various business and office occupations, providing valuable career orientation and goal-setting opportunities. Guest speakers, panel discussions and business-related films can be used as instructional programs at chapter meetings. PBL trips and business tours demonstrate first-hand what has been discussed at a meeting or in business classes.

The free enterprise system makes an excellent discussion topic. Since members will eventually obtain jobs within this system, it is important to understand its principles. Collect informative material on the subject; invite business speakers to address the topic of free enterprise and how it affects their business; conduct debates, forums, fairs, and surveys. Many chapters develop special events to observe American Enterprise Day.

Other possible professional development activities include job shadowing programs, mock interview experiences, special recognition programs, and the competitive events program.

■ Community Service

Community service activities help the chapter get involved and contribute directly to the community's benefit. Members recognize the importance of being responsible citizens and form networks with business and community leaders. They also gain the experience of managing a project outside the school environment. Many chapters sponsor activities to benefit social and health organizations like the March of Dimes and United Way.

Civic activities provide a public relations vehicle for the chapter by informing the community about business, education, and FBLA-PBL. Chapters often enter floats in parades, sponsor booths and exhibits, or write articles that tell the FBLA-PBL story.

Chapter members need not leave the school grounds to engage in civic activities. They can help in school-wide activities such as clean-up drives and

citizenship campaigns. They may take on projects such as publishing a school directory, managing a concession stand at sports or social events or preparing the printed program for such special events.

■ Social

Members work hard and need time for recreational, fun events. Social events can be used to acquaint prospective members with the chapter or as a reward for an especially challenging or successful project. Chapter morale and camaraderie is enhanced through social activities.

■ Fundraising

Fundraising is important in any FBLA-PBL chapter. Revenues above and beyond dues income are needed to support the local chapter's needs. The educational value of conducting a fundraising event is an important incentive and benefit.

■ Public Relations

Public relations activities are crucial to getting the word out about your chapter. Other potential members will not know about your activities and the opportunities of FBLA-PBL unless you spread the word through posters, flyers, bulletin boards, etc.

To determine the value or feasibility of suggested activities, consider the following:

- Which FBLA-PBL goal(s) does this activity reinforce?
- Will it be a business learning experience? How?
- What are the risks and costs involved? Are they worth the benefits?
- Can the majority of members participate?
- Has it been well thought out and carefully planned?
- Has it been tried in the past? What were the results?
- How will the activity be funded? Will it make money?
- Will it provide for business community involvement?
- Who outside the organization might be of assistance?
- Have the school administration and business advisory council been informed?
- How will the activity be publicized, both before and after?

Chapters should also complete the Project Activity Report Form, page I-24.

Structured ceremonies heighten awareness of the importance and impact of an occasion. Pages I-17–I-20 contain suggested formats for chapter installation, officer installation, and new member induction ceremonies.

These formats should be modified to fit the makeup and desires of the individual local chapter. Phi Beta Lambda chapters should disregard all "America" segments of the scripts.

FBLA-PBL EMBLEM CEREMONY



FBLA Crest



PBL Crest

This ceremony works well for an open house or even the first meeting of the FBLA-PBL year. It may also be used with either the officer installation, new chapter installation, or new member induction ceremony. FBLA chapters should use the FBLA shield above and PBL should use the PBL shield. Many chapters make a large emblem on construction or tag board and then cut out the different pieces. Leave the top of the eagle on the background as the base or starting piece. As an officer speaks about each part, they place the “puzzle” of the emblem on a large piece of tagboard or felt (with Velcro if you are using felt.) You can also use the same concept with a PowerPoint® presentation. Once the ceremony is done – you will have a completed emblem/shield.

President: Welcome to the Emblem Ceremony for FBLA-PBL. Our emblem or shield illustrates the importance of our mission, “To bring business and education together in a positive working relationship through innovative leadership and career development programs.”

Service: the word service donates the idea that every individual should be interested in and take responsibility for promoting better social, political, and family life. (President takes service cut-out and places it on the emblem in the proper location or if you have an electronic presentation, service is displayed on the emblem.)

Vice President: Education: the word education is symbolic of the idea that education is the right of every individual. (Vice President places the education cut-out on the emblem or if you are using PowerPoint® education is displayed on the emblem.)

Secretary: Progress: the word progress represents the challenge of tomorrow which depends on mutual understanding and cooperation of business, industry, labor, religious, family, and educational institutions and by people of our own and other lands. (Secretary places progress cut-out on the emblem or in PowerPoint®, progress is displayed.)

Treasurer (or other officer): Future: the word future reminds us that the future of the world depends upon the quality of leadership that we are able to produce and with FBLA-PBL we will be the business leaders of the future. We must learn to recognize the situation in which our individual talents will

be useful. (Future cut-out is placed on emblem or displayed.)

Reporter (or other officer): Business: the world of business is our world. To be successful in business, a person must be educated both formally and informally in business methods and procedures and in the basic principles of our economic system and government. (Business cut-out is placed on emblem or displayed.)

Historian (or other officer): Leaders: The word leaders represents the search for knowledge in order for us to become better citizens. This knowledge will prepare us for the great task of leadership ahead. (Leaders cut-out is placed on emblem or displayed.)

Parliamentarian (or other officer): America (*Please note: Phi Beta Lambda should skip this part of the ceremony*) Finally, we think about America. The future of America depends on our generation. We should pledge ourselves to use the abilities that we have to make America a better place for everyone.

President: All the words together stand for Future Business Leaders of America (PBL should use Phi Beta Lambda.) The shield stands for our organization which provides opportunities for each member to become a leader of tomorrow.

Chapter Installation

Whenever possible, the installation ceremony should take place before a large group such as a school assembly, assembly of business students or a special meeting to which parents and business people are invited. Members of the installation team should be seated on a stage or a raised platform.

Materials Needed:

- Tall Candle
- Candles: white, gray, green, violet, blue, yellow, orange, red
- Official Charter
- Names of Charter Members

Installing Official: (Standing) FBLA (PBL, or FBLA – Middle Level) is a national organization for business students who are preparing for careers in business or business education. I have been authorized to conduct the installation of (*school name*), into the national chapter of **Future Business Leaders of America-Phi Beta Lambda, Inc.**

FBLA-PBL is designed to promote Future Business Leaders. It is fitting, as we begin this new chapter, that we consider what these words represent to our organization.

Future: Our daily educational experiences and our involvement in leadership activities prepare us for the future – a time to accept challenges.

In **FBLA-PBL**, we will find the tools to prepare for the future. We will profit from the experiences of others, those who have preceded us, as well as our teachers and others with whom we associate. Our studies and activities will help us meet changing conditions and further our understanding of the world's varied economic systems.

Business: We realize the importance of education and training in business methods and procedures. We appreciate the roles of business and education in our daily lives.

Leaders: The future of our country depends on the quality of leadership. Leadership implies honor, foresight, tact, competence, dependability, discretion and integrity. A leader must listen, withstand criticism and be flexible. A leader accepts failure in stride but is willing to profit from it. As members of **FBLA-PBL**, it is our duty to prepare for the enormous responsibility of business leadership in the years ahead.

America: If America is to remain a world leader, intelligent young men and women are needed to guide our country by studying America's past and analyzing her present. The initiative and success of leaders in business will help shape the future of America. Through **FBLA-PBL**, we will strive for leadership in the field of business, thereby helping to strengthen America. (*Note: PBL chapters will most likely want to disregard this section.*)

(Suggestion: At this point in the ceremony, it may be helpful to provide a brief history of **FBLA-PBL**. See the History segment of the National Organization section for background information of **FBLA-PBL**, page VIII-17. Call your state **FBLA-PBL** leaders for state membership information.)

Our organization has a definite and worthwhile list of goals. I should like to ask (**name of assistant installing officer or member of installation team**) to read these goals. (See listing of **FBLA-PBL** Goals in the National Organization section of the *Chapter Management Handbook*.)

Installing Official: Will the new officers of the (**school**) Chapter of (**FBLA PBL, or FBLA – Middle Level**) please rise and remain standing as I announce each office name. (Installing officer calls name and title of each officer.)

You have been chosen from among the members at (**name of school**) as officers for the coming year. You have been selected because your members have faith in your ability and confidence that you will ful-

fill the duties of your office. I challenge you to accept the responsibility that has been given to you. Please raise your right hand and repeat after me.

I, as an officer of the (school) Chapter of (FBLA, PBL, or FBLA – Middle Level) do solemnly promise that I will fulfill the responsibilities of my office to the best of my ability, and that I shall carry them out in accordance with the bylaws of FBLA-PBL, Inc.

(While lighting the tall candle) By lighting this candle, I seal the vow you have taken and vest in you the authority of your office.

(Speaking to all members) You have heard the vows that these officers of your chapter have taken. In your presence, I now declare them officially installed as officers of the (**school**) Chapter of **FBLA-PBL** for the year 20__.

(Speaking to officers and members, and particularly to chapter president) By authority of **FBLA-PBL, Inc.**, I am pleased to present you with the official charter of your chapter. (Reads the charter) By virtue of this charter, this chapter now becomes a part of the national organization. You now have the privilege and the responsibility of operating under the name (**Future Business Leaders of America Phi Beta Lambda, or FBLA – Middle Level**) and as a part of the state chapter and the national organization. The responsibility of making the (**school**) Chapter a success rests with its members and officers.

Installing Official: The **FBLA-PBL** Chapter president, (**name of president**), will give the oath of membership to the charter members of the chapter. (Chapter officers turn and face audience.)

Chapter President: The secretary will now read the names of the Charter members of (**school**) Chapter of **FBLA-PBL**. As the names are read, the members will please rise and remain standing until all members have been presented.

Chapter Secretary: (Reads slowly the name of each charter member. Charter members stand as their names are called and remain standing until the oath has been administered.)

Chapter President: Each of you, please raise your right hand and repeat the oath of membership in unison after me.

I do solemnly promise to uphold the aims and responsibilities of **FBLA-PBL** and, as an active charter member, I shall strive to develop the qualities necessary to become a leader in business and in the community in which I live.

As president of the (**school**) Chapter of **FBLA-PBL**, I declare you duly inducted as charter members.

Installing Official: (Name of assistant installing official or member of installation team) will lead members in reciting in unison the FBLA-PBL Creed. (The Creed is recited – see below.)

The FBLA-PBL Creed

I believe education is the right of every person.

I believe the future depends on mutual understanding and cooperation among business, industry, labor, religious, family and education and institutions, as well as people around the world. I agree to do my utmost to bring about understanding and cooperation among all of these groups.

I believe every person should prepare for a useful occupation and carry on that occupation in a manner that brings the greatest good to the greatest number.

I believe every person should actively work toward improving social, political, community and family life.

I believe every person has the right to earn a living at a useful occupation.

I believe every person should take responsibility for carrying out assigned tasks in a manner that brings credit to self associates, school and community.

I believe I have the responsibility to work efficiently and to think clearly. I promise to use my abilities to make the world a better place for everyone.

Officer Installation

Installing Official: Will the newly elected officers of the (school) Chapter of (FBLA, PBL or FBLA – Middle Level) please come forward as I announce your office. (Installing official lights white candle.) Lighting the tallest candle symbolizes the chapter in its entirety with all its members working together. With this symbol we shall charge each officer to do the job for which he/she has been elected.

(name of parliamentarian), parliamentarian. (Parliamentarian comes forward.) You have been named parliamentarian of the (school) Chapter of FBLA-PBL. As parliamentarian, it will be your responsibility to monitor all formal chapter meetings so that they are conducted within the framework of parliamentary procedure. Through your efforts, the chapter meetings will be conducted in an orderly fashion, resulting in the efficient disposition of business. Do you accept this responsibility?

Parliamentarian: I do.

Installing Official: I now declare you in the name of FBLA-PBL, the parliamentarian (gray candle is lit by white candle.) This gray candle symbolizes the

achievements possible when chapter meetings are conducted in an orderly fashion.

(name of historian), historian. (Historian comes forward.) You have been elected historian of the (school) Chapter of FBLA-PBL. As historian, it will be your responsibility to maintain records of the chapter, including a report of activities, awards and publicity. Through your efforts, people see the progress and activities of your chapter. Do you accept this responsibility?

Historian: I do.

Installing Official: I now declare you in the name of FBLA-PBL, the historian (green candle is lit by white candle.) This green candle symbolizes the satisfaction that can be derived from preserving the past and recording the present, while preparing for the future.

(name of reporter), reporter. (Reporter comes forward.) You have been elected reporter of the (school) Chapter of FBLA-PBL. As reporter, your job will be to report meetings and other newsworthy activities of the chapter through the proper channels. Do you accept this responsibility?

Reporter: I do.

Installing Official: I now declare you in the name of FBLA-PBL, the reporter. (Reporter selects violet candle from table, and installing official lights it with white candle.) This violet candle symbolizes the inspiration and enlightenment that can be brought by reporting the activities of the FBLA-PBL Chapter of (school.)

(name of treasurer), treasurer. (Treasurer comes forward.) You have been elected treasurer of the (school) Chapter of FBLA-PBL. In electing you to this office, the members have shown their faith in your business ability and your honesty. Do you promise to keep accurate records of all money received and spent and to present orderly reports upon proper requests?

Treasurer: I do.

Installing Official: I now declare you in the name of FBLA-PBL, the treasurer. (Treasurer selects blue candle from the table and installing official lights it with white candle.) This lighted blue candle symbolizes the trust and confidence which the members have in your ability to safeguard all funds.

(name of secretary), secretary. (Secretary comes forward.) You have been elected secretary of the (school) Chapter of FBLA-PBL. Accepting this office obligates you to be present and keep a record of what takes place at every meeting. Do you accept this responsibility?

Secretary: I do.

Installing Official: I now declare you in the name of **FBLA-PBL**, the secretary. (Secretary selects yellow candle from table, and installing official lights it with white candle.) This yellow candle symbolizes constancy in attendance and in keeping members informed of the chapter's progress.

(**name of vice president**), vice president. (Vice president comes forward.) You have been elected vice president of the (**school**) Chapter of **FBLA-PBL**. Your duty will be to assume the responsibilities in the absence of the president. Will you strive to carry out the duties of this office?

Vice President: I do.

Installing Official: I now declare you in the name of **FBLA-PBL**, the vice president. (Vice president selects orange candle from table and installing official lights it with the white candle.) This orange candle is the symbol of the harmony and faithfulness which should characterize your efforts in working with the president to carry out the ideals of the chapter.

(**name of president**), president. (President comes forward.) The members of the (**school**) Chapter of **FBLA-PBL** have bestowed upon you a great honor in electing you the president. Your major responsibilities are to lead and encourage this chapter in all its activities. It is your duty to preside at all meetings and see that they are conducted in accordance with the constitution and correct principles of parliamentary practice. Do you accept this responsibility?

President: I do.

Installing Official: I now declare you in the name of **FBLA-PBL**, the president. (President takes red candle from the table and installing official lights it with the white candle.) This red candle is the symbol of your duties and obligations to the chapter and its members.

(Addressing members of the chapter.) In your presence, I now declare them officially installed as officers of the (**school**) Chapter of (**FBLA, PBL or FBLA – Middle Level**) for the coming year. (Lights are turned out.) You may be seated.

(The newly elected president is called forward, and with a few appropriate remarks, the installing official presents the gavel to the new president who closes the meeting.)

New Member Induction

Guide: Mr. (or Ms.) President, these candidates have expressed a desire and meet the requirements to become members of the (**name**) chapter of (**FBLA, PBL or FBLA – Middle Level**).

President: (to the candidates) We accept you as candidates for membership in the (**name**) chapter of (**FBLA PBL or FBLA – Middle Level**.) Before you become members, however, let us consider the meaning of the words in the name of our organization.

Future: Our daily educational experiences and our involvement in leadership activities prepare us for the future – a time to accept challenges.

In **FBLA-PBL**, we will find the tools to prepare for the future. We will profit from the experiences of others, those who have preceded us, as well as our teachers and others with whom we associate. Our studies and activities will help us meet changing conditions and further our understanding of the world's varied economic systems.

Business: We realize the importance of education and training in business methods and procedures. We appreciate the roles of business and education in our daily lives.

Leaders: The future of our country depends on the quality of leadership. Leadership implies honor, foresight, tact, competence, dependability, discretion and integrity. A leader must listen, withstand criticism and be flexible. A leader accepts failure in stride but is willing to profit from it. As members of **FBLA-PBL**, it is our duty to prepare for the enormous responsibility of business leadership in the years ahead.

America: If America is to remain a world leader, intelligent young men and women are needed to guide our country by studying America's past and analyzing her present. The initiative and success of leaders in business will help shape the future of America. Through **FBLA-PBL**, we will strive for leadership in the field of business, thereby helping to strengthen America. (*Note: PBL chapters will most likely want to disregard this section.*)

President: You have just heard the meaning of the letters used in our title. We are a national organization for business students who are preparing for careers in business and business education.

FBLA-PBL is based on a definite set of goals, including development of competent, aggressive business leadership; creation of more interest and understanding of American business enterprise; and participation in worthy undertakings for the improvement of business and citizenship.

As you accept and strive to achieve these goals you will gain the greatest benefit possible from your membership in this chapter. Welcome to the (**name**) chapter of **FBLA-PBL, Inc.** You are now officially accepted as members in good standing, entitled to your full rights and responsibilities.



PBL Officer Application

If you are interested in becoming a PBL officer, please fill out the application below and turn it in to your PBL adviser by May 1. Requirements for being an officer are the following: you must be a current PBL member and taking a business course next semester, joining PBL again in the Fall. You also need the enthusiasm and motivation necessary to fulfill the responsibilities of that position. If you decide to run for office, you are making a commitment. This means attending leadership conferences, plus PBL local activities and fundraiser participation. All officers are expected to assist the chapter in completing reports and forms due to the state and national office. Be responsible for seeing that the chapter receives state and national recognition.

Please complete using black ink.

Name: _____ Class: _____

Address: _____

Number of Years in FBLA-PBL: _____ E-mail: _____

Position desired: (Check one)

- | | |
|---|--|
| <input type="checkbox"/> President | <input type="checkbox"/> Reporter |
| <input type="checkbox"/> Vice President | <input type="checkbox"/> Historian |
| <input type="checkbox"/> Secretary | <input type="checkbox"/> Parliamentarian |
| <input type="checkbox"/> Treasurer | |

Present Schedule:

Time	Course	Teacher	Room
8-9 am			
9-10 am			
10-11 am			
11 am-12			
12-1 pm			
1-2 pm			
2-3 pm			
3-4 pm			

Business Courses Taken (including this year):

Why do you want to become an officer for FBLA-PBL? (you may include this on a separate sheet of paper if desired):



August 2007

Dear _____:

Thank you for becoming a Professional Division member of the _____ Chapter of Phi Beta Lambda.

Your role in our organization is vital to our student members who look to you as role models for the future careers that they hope to have. You are their link to the real world and an invaluable resource to your local chapter(s).

Our members look forward to receiving valuable information about business from you. With your help, our members will continue to develop both their business and their leadership skills. In addition, we would like to invite you to participate in one or more activities to enable us to succeed in achieving our goals for the year.


- Volunteer to become part of the _____ chapter Business Advisory Council. This would include attending at least two strategic sessions in the coming year and agreeing to help a member prepare for regional/district and/or state competition.
- Provide a job shadowing opportunity or a business tour for a group of chapter members.
- Work with a student team to create a Business Plan or Partnership with Business Project.
- Volunteer to be a guest speaker for a business class or a local chapter meeting.

Enclosed you will find my business card with contact information. Thank you for helping to make our organization successful! Your support of our chapter is greatly appreciated.

Sincerely,

John H. Smith, PBL Chapter President

Enclosure



Local Chapter Monthly Report Form

FBLA·ΦΒΛ

The Secretary should complete the report below with a brief description of the activities in each area and submit to:

FBLA-PBL Adviser _____

FBLA-PBL President _____

FBLA-PBL Vice President _____

FBLA-PBL Reporter _____

FBLA-PBL Secretary Notebook _____

Chapter Name:

Report for the Month of:

Recruitment and Public Relations Activities:

Leadership Activities:

Community and School Service Activities:

State and National Projects and Conferences:

Monthly Chapter Success Story:

Other:



Project Activity Report Form

FBLA·ΦΒΛ

Committee: _____ **Date:** _____

Check appropriate report (only one)

- | | |
|--|---|
| <input type="checkbox"/> Business Knowledge and Skills | <input type="checkbox"/> Public Relations |
| <input type="checkbox"/> Community Service | <input type="checkbox"/> Fundraising |
| <input type="checkbox"/> Leadership/Professional Development | <input type="checkbox"/> Social |

Description of the Activity:

Purpose of the Activity:

Steps to Complete Project:

Target Dates _____ Cost: _____

Briefly describe steps below:

How many FBLA-PBL members participated? _____

What was accomplished and what effect did it have?

Audience reached: _____

Publicity received: (Attach to report.) Project successful? Yes No

Suggested improvements: _____

LOCAL CHAPTER ORGANIZATION LESSON PLAN

Lesson Objectives

■ Communications

- Communicate in a clear and correct manner when participating in a group discussion or problem resolution.
- Participate in group discussions for problem resolution.
- Identify and overcome major barriers to listening.
- Participate as a productive member of a group.

■ Lifelong Learning

- Demonstrate appropriate interpersonal skills when working with others in small groups, in business, and in local chapter activities.

■ Critical Thinking Skills

- Demonstrate critical, creative, and analytical thinking to solve both individual and group problems.

Introductory icebreaker to lesson plan:

(Time: 5-10 minutes)

Pass around a bowl of M&M's. Have each student take some M&M's. For each M&M that a student has, he or she has to tell something about him or herself.

Notes:

- Strong Communications in a local chapter between the adviser, officers, and members = Success
- It is easy to get the wrong message across if you are not careful. Make sure that you have directions, whether your communications are oral or written.
- A good example happened when General Motors introduced the Chevy Nova in South America. Company executives were unaware that in Spanish, “no va” means that it won't go. The company later renamed the car to appeal to the Spanish Markets.
- What does this show about communications?

Reinforcement activity: (Time: 10-15 minutes)

Put the following items on the front table: peanut butter jar, jar of jelly, loaf of bread, knife, spoon, and napkins. Ask students to write directions on “How to Make a Peanut Butter and Jelly Sandwich.” Allow a short time

for writing directions. Have a volunteer read his or her directions one sentence at a time as another student volunteer follows the directions exactly as they are written. (Example: “Put peanut butter on bread.” Student volunteer places the peanut butter jar on top of the loaf of bread.) This exercise reinforces the importance of speaking with clarity and listening with understanding.

Notes:

- When you are speaking, writing, or in conversation with another person you need to focus on the person or audience that you are speaking to.
- On the average Americans talk 100-125 words per minute and think about 400 words per minute. We fill in the gap with our own thinking and listening. We tune into a speaker for 10 seconds and then exit for a mental holiday.

Reinforcement Activity: (Time: 5-7 minutes)

The “I's “Have it. Have students find a partner. For five minutes, tell them that they can talk about anything in the world that they want to discuss. There is just one rule: The student can not use the word “I”. The objective of this exercise is to illustrate how we tend to be more self-centered than we may have thought, and to demonstrate the importance of focusing on the other person.

Discussion questions:

- How many of you were able to talk for those five minutes without using the pronoun “I”?
- Why do so many of us have difficulty avoiding the over use of “I” in conversation?
- How do you feel when talking to or listening to someone who starts every sentence with the word “I”?
- How can we phrase our communications to better focus on the other person?
- If you did not use the word “I”, what strategies did you use to avoid it?

Notes:

- Strong communication skills are crucial when working in groups and committees in a local chapter.
- Today's businesses are looking for employees who can work as part of a team.
- It is important to not only communicate in a correct manner when participating in a group discussion, but also use creative thinking to solve a problem.

Reinforcement activity: (Time:15-20 minutes)

Selling a Zmoot. Divide students into groups. Each group is asked to sell a strange object to the rest of the class – a “Zmoot”. The sky is the limit on objects. The “Zmoot” can be almost anything, as long as it is unusual. You will need different objects or photos (often a garage, basement, or storage area is a great place to look for unusual items) for each group. Give each group about 15 minutes to develop a “skit” to sell their item. Each group will present out. If you are using a photo or drawing, you may want to use an overhead projector. (See the grading sheet on the next page.)

Conclusion:

Discussion Points:

- Why is strong communications important in a local chapter?
- How does it contribute to the success of a chapter or a business? Give a business example or a chapter example.



FBLA-PBL Live Commercial Grading Sheet

For this project, students are to create a “LIVE” commercial selling a Zmoot.

The group commercial will be graded using the following criteria:

Objective/Competency	Points Possible	Points Awarded
Commercial shows creativity and originality.	15	
Commercial is 1-2 minutes in length.	10	
All group members are involved and have parts for the “LIVE” presentation.	15	
Commercial appeals to the audience.	10	
Commercial does a good job of explaining what a Zmoot is.	10	
Commercial does a good job of selling the product.	15	
Commercial and product must be appropriate for classroom	10	
Commercial progresses logically and is well thought out.	15	
Total Points	100	

Comments:

Student Group Members: _____

Date: _____

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