

Steps To Charter A Chapter



WELCOME to Future Business Leaders of America – Phi Beta Lambda, Inc. We hope you find this Chapter Start Up Packet both informative and easy to use. The pull-out reference sheets on the left side contain information on FBLA-PBL, who we are and what we offer, while the right side provides step-by-step “how to” information on organizing a chapter. When you complete these steps, forward the following items to your state chairman.

- ❖ Completed application for chartering
- ❖ Local bylaws
- ❖ List of members
- ❖ Check for national dues and activation fee
- ❖ Check for state dues

After approval by your state chairman, the above items are then sent to the national office where a special identification number is assigned to the chapter. The chapter is then placed on the national mailing list and sent a New Chapter Starter Packet. The Starter Packet contains an FBLA-PBL Handbook, National Awards Program Guide, membership cards, additional member reporting form and samples of current publications.

If an FBLA or PBL chapter had previously chartered at your school, but has been inactive for one year or more, the chapter is eligible for reactivation and should follow steps described in this Chapter Start Up Packet. It is at the discretion of the reactivating chapter as to whether it wishes to complete a new set of bylaws.

Steps to Chartering a Chapter:

1. Review this Start Up Packet
2. Identify an advisor and submit a proposal to your school administrator for establishing a PBL chapter
3. Coordinate a membership drive (See Membership Recruitment Sheet)
4. Hold an orientation meeting (See Chapter Meeting Sheet)
5. Elect officers (See Chapter Meeting and Officer Roles)
6. Vote on Local Bylaws (See Application and Bylaws Sheet)
7. Collect Dues (See Application and Bylaws Sheet)
8. Submit a completed chartering application to the state chairman
9. Conduct a New Officer Installation Ceremony (See Installation Ceremony Sheet)



THE ASSOCIATION

Future Business Leaders of America-Phi Beta

Lambda is a nonprofit 501 (c) (3) education association of students preparing for careers in business and business-related fields. The Association has four divisions:

- FBLA for high school students
- FBLA Middle Level for junior high, middle and intermediate school students
- PBL for postsecondary students
- And the Professional Alumni Division for business people, educators, and parents, who support the goals of the Association.

MISSION

The FBLA-PBL Mission is to bring business and education together in a positive working relationship through innovative leadership and career development programs.

GOALS

- Develop competent, aggressive business leadership
- Strengthen the confidence of students in themselves and their work
- Create more interest in and understanding of American business enterprise
- Encourage members in the development of individual projects which contribute to the improvement of home, business, and community
- Develop character, prepare for useful citizenship, and foster patriotism
- Encourage and practice efficient money management
- Encourage scholarship and promote school loyalty
- Assist students in the establishment of occupational goals
- Facilitate the transition from school to work

MEMBERSHIP

For the past few years, FBLA-PBL has enjoyed an annual increase in membership. The high school level has more than 215,000 members, while Phi Beta Lambda (postsecondary level) reaches over 10,000 college students.

STRUCTURE

FBLA-PBL is headquartered in Reston, Virginia, and organized on local, state and national levels. Business teachers/advisors and advisory councils guide local chapters. State chapters of Phi Beta Lambda have been organized and are functioning in most of the 50 states and U.S. territories. The state chapter consists of the local PBL chapters within that state.

The State Association is under the direction of the State Committee.



CONFERENCES/SEMINARS

National Fall Leadership Conference: Each fall, new leaders and advisors from chapters across the nation gather for regional conferences designed to guide and motivate their success for the year. This includes workshops, seminars, and a plenary session, as well as the benefit of networking among their peers from other cities.

State Leadership Conference: The State Leadership Conference wraps up the year by holding state officer elections and offering members workshops on various business issues and topics. During the three day conference, the members get a chance to test in over 50 competitions, attend the workshops, general sessions, listen to guest speakers, and participate in electing the next year's state officers.

National Leadership Conference: Each year, the best and brightest of FBLA and PBL convene to compete in leadership events, share their successes and learn new ideas about shaping their career future. These four day sessions are considered the pinnacle of the FBLA-PBL experience, especially for those running for national office.

PBL Dress Code



The PBL dress code is applied to all PBL events. The dress code allows the members to present themselves in a professional manner.

Males

- Business suit with collar dress shirt and necktie or Sport coat, dress slacks, collared shirt, and necktie.
- Dress slacks, collared shirt, and necktie.
- Banded collar shirt may be worn only if Sport coat or business suit is worn.
- Dress shoes and socks.

Females

- Business suit with blouse.
- Business pantsuit with blouse.
- Skirt or dress slacks with blouse or sweater.
- Business dress.
- Dress shoes and nylons.

Inappropriate attire, for both men and women includes:

- Jewelry in visible body piercing, other than ears.
- Denim or chambray fabric clothing of any kind, overalls, shorts, skirts, stretch, or stirrup pants, exercise or bike shorts
- Backless, see-through, tight-fitting, spaghetti straps, strapless, **extremely short**, or low-cut blouses/tops/dresses/skirts.
- T-shirts, spandex, midriff tops, tank tops, bathing suits.
- Sandals, athletic shoes, industrial work shoes, hiking boots, bare feet, or over-the-knee boots
- Athletic wear, including sneakers.
- Hats or flannel fabric clothing.
- Bolo ties.
- Visible foundation garments.

CLARIFICATION-Many women's two-piece suits currently are designed so that they do not require a blouse. Therefore, this will be accepted. In addition, sling-back shoes, open toe shoes, and sleeveless dresses are accepted.

DRESS CODE – FBLA-PBL members and advisors should develop an awareness of the image one's appearance projects. The purpose of the dress code is to uphold the professional image of the association and its members, and to prepare students for the business world. Appropriate attire is required for all attendees – advisors, members, and guests – at all general sessions, competitive events, regional meetings, workshops, and other activities unless otherwise stated in the conference program. Conference name badges are part of this dress code and must be worn for all conference functions. For safety reasons, do not wear name badges when touring. Professional attire acceptable for official FBLA-PBL activities will be required at all times.



Through FBLA-PBL's headquarters office, members can receive a wide variety of useful, innovative and educational materials, services and supplies. These publications and resources are designed to:

Motivate	Stimulate
Educate	Entertain
Recruit	Inspire
Communicate	Reward

PUBLICATIONS

PBL Business Leader

The primary PBL member publication, it provides PBL members and advisors with insightful articles on careers and business trends geared toward the post-secondary membership, updated information on national programs, and news of local chapter activities.

The Professional Edge

This newsletter was developed for professional members. It provides information on member and state activities, business trends, and updates on the Professional Executive Board's program of work.

RESOURCES

Through FBLA-PBL's website and the Pennsylvania State website, there are resources available for prospective members, current members and advisors. These websites can be used to:

- Get advice and assistance on starting and organizing a chapter.
- Exchange ideas about the successful operation of local and state chapters.
- Receive materials to learn more about the business world.
- Get information on the State and National Conference and seminars.
- Receive materials useful to local chapters.

In addition, feel free to contact any members of the State Executive Council by e-mail or phone.

Websites:

FBLA-PBL website	www.fbla-pbl.org
Pennsylvania PBL	www.papbl.org

E-mails:

President of PA PBL	President@papbl.org
Vice President of PA PBL	---
Secretary of PA PBL	Secretary@papbl.org
Treasurer of PA PBL	Treasurer@papbl.org
Reporter of PA PBL	---
State Chair of PA PBL	state_chair@papbl.org

Officers Roles



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

PRESIDENT

- ❖ Presides over and conducts the meeting.
- ❖ Keeps members and discussion on track.
- ❖ Appoints committees and serves as an ex-officio member to each.
- ❖ Coordinates chapter activities.
- ❖ Calls special meetings as needed.

VICE PRESIDENT

- ❖ Assists the president in the discharge of duties.
- ❖ Presides at meetings if the president is absent.
- ❖ Is prepared to assume the duties and responsibility of the president if the need should arise.
- ❖ Oversees all committee work and management of assignments.
- ❖ Serves as an ex-officio member of chapter committees.

SECRETARY

- ❖ Prepares the minutes of the meetings.
- ❖ Provides the president with an agenda for each meeting.
- ❖ Counts and records votes when taken.
- ❖ Prepares chapter reports.

TREASURER

- ❖ Receives and acts as custodian of chapter funds.
- ❖ Collects local, state, and national dues.
- ❖ Keeps financial records neat and current.
- ❖ Handles the chapter's accounts receivables and accounts payable.

REPORTER and/or PUBLIC RELATIONS OFFICER

- ❖ Develops media lists for chapter mailing.
- ❖ Gathers and classifies chapter news.
- ❖ Prepares news releases and articles for publication in school or local newspapers.
- ❖ Assists with planning and arranging chapter exhibits.

HISTORIAN

- ❖ Maintains a history of the chapter, including an annual report of chapter activities, awards, and publicity.
- ❖ Files clippings and pictures of the chapter's activities.
- ❖ Keeps a chapter publicity and activity scrapbook.

PARLIMENTARIAN

- ❖ Assists chapter members in understanding the basic purpose of parliamentary procedure.
- ❖ Is prepared to advise the presiding officer and other chapter members on the parliamentary procedure.



Members are the core of every organization. Your members contribute to the overall well being of your chapter. In order to get your chapter started, you first need to boost your membership.

In order to attract members, you need to get the word out about Phi Beta Lambda in an *organized and interesting* way.

TIPS FOR MEMBERSHIP RECRUITMENT

1. **Publicize Phi Beta Lambda.** Get a list of all business students (and others, depending on your needs) at the school, and mail letters inviting them to Phi Beta Lambda meetings.
2. **Plan dates and times for** meetings for a long block of time in advance (semester, quarter, six months). Put this information in a calendar of events that can be passed out or mailed to each member/prospective member concerning each meeting.
3. **Set up recruitment tables** with Phi Beta Lambda literature available – use National and State handouts and prepare local handouts emphasizing accomplishments of the local chapter. Get chapter members involved in recruitment by offering incentives, such as prizes for outstanding recruitment.
4. **Speak to new students** or freshmen (depending on type of educational system) at orientation sessions or something similar. Students usually select the open organizations that they are interested in being a part of during the first year at the post-secondary institution.
5. **Advertise** meetings in school papers, community papers, and with posters.
6. **PLAN FIRST MEETING COMPLETELY.** Make a good impression. An outstanding guest speaker can make the first meeting one to orient prospective members on what Phi Beta Lambda does and has to offer – in other words, *IMPRESS THEM*. Your first meeting may very well be your largest, and students usually have the lightest school load at the first part of the school program.

Chapter Meetings



Holding organized and efficient chapter meetings on a regular basis is vital to the success of your chapter.

Use your meetings as an opportunity to:

- ❖ Attract new members
- ❖ Elect officers
- ❖ Exchange ideas for activities
- ❖ Implement your ideas
- ❖ Listen to expert speakers

Materials needed: To hold successful meetings, you need:

- ❖ An Agenda (to keep things moving)
- ❖ An appropriate room
- ❖ Participants
- ❖ A specific time frame (from this time to this time)

Brainstorm

Don't be afraid to make the meetings fun. It is a time to get those needed business items done but it is also a time to get to know each other better.



Annual state and national conferences focus on leadership and management. They emphasize the social, as well as educational, aspects of FBLA/PBL participation, in addition to providing members with extensive and varied opportunities to:

- Learn
- Communicate
- Socialize
- Exchange ideas
- Travel
- Gain recognition
- Network
- Forge friendships
- Share success stories
- Compare skills and achievements
- Elect leaders
- Build enthusiasm
- Improve communications
- Promote growth

Individual conference agendas vary, but generally they include informative lectures, workshops and seminars; competitive events and at the individual, team, chapter, state, regional and national levels; theme dances; election of officers; and recognition awards.

Competitive events fall into three categories: the individual, the team, and chapter. Chapter awards recognize overall achievement and performance in chapter management and growth; individual and team events focus on specific skills useful in leadership and career development.

On the following page is a partial listing of the nationally based competitive events. Check with your state representatives for specific procedures and time schedules established for Pennsylvania.

Individual Events

Accounting Principles
Accounting for Professionals
Business Communication
Business Law
Business Plan
Businessperson of the Year
C++ Programming
Computer Applications
Computer Concepts
Economics
Finance
Future Business Executive
Future Business Teacher
Hospitality Management
Human Resource Management
Impromptu Speaking
Information Management
International Business
Java Programming
Job Interview
Management
Marketing
Multimedia Presentation
Networking Concepts
Public Speaking
Sales Presentation
Sports Management and Marketing
Statistical Analysis
Telecommunications
Visual Basic Programming
Web Site Development
Who's Who in PBL
Word Processing

Team Events

Business Decision Making
Business Plan
Desktop Publishing
Emerging Business Issues
Multimedia Presentation
Network Design
Parliamentary Procedure
Web Site Development

Chapter Events

American Enterprise Project
Community Service Project
Gold Seal Chapter Award of
Merit
Local Chapter Annual
Business Report
Partnership with Business
Project
State Chapter Annual
Business Report

“Witnessing student accomplishments is what keeps many of us teaching.”

The success of FBLA-PBL rests on the shoulders of active members but the inspiration and guidance comes from the advisor.

An advisor acts as the liaison between students and school administrators.

The advisor also supervises the local chapter’s efforts and instructs students, while leaving chapter control to the young men and women themselves.

“We can teach students skills that will equip them for their chosen occupations. But the opportunity we have to polish those skills and add that little something extra increases dramatically when we serve as advisor.”

The Advisors Role

You are a facilitator – you make things happen, but don’t (necessarily) do the work yourself. Stand by your membership, in all senses of the words. Through their actions and your good management, let your people grow and develop.

General Management

- Be adaptive, innovative and creative.
- Know your stuff (Ex: history, principles, bylaws, ceremonies, typical activities).
- Be aware of the guidelines for state and national competitive events.
- Be up-to-date with all FBLA-PBL related policies, documents, publications, procedures, etc.
- Share with members all materials received from national and state offices.

Liaison

- Ensure that the school administration, faculty, students and the public are informed of chapter activities and outstanding student achievements.
- Serve as a liaison between the chapter and the school administration.
- Meet with other business teachers and advisors to gain their support and learn from their successes and failures.
- Secure approval from local, state and national agencies when appropriate.

Leadership Development

- Work cooperatively with students and academic teachers in developing skilled leaders.
- Encourage members to elect officers who are able and willing to provide leadership for the chapter.
- Help develop an effective officer team.
- Identify training opportunities for chapter officers to help them fulfill their duties.
- Counsel and advise chapter officers on an ongoing basis.
- Allow the chapter to be student-led rather than advisor-led.

Installation Ceremony



Whenever possible, the installation ceremony should take place before a large group such as 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 raised platform.

Materials Needed:

1. Tall Candle
2. Candles: White, Gray, Green, Violet, Blue, Yellow, Orange, Red
3. Official Carter
4. Names of Charter Member

Induction of Officers

Installing Official: “Will the newly elected officers of _(Chapter Number)_ Chapter of _(Colleges Name)_ please come forward as I announce your office. (*Installing official lights the 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 which he/she has been elected.”

Historian/Public Relation:

_____, Historian. (*Historian/PR comes forward*).

Installing official: “You have been elected Historian of the _____ Chapter _____ College. 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.”

Installation Official: “I now declare you in the name of the _____ Chapter _____ College the Historian.” (*Historian selects the green candle from the table, and installing official lights it with the white candle.*) “This lighted candle symbolizes the satisfaction that can be derived from preserving the past and recording the present, while preparing for the future.”

Parliamentarian:

_____, Parliamentarian (*Parliamentarian comes forward*).

Installing Official: “You have been elected Parliamentarian of the _____ Chapter _____ College. As parliamentarian, it will be your responsibility to monitor all formal chapter meetings so 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.”

Installation Ceremony



Installing Official: “I now declare you in the name of the _____ Chapter _____ College the Parliamentarian.” (*Parliamentarian selects the gray candle from the table, and installing official lights it with the white candle.*) “This lighted candle symbolizes the achievements possible when chapter meetings are conducted in an orderly fashion.”

Treasurer:
_____, Treasurer. (*Treasurer comes forward*).

Installing Official: “You have been elected Treasurer of the _____ Chapter _____ College. 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.”

Installation Official: “I now declare you in the name of the _____ Chapter _____ College the Treasurer.” (*Treasurer selects the blue candle from the table, and installing official lights it with the white candle.*) “This lighted candle symbolizes the trust and confidence which the members have in your ability to safeguard all funds.”

Secretary:
_____, Secretary. (*Secretary comes forward*).

Installing Official: “You have been selected Secretary of the _____ Chapter _____ College. 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.”

Vice President:
_____, Vice President. (*Vice President comes forward*).

Installing Official: “You have been elected Vice President of the _____ Chapter _____ College. 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.”

Installation Official: “I now declare you in the name of _____ Chapter _____ the Vice President.” (*Vice President selects the orange candle from the table, and installing official lights it with the white candle.*) “This lighted 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 this chapter.”

President:
_____, President. (*President comes forward*).

Installation Ceremony



Installing Official: “The members of the _____ Chapter _____ have bestowed upon you a great honor in electing you the President. Your major responsibility is 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.”

Installation Official: “I now declare you in the name of the _____ Chapter _____ College the President.” (*President selects the red candle from the table, and installing official lights it with the white candle.*) “This lighted candle is the symbol of your duties and obligation to the chapter and its members.”

Installing Official: (*Addressing members of the chapter.*) “In your presence, I now declare them officially installed as officers of the _____ Chapter _____ College. You may be seated”

New Member Induction

Guide: Ms./Mr. President, these candidates have expressed a desire and meet the requirements to become members of the _____ College chapter of Future Business Leaders of America-Phi Beta Lambda.

President: (*to the candidates*) We accept you as candidates for membership in the FBLA-PBL. Our organization provides a relevant context for learning, including practical applications for the classroom skills and knowledge. These programs will help you connect to your school, your community, and to the business world. Would you all please rise, raise your right hand and repeat after me:

***I solemnly promise
To uphold the aims and responsibilities
Of Future Business Leaders of America-
Phi Beta Lambda
And as an active member,
I shall strive to develop
The qualities necessary
In becoming a responsible business leader.***

You may be seated. Will the secretary please come forward?

As the secretary reads each of your names, please come forward to receive your membership certificate. Will the secretary please read the membership list? (*At this point, the local President steps back from the podium – to the right of the secretary – to present membership certificates. If a State or National Officer is present or a school official, they could also be on stage to shake the hands of the new members as they come across the stage to receive the membership cards and/or certificates.*)

Secretary: (*Reads each name from the membership list. Members come forward to receive their membership certificates and shake hands of officers and officials on the stage.*)

President: (*After all members are named and have received their membership certificates.*) “Welcome to the _____ Chapter of Future Business Leaders of America – Phi Beta Lambda, Inc. You are now officially accepted as members in good standing, entitled to your full rights and responsibilities. You may be seated.”