Starting a Professional oSTEM Chapter

November 9, 2023

Welcome

We're really glad that you're interested in starting an oSTEM chapter. Starting a chapter is a commitment and we applaud you for taking on this challenge. This guide will go through some of the common tasks and issues you may face while starting your chapter. It is intended to be a broad guide to help chapters in many places, but is not designed to be comprehensive.

In this guide, we aim to provide you with a better understanding of:

- The requirements for being an oSTEM professional chapter
- Best practices for structuring and organizing your chapter's leadership
- Supplemental resources for starting a new chapter
- Ways to get interest from new members and build a community in your chapter
- Common challenges that new chapters face and ways to overcome them

Thank you so much for your interest in joining our organization and expanding our community.

Sincerely,

The oSTEM, Inc. Professional Membership Team

Contents

Professional Membership Team

The Professional Membership team is a group of oSTEM Inc. volunteers tasked with helping professional chapters receive the support they need as they begin the process of becoming an effective and successful organization. They can answer questions you may have and lend advice when starting your chapter. To get in contact with the team, please email professional@ostem.org.

General Steps to Start a Chapter

The steps you take to start a new oSTEM chapter can vary based on the location and available resources. While the process does vary, there are some common steps that every new chapter goes through. Those steps are listed below. While the steps are ordered, people often find themselves working on more than one step at a time.

1. Reach out to an oSTEM Professional Membership representative.
   a. The oSTEM representative will help guide you through the process of starting a chapter and can answer any questions along the way. The professional membership team will be the main point of contact between the chapter and oSTEM, Inc.
   b. The team's email address is professional@ostem.org
2. If not already, sign up to join the global oSTEM membership.
3. Find other people interested in leading an oSTEM chapter.
   a. oSTEM recommends that chapters have at least three (3) leaders.
   b. Tips on finding people to help start the chapter are in the subsection of this chapter guide, Finding Other Chapter Leaders.
4. Create a chapter constitution and define the chapter's goals.
   a. Understanding the chapter's goals and defining who is responsible for coordinating chapter activities is essential to the sustainability of a professional chapter. Therefore, oSTEM requires that professional chapters write a constitution that defines the chapter goals and leadership roles. More information on how to write a constitution are in the subsection of this chapter guide, Writing a Chapter Constitution.
   b. Your oSTEM professional membership representative is available to help you identify your chapter's goals and create a constitution.

5. Begin forming the chapter.
   a. Establish social media accounts
   b. Create a membership list to begin growing the chapter base
6. Fill out the [oSTEM New Chapter Application Form](#).
   a. Please email [professional@ostem.org](#) if you have any questions or issues when filling out the new chapter application form.
7. Plan your chapter's first event and start promoting the chapter.
   a. Some tips on planning events and promoting the chapter can be found in the subsection of this guide, [Building and Maintaining Interest in the Chapter](#).
   b. oSTEM has many resources for new chapters. Visit the subsection of this chapter guide, [Resources for New Chapters](#), to find additional tips and resources to help you get started.
8. Complete the oSTEM New Chapter Onboarding program.
   a. The new chapter onboarding program includes meeting with a representative from the professional membership team, obtaining chapter approval, and completing the check-in form.
   b. **Approximately 1 to 2 months after your chapter is approved**, an oSTEM professional membership volunteer will contact your chapter and ask you to fill out the [professional chapter check-in form](#) with some questions about how your chapter is doing, what your plans are for the near future, and how frequently you would like to meet with an oSTEM volunteer.
   c. **1 to 2 months after filling out your first check-in form**, your chapter will meet with a volunteer to discuss your chapter's progress and other important topics new chapters should keep in mind.
   d. **1 to 2 months after the check-in meeting**, your chapter will be asked to fill out the check-in form again. After that, your chapter will officially have completed the onboarding program.
9. Formalize chapter finances by setting up a bank account for a community group. This could include registering with the IRS to obtain a United States Tax ID number.
10. Get setup as a not-for-profit club. Refer to the subsection of this chapter guide, [Finances](#), for more information.

Finances

The oSTEM Professional Membership team has a budget to assist professional chapter activities. Funding is available to support new chapter development and help grow more established chapters. Financial support for any professional chapter activity is subject to the oSTEM Code of Conduct. The team will review the request before approval. Funds are distributed on a reimbursement basis, unless under special request, and disbursed via PayPal. This usually takes between two weeks and one month. Please note that per the oSTEM Code of Conduct, oSTEM Inc. cannot provide funds for any direct purchase of alcohol.

Funding Application Forms:
- New Professional Chapter Funding Application Form
  - Objective: To help new chapters recruit members and plan their first member event.
- oSTEM Professional Chapter Funding Application Form, for established chapters
  - Objective: To help an established chapter expand their membership, provide professional development opportunities, or expand member networks.
- Complete the Chapter Funding Receipts Form to be reimbursed.

Once a chapter is formed and operational, we encourage you to develop the chapter into a community non-profit. Once established as a non-profit, this will allow your chapter to have its own community bank account, as well as direct local sponsorship. oSTEM, Inc. does not collect dues; membership runs on a voluntary recommended donation basis. Individual chapters can charge dues to raise funds for their chapter once a chapter bank account is established, but it is not inherently necessary.

For more information about chapter funding, please email professional@ostem.org.

Becoming a Recognized Professional Chapter

Finding Other Chapter Leaders

oSTEM highly recommends that a professional chapter have at least three chapter leaders. Beyond that, running an oSTEM chapter is far easier when there is a team, so finding others interested in starting a chapter should be one of the first priorities.

If you're looking for other chapter leaders to help start your chapter, try reaching out to your employer's LGBTQ+ Employee Resource Group (ERG), and/or other local LGBTQ+ or STEM organizations and meetups. Ask them to share a message you've prepared about oSTEM and a way people can express interest and share contact info, such as a Google Form. You may also ask about taking a few minutes to present at a meeting or posting flyers in places where others will see. In short, try to leverage resources and networks available to you to find others who share your interest in oSTEM.

Writing a Chapter Constitution

Your chapter's constitution should be the guiding document your chapter uses to operate. It should contain at least the following items:

- Organization description, including name, goals/mission/purpose, and affiliation with oSTEM Inc.
- Code of conduct for members and chapter officers.
  - Please see the oSTEM Code of Conduct. If your chapter is part of another organization, they may also have a separate code of conduct.
- Description of chapter officer/leadership positions.
- Requirements for becoming a member of the chapter, including any dues required.
- How new chapter leaders will be selected, such as via election or appointment, and any rules governing the selection process.
- Procedure for amending the chapter constitution.
- Any requirements specific to your educational institution.

An example constitution can be found here: Example Chapter Constitution. If would like more assistance in writing a formal chapter constitution, please email the oSTEM Professional Membership team at professional@ostem.org.

Structuring the Chapter

Defining Leadership Positions

Running an oSTEM chapter is not easily done by one person and involves a number of different tasks. Having clearly defined leadership positions before starting your chapter helps keep the workload balanced and ensures that all the responsibilities of running an oSTEM chapter are accounted for.

When defining leadership positions, consider the following questions:
- What routine tasks will your chapter be doing on a regular basis?
    - For instance, will your chapter be posting social media updates every week or sending out a monthly newsletter? Will your chapter be participating in any local events such as Pride and need to prepare handouts or a display?
- How much time will each of these tasks take?
    - If possible, record the actual time it takes to do those tasks.
    - Ensuring that no single leadership position requires a significantly greater time contribution than any other can help reduce burnout and make your chapter's leadership more team-oriented.
- Will having certain leadership positions help your chapter meet its goals?
    - Consider creating positions that will focus on achieving specific goals.
- How many total leadership positions does your chapter truly need?
    - Having a large number of leaders may allow your chapter to take on more ambitious projects, but may make communication more challenging and may make filling all the leadership positions difficult. Conversely, having a small number of leaders could lead to larger workloads and a reduction in what your chapter aims to accomplish.
    - Most fully established chapters have between four (4) and seven (7) leaders.
    - The number of leadership positions can change as the chapter develops.

Planning Leadership Transitions

Having a good leadership transition plan is an important part of ensuring your chapter is around after you are no longer leading it. While starting and leading your chapter, you will accumulate knowledge and resources, and it is important to pass them on to new leaders to ensure chapter success.

Consider incorporating these practices when planning your leadership transition:
- Elections in the middle of the year.
  - Mid-year elections allow for some overlap between former leaders and new/incoming leaders. Having former leaders still engaged with the chapter and part of the local community often helps new leaders when they have questions about how the chapter is run. This also avoids any miscommunication during the end and beginning of the year holiday seasons.
- Written guides for running the chapter.
  - Create documents that contain information important to running your chapter and keep them in a location such that new leadership can access these documents easily i.e. Google Drive or DropBox
  - Note what digital resources your chapter has, e.g. social media account, email accounts (including your chapter's official oSTEM email account), cloud storage, etc., and how to access them.
  - Document your chapter's funding sources and any application process that they may require.
  - Write down the procedure your chapter uses for reserving physical spaces, both for routine meetings and nonrecurring events.
  - Compile information about the best practices you've found for scheduling meetings, communicating with members, talking to sponsors, and any other regular tasks you've had to do while running your chapter.
  - Create a clear list of responsibilities each leadership position has and how/when those responsibilities are done.
  - Compile a list of contacts that are useful/helpful to your chapter, such as queer or allied professor/staff and corporate contacts

- Introductory (a.k.a. entry -level) leadership positions.
  - If feasible, create a leadership position set aside for early career members. This is a good way to get newer members interested in being a leader and also provides a potentially less intimidating and/or competitive leadership position that newer members can run for.
- Formal leadership transition period.
  - This can take many forms, but the general goal is to set aside some extended period of time where both outgoing/continuing and incoming leaders discuss the leadership transition and outgoing leaders assist incoming leaders take the reigns.
  - On the short end, a weekend retreat where outgoing/continuing leaders teach new leaders about how the chapter runs can be helpful.
  - On the long end, a period of time, anywhere from a month to a season, where incoming leaders shadow outgoing leaders can be even better for ensuring a smooth transition.

Building and Maintaining Interest in the Chapter

Promoting the Chapter

As with any professional organization, and especially one involving building a community of LGBTQ+ STEM professionals, it is important to reach out to as many people as possible. When starting a new chapter, gathering interest and recruiting new members can be difficult, but extremely helpful to ensuring the longevity of your chapter.

Some ways to promote or advertise your new organization include:
- Email
  - This is a very simple way to spread information about your chapter and can be potentially wide-reaching.
  - Emails need to be engaging/eye-catching in order to stand out from the multiple emails that most professionals receive daily.

- ○ Email promotion can also be very low commitment (there may not be enough of a strong call to action to encourage or gather interest).
- Flyers
  - ○ Placing flyers around the city or during certain events can be an effective way to advertise for your new organization if they are placed in areas with high visibility/high traffic.
  - ○ Like emails, these need to be well designed and eye-catching in order to be successful.
  - ○ Flyers can reach others within the greater city community (may or may not be within the target audience of your organization).
  - ○ Make sure to check with an organization's policies about flyers before finalizing them to avoid any laws/rules on littering or solicitation.
- Word of Mouth
  - ○ Telling people about your organization typically is a stronger call to action than flyers or emails (people are more likely to commit to showing up for a meeting when personally asked).
  - ○ Reach out to other organizations that share similar goals (e.g. professional organizations in STEM or LGBTQ+ organizations) and ask if you can talk about oSTEM for 5 to 10 minutes in their next meeting.
- Social Media
  - ○ Consider asking your local diversity or LGBTQ+ centers and other organizations to share posts on their social media platforms.
  - ○ If you, other chapter leaders, and members are part of any group chats, Discord servers, or similar, ask if they'd be willing to share a message about oSTEM through those channels.
- Tabling
  - ○ Attend local events in your area and set up a booth to market your local chapter.

Fostering a Welcoming Environment

In order to maintain and increase membership of your organization, it is vital to ensure that the environment of your organization's meetings and events is inclusive and accessible. This includes the space in which general meetings are held, events hosted by your organization, as well as the attitude and behavior of your members.

- General tips for inclusion
    - Ask for and respect others' pronouns! This is a basic courtesy for members of a queer organization, but it bears reiterating here, since it helps create a welcoming space.
    - Provide space for others to contribute to discussion or give input. There are different systems that you can use to facilitate discussion (such as Robert's rules of Order), but regardless of the method, you want everyone to be able to contribute to the conversation.
- Accessibility
    - Everyone should be able to attend meetings or events without significant obstacles to participation.
    - Things to consider with accessibility: location, transportation, dietary restrictions, signage, event content.

Basic Event Planning

As an organization for LGBTQ+ people in STEM, there are a wide variety of events that you can plan for your members, even as a new chapter. This section will talk about different types of events that your chapter can host as well as some tips on how to have a successful event.

- Types of events
    - Social events - typically for your members to get to know each other and to develop bonds within the organization.
    - Professional events - for members' professional growth, career development, networking, etc.
    - Service events - community service events can help to grow chapter presence in the community and foster good will

- Tips for event success
  - SMART (Specific, Measurable, Attainable, Relevant, Time-Based) Goals can be used to help determine event success
  - Specific - Ask questions about the goal of the event, and try to be as specific as possible, e.g. who is the target audience, where will the event be held, etc.
  - Measurable - Use qualitative and quantitative data as a way to determine whether your event was successful
  - Attainable - Set goals should be realistic and achievable
  - Relevant - Your chapter will likely have a mission statement/purpose, and you should ask how the goals of this event align with the purpose of your organization
  - Time-Based - Deadlines should be set to make sure the event timeline stays on track
- Other tips for event planning
  - Collaborating with other organizations can be a great way to increase your event budget/options, boost turnout, and connect with other groups
  - For event ideas, look to what other oSTEM chapters have done. The Professional Membership team can connect you with other chapters.

Conclusion

Good luck in starting your new professional chapter! We will support your team throughout this process to help start and grow your chapter.

If you have any additional questions or concerns please reach out to your assigned professional chapter liaison or email professional@ostem.org.

Quick Links

[Code of Conduct](#)

[Professional chapter check-in form](#)

Funding Forms:

    [New Professional Chapter Funding Application Form](#)

    [oSTEM Professional Chapter Funding Application Form](#), for established chapters

    [Chapter Funding Receipts Form](#)

[Example Chapter Constitution](#)