



# LOCAL CHAPTER ORGANIZATION

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### ROLE OF THE ADVISER

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

- Be knowledgeable about the history, bylaws, and programs of the national organization for active operation of the local chapter.
- Direct, chaperone, and coordinate supervision of chapter activities.
- Organize the selection process for chapter officers and provide officer training.
- Encourage civic responsibility.
- Assist in the maintenance of necessary chapter records.

- Establish rules and guidelines that will help students lead themselves while remaining consistent with school policies and state and national bylaws.
- Hold regular chapter meetings and see that they are conducted in a business-like manner.
- Assist members and officers in developing an annual program of work, which includes a budget, calendar, and committee assignments.
- Assist members in planning, collecting, preparing, and arranging materials to promote the chapter and its activities.
- Ensure school administration, faculty, students, and the public are informed of chapter activities and outstanding student achievements.
- Be knowledgeable of the guidelines for district/regional, state, and national competitive events and activities and coordinate participation at all levels.
- Oversee financial development projects and supervise the receipt, recording, depositing, and expenditure of chapter funds.



### ADVISER RESOURCES

The “Adviser Area” of the FBLA-PBL Web site ([www.fbla-pbl.org](http://www.fbla-pbl.org)) is a wonderful resource and includes:

- Stock Market Game Information
- Interactive Membership Madness and Mania forms
- Copies of the Adviser Blasts from the National Center
- Electronic *Chapter Management Handbook*

- Local Chapter Ideas and Project Samples
- Membership, Scholarship, and Grant Information and Award Winners
- Tips for Preparing for Competitive Events
- Publications



### ROLE OF AN OFFICER

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

- Provide an environment where all members will grow professionally.
- Keep members informed about all activities of the organization.

- Include all members in a dynamic program of work and welcome suggestions from members.
- Conduct the business of the chapter in proper parliamentary procedure and maintain complete, current records, and minutes.
- Encourage individual and chapter participation in district/regional, state, and national conferences.



## OFFICER ELECTIONS

The election of officers is a serious matter, and qualifications should be the primary consideration. Candidates who are willing to accept a leadership role and work hard preparing to perform their duties will make the most effective leaders.

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.

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 for a local office. **REFERENCE: Sample Officer Application LOCAL-16.** Once the adviser has screened and approved the applications, candidates should be notified that they have met the qualifications for running for office.

In the next meeting, a slate of approved candidates can be presented so the members know who is running for each office. Have each candidate give 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.



## OFFICER RESPONSIBILITIES

All local chapter officers should:

- Be well-educated about FBLA-PBL and understand its purpose, programs, and opportunities available.
- Understand their clearly-stated goals and 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 resources can be organized accordingly.
- Plan all activities and projects well in advance and with complete adviser approval.
- Help the president delegate tasks among all the officers.
- Run interesting, organized, and well-planned meetings.
- Have established a well-functioning committee system.
- Have effective communication with the local chapter adviser.
- Be interested in participating in district/regional, 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.
- Have effective communication with the student members.
- 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 to measure their achievement. **REFERENCE: Point System LOCAL-15.**

A short description of the duties of each officer follows.

### President

- Presides over and conducts meetings according to accepted parliamentary procedure by keeping 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.
- Reviews the program of work with the adviser and the officer team on a monthly basis.
- Calls special meetings as needed.
- Maintains chapter correspondence by writing appropriate letters.
  - Letters should be short and to the point.
  - Letters must be free of typographical and spelling errors—always have your adviser proofread anything before it is sent out.
  - Thank you letters should be sent within one week of the event.
  - Letters also can be written to national, state, and municipal governments in support for legislation such as Perkins Funding, request for recognition, and request for information.
- Coordinates chapter efforts by keeping in touch with officers, members, and advisers.
- Shows interest in the activities of the other officers and inspires 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.

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### Vice President

- Assists the president in the discharge of duties.
- Presides at meetings in the absence of the president and 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.

### Secretary

- Prepares the program of work once it has been approved by the local chapter adviser. **REFERENCE: Program of Work LOCAL-5.**
- Prepares and reads the minutes of each meeting. **REFERENCE: Minutes LOCAL-14.**
- Prepares the monthly chapter report and submits it to the president, vice president, and adviser. Keeps one copy for chapter records. This report helps the vice president prepare the Local Chapter Annual Report at the end of the year. **REFERENCE: Local Chapter Montly Report Form LOCAL-15.**
- Provides the president with an agenda for each meeting. **REFERENCE: Agenda LOCAL-8.**
- 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.
  - Use chapter letterhead if you have it.
  - Proofread—always have your local chapter adviser proofread and approve any correspondence before it is sent.

### Treasurer

- Prepares the chapter budget for the year.
  - A budget is necessary in the operation of an FBLA 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.
- 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. **REFERENCE: Sample Monthly Financial Report LOCAL-14.**

### Reporter

- Develops media lists for chapter meetings.
- Plans public relations activities for the chapter.
- Gathers and classifies chapter news. Sends chapter news and photos for the FBLA-PBL national Web site to [communications@fbla.org](mailto:communications@fbla.org).
- Prepares new releases and articles for publication in school and local newspapers and in state and national FBLA-PBL publications. **REFERENCE: Sample Press Releases RECRUIT-12.** Remember to include the facts of your story.
- Submits news releases when your chapter shows success at a conference or other events.
- Assists with the planning and arranging of chapter exhibits/booths.
- Prepares a local chapter newsletter at least twice a year for members.
- Helps the vice president with the Local Chapter Annual Business Report.
- Prepares and updates the chapter Web site.

### Historian

❑ Files paper and electronic clippings and pictures of the chapter’s activities in the chapter files, and keeps all chapter files updated on an ongoing basis.

❑ Keeps a chapter publicity and activity scrapbook, and 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 bulletin 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 reference 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.



## 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. A successful FBLA 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. The program of work consists of all the activities planned by the chapter’s standing committees. 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.

### ❑ 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 chapters can apply to their process.

Set long-and short-term goals for the chapter with the local officers. Goals are specific, realistic, and reminders of the accomplishments that you visualize for the officers and the chapter. Brainstorm what your group wants to do.

- 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?

### ❑ Project and 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 fund-raiser, why are you doing that fund-raiser? The answer is not to “raise funds.” The answer is to “raise X amount of funds with X activity.” Make your goals specific and quantify them where appropriate (e.g. recruit ten Professional Division members by November).

### ❑ 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.

### ❑ Resource Identification

What resources do you have available, or could you make available, to help you with your project? These resources include people, money, time, supplies, materials, and facilities. Think through your project carefully and make a list of all the things you have and all the things you will need. Ask questions like:

- Who can help inside and outside the chapter?
- Do you need any special facilities or supplies?
- Can any of your supply, material, or facility needs be donated; or must they be purchased?

### ❑ Task Assignment

Break goals into 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 task unassigned, thinking you’ll get to them later. There is no “later” in planning.

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?
- What are the risks and costs involved?
- 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?

### ❑ **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.

### ❑ **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.

### ❑ **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. Evaluation of the project should also address the processes and intermediate steps as well.



## SUGGESTED ACTIVITIES

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Below are suggested activities that could be included in your program of work. Encourage your officers to be creative and develop activities that work for your chapter.

### **August**

- Hold a local chapter officer training and program of work planning session
- Prepare an FBLA recruitment board

### **September**

- Plan a membership recruitment activity
- Publicize FBLA with flyers to business students and incoming freshmen

### **October**

- Submit initial dues by the October 20 membership deadline
- Sponsor a community service project
- Conduct officer and new member installation ceremonies **REFERENCE: Ceremonies LOCAL 10-13.**
- Submit an article to *Tomorrow's Business Leader*

### **November**

- Plan a fund-raising project
- Celebrate American Enterprise Day on November 15 **REFERENCE: American Enterprise Day PROGRAMS-17.**
- 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
- Attend district/regional competition and begin preparing for state competition
- Hold a midyear planning session with officers

### **February**

- Celebrate FBLA-PBL Week **REFERENCE: FBLA-PBL Week PROGRAMS-17.**
- Plan a job shadowing activity or field trip to a business
- Invite a guest speaker to a chapter meeting

### **March**

- Plan a second semester fund-raiser
- Invite faculty to a chapter activity

### **April**

- Attend the State Leadership Conference
- Participate in March of Dimes March for Babies

### **May**

- Elect new officers
- Sponsor an FBLA chapter awards banquet

### **June/July**

- Attend the Institute for Leaders
- Attend the National Leadership Conference





## SUGGESTED COMMITTEES

Committees are essential to the success of a local chapter. The committee chair should complete a project activity report for every project upon its completion.

Chapter activities should reinforce the FBLA-PBL goals. **REFERENCE: FBLA-PBL Goals PROGRAMS-4.** They should also be tailored to each local chapter. These activities are meant to facilitate intelligent career choices, enhance business skills, and teach the value of community responsibility. Chapter activities fall into five functional areas: professional development, community service, social, fund-raising, 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 careers, providing valuable career orientation and goal-setting opportunities. Guest speakers, panel discussions, and business-related DVDs can be used as instructional programs at chapter meetings. Field trips and business tours demonstrate firsthand what has been discussed in the classroom or at a meeting.

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; and 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.



## 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. They are held to conduct business

### Community Service

Community service activities help the chapter get involved and contribute directly to the community. 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 service organizations like the FBLA-PBL national service partner, the March of Dimes. **REFERENCE: March of Dimes PROGRAMS-18.**

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 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.

### Fund-raising

Fund-raising is important in any FBLA chapter. Revenues above and beyond dues income are needed to support the local chapter's needs. The educational value of conducting a fund-raising event is an important incentive and benefit. Committee members should review the FBLA-PBL partners for fund-raising opportunities. **REFERENCE: Fund-raising Partners FUND-RAISING-4.**

### 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 unless you spread the word through posters, flyers, and bulletin boards.

or to present a specific program; however, they should be organized so that they are not for information only, but also are opportunities for members to become involved and to share their thoughts. In the fall, many chapters install their officers and have a guest speaker. Remember to maintain a balance between business and social activities. Because FBLA is a cocurricular organization, information can be shared before or during business classes.

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The following checklist should be kept in mind:

- Do we hold regular meetings?
- Do we have a written agenda for each meeting?
- Are minutes recorded and read at our meetings?
- Do we allow adequate time for our meetings?
- Do we make assignments during meetings?
- 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 responsibility?
- Do we conduct progress reviews to check our accomplishments?
- Do we recognize and compliment others for their efforts?
- Do we actively seek the general membership opinion?
- Do we communicate our goals and activities to the membership?
- Do we start and end our meetings on time?
- Do we hold an 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 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.

The meeting agenda should include:

- Call to Order—the president signals the meeting will begin. It is followed by one rap of the gavel.
- Opening Ceremony—recite the FBLA-PBL Pledge, the FBLA-PBL Creed, or hold one of the ceremonies. **REFERENCE: FBLA-PBL Pledge and FBLA-PBL Creed PROGRAMS-4. REFERENCE: FBLA-PBL Ceremonies LOCAL 10-13.**
- Roll Call of Members
- Approval of Previous Meeting's Minutes—read by the secretary
  - Distribute minutes before the meeting for 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—treasurer reads report to group. **REFERENCE: Sample Monthly Financial Report LOCAL-14.**
- 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.
  - 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 person making the motion
- Points of order and appeals sustained or lost (including the reasons given by the chair for the ruling)

**REFERENCE: Sample Minutes LOCAL-14.**



❑ The first paragraph of your minutes should be one sentence and include the following in this order.

- The type of meeting—whether regular or special (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.

❑ Each paragraph of the minutes should contain a separate subject. Keep them concise and easy to understand. Here are some tips in preparing the minutes:

- 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.
- Don't write down who debated or what they said.
- Remember not to include your personal opinions.
- Don't summarize a guest speaker's topic; just list the name and the subject.



## PARLIAMENTARY PROCEDURES

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

Below are general parliamentary procedure rules:

❑ The presiding official must recognize a member before he or she may speak.

❑ A member should rise to be recognized and remain standing while speaking.

❑ 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.

❑ Only one motion may be made on the floor at one time. It must be disposed of before another main motion is made.

❑ A main motion must be seconded and stated by the presiding official before it may be discussed.

❑ The maker of the motion has the first right to debate.

❑ 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.

❑ 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.

❑ In case of a tie vote, the motion is lost.

❑ The presiding official may vote to break a tie. The presiding official always votes in case of a ballot vote.

❑ A majority is over half of the members present and voting.

❑ A plurality is the largest number of votes to be given any candidate or proposition when three or more choices are possible.

## FBLA-PBL CEREMONIES

### FBLA-PBL Emblem Ceremony

This ceremony works well for an open house or even the first meeting of the FBLA-PBL year. It also may be used with either the officer installation, new chapter installation, or new member induction ceremony. FBLA chapters should use the FBLA crest. 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 tag board or felt (with Velcro if you are using felt). You also can use the same concept with a PowerPoint® presentation. Once the ceremony is done, you will have a completed emblem.



FBLA Crest

**President:** Welcome to the FBLA-PBL Emblem Ceremony. 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” denotes the idea that every individual should be interested in and take responsibility for promoting a better social, political, and family life. (Place the service cutout on the emblem or in PowerPoint® “service” is displayed)

**Vice President:** *Education:* the word “education” is symbolic of the idea that education is the right of every individual. (Education is placed or displayed.)

**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. (Progress is placed or 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 is placed 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 is placed 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 is placed or displayed.)

**Parliamentarian** (or other officer): *America:* 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. (America is placed or displayed.)

**President:** All the words together stand for Future Business Leaders of America. The emblem 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, group 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 (may substitute color ribbons or flowers):

- Tall candle
- Candles: white, gray, green, violet, blue, yellow, orange, and red
- Official charter
- Names of charter members

**Installing Official:** (standing) FBLA-PBL 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.

(At this point in the ceremony, it may be helpful to provide a brief history of FBLA-PBL. **REFERENCE: FBLA-PBL History PROGRAMS-6.**)

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. **REFERENCE: FBLA-PBL Goals PROGRAMS-4.**

**Installing Official:** Will the new officers of the (school) chapter of FBLA please rise and remain standing as I announce each officer. (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 fulfill 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 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 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, 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 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. 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, 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. **REFERENCE: FBLA-PBL Creed PROGRAMS-4.**

### Officer Installation

**Installing Official:** Will the newly elected officers of the (school) chapter of FBLA 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.

## PBL LOCAL CHAPTER ORGANIZATION

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**(Name of parliamentarian),** parliamentarian. (Parliamentarian comes forward.) You have been named parliamentarian of the (school) chapter of FBLA. 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, 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. 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, 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. 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, 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 chapter of (school).

**(Name of treasurer),** treasurer. (Treasurer comes forward.) You have been elected treasurer of the (school) chapter of FBLA. 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, 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 that 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. 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, 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. 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, 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 that 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 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, 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 for the coming year. (Candles are blown 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.

**President:** (to the candidates) We accept you as candidates for membership in the (name) chapter of FBLA. 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.

**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 (school) chapter of FBLA-PBL, Inc. You are now officially accepted as members in good standing, entitled to your full rights and responsibilities.





## SAMPLE CHAPTER MINUTES

### Colby FBLA Local Chapter Regular Meeting Minutes

#### Call to Order

The first regular meeting of the Colby chapter of FBLA was held on August 25, 2007, at 4:30 p.m. in Room 201 of Colby High School, in Colby, Wisconsin. 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 exhibit had been completed and was on display in the school library. This exhibit also will be displayed during Parent-Teacher Conferences. Members were asked to see Marissa to sign up to help out at the table and to distribute brochures.

#### Unfinished Business

There was no unfinished business.

#### New Business

Tina Lemke moved, and it was seconded, that we decorate the business rooms to promote the Halloween dance. 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 Marie Braatz had been honored at the National Leadership Conference this summer as an Outstanding Local Chapter Adviser. She thanked Mrs. Braatz for her dedication to the chapter and presented her 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  
Colby FBLA Secretary



## SAMPLE MONTHLY FINANCIAL REPORT

### Colby FBLA Local Chapter Report of the Treasurer (November 30, 20\_\_)

<b>Balance on Hand, November 1, 20__</b>	\$1,549.63	<b>Expenses</b> (Disbursements)	
<b>Income</b> (Receipts)		State Leadership Lab	\$80.00
Dues	\$80.00	Nestle Candy Company	125.00
Candy Sales	250.00	Printing	15.00
Spook-o-grams Sales	135.00	Food for Meeting	30.00
Bake Sale	100.00	<b>Total Expenses</b>	<u>\$250.00</u>
Donations	200.00	<b>Balance on Hand, November 30, 20__</b>	<u>\$2,064.63</u>
<b>Total Income</b>	<u>\$765.00</u>		
<b>Total Funds Available</b>	<u>\$2,314.63</u>		





## LOCAL CHAPTER MONTHLY REPORT FORM

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

- FBLA Adviser
- FBLA President
- FBLA Vice President
- FBLA Reporter
- FBLA 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:



## 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	• Holding an Elected Office	20
• Contestant in Competitive Events	20	• Committee Chair	20
• Fund-raising Activities	20	• Recruit a New Member	10
• Assistance with Committee Work	20	• Attendance at Special and Social Events	10
		• FBLA-PBL Activities, Field Trips, Guest Speakers	10
		• Attendance at Regional/District State Conferences	10
		• Attendance at Workshops	10
		• Attendance at State Executive Board Meetings	10
		• Attendance at National Conferences	10
		• Recruiting a Professional Division Member	10



## SAMPLE OFFICER APPLICATION

If you are interested in becoming an FBLA officer for the next school year, please fill out the application below and turn it in to your FBLA adviser by May 1. Qualifications for being an officer are the following:

- you must be a current FBLA member,
- take a business course next year, and
- join FBLA 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, FBLA local activities, and participation in fund-raisers. All officers are expected to assist the chapter in completing state and national reports and forms. Be responsible for seeing that the chapter receives state and national recognition.

Name \_\_\_\_\_

Grade \_\_\_\_\_ Number of Years in FBLA \_\_\_\_\_

Address \_\_\_\_\_

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:

Period	Course	Teacher	Room
1			
2			
3			
4			
5			
6			
7			
8			

Business courses taken (including this year):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Why do you want to become an officer for FBLA? (You may attach a separate sheet of paper.)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_