Handbook for Developing or Modifying a Student Occupational Therapy Association:

*An Organizational Approach**

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Forward

Becoming elected as a Student Occupational Therapy Association (SOTA) president in the second year of a developing occupational therapy program was challenging to say the least. I began to think of questions such as: "How am I going to organize a successful student association?" "Is there a national standard for a SOTA organization?" and "What offices should be created to ensure effective organizational communication?"

Prior to my presidential installation, I had the fortunate opportunity to serve as our school's ASCOTA (American Student Committee of the Occupational Therapy Association) Delegate to Baltimore in April of 1998. During the "Open Forum" discussion, many ASCOTA delegates from across the nation were addressing the question of how to *increase* SOTA membership involvement. Although several ASCOTA Delegates offered solutions to resolve such problems, the **methodology** of such a resolution was unheeded.

The *purpose* of this handbook is to provide the methodology for organizing and leading a successful Student Occupational Therapy Association.

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Preliminary Steps

Before any student organization can be formed, it is essential to investigate the policies and procedures of forming a student organization at your respective educational institution. Contact the regulatory body (i.e., Student Government Association) which oversees the activities of all the student organizations. Explain to them what you are going to form, and inquire about the institutional procedures that are required for organizational formation. Once this course of action is taken, it is time to form your Student Occupational Therapy Association!

For those newly forming SOTAs, the Steering Committee of the Assembly of Student Delegates (ASD) has developed the **Reference Handbook for ASD** (revised, February 2002) which serves as a guide to help form a SOTA organization.

Section V of the Handbook entitled "Creating a Student Occupational Therapy Association" discusses the steps needed to plan and formulate a SOTA organization (refer to document). The document also contains an outline for the "Standard Operating Procedures" for a SOTA. This provides a format with which an outer skeleton of a SOTA can be formed.

Executive Board

After the preliminary steps have been taken, it is time to form the infrastructure of your organization: the Executive Board. Interestingly, there has been no national standard for the formulation of a SOTA Executive Board. The Horizontal Executive Board structure later discussed will act to meet that standard. This is not to say that a SOTA cannot be successful without having such a standard because many SOTAs across the nation have been successful in the organization and implementation of the objectives set forth by their association. However, even successful SOTAs have their problems. This standard may provide some thought and insight on how to overcome some of those obstacles that are commonplace to all.

In order to form an effective and well-rounded Executive Board, many things need to be considered. What constitutes a comprehensive Executive Board? Who is going to fill these offices and how will they be elected? What type of organizational hierarchy, if any, should be used?

Answers to all of these important questions are addressed in this chapter.

Forming a Comprehensive Executive Board

The Executive Board is the cornerstone of any successful organization. Elected Board members formulate, modify, and oversee the semester objectives in respect to their corresponding domain.

One of the most common difficulties facing SOTA organizations is not in the formulation of goals and objectives, but in the *methodology to which it is carried out*. To assure that goals and objectives are achieved, roles and responsibilities must be established for each Executive Board member. In doing so, they will have the responsibility for a narrow scope within the organization.

The role delineation of Executive Board members described herein offers a simple, logical, and organizational approach to forming an effective SOTA infrastructure.

- *President:* Facilitates actions of all Executive Board officers; communicates with institutional regulatory body, state student liaison representative (if one exists) or State Occupational Therapy Association president, the state representative to the Representative Assembly, and the ASD Steering Committee.

- *Vice President:* Collaborates with the president, assists in supervision and facilitation of actions set forth by the Executive Board, and communicates with the student liaisons.

- *Secretary:* Records the minutes at the Executive Board and student body meetings, coordinates location and timing of meetings with the institutional regulatory body, distributes association announcements, and communicates with pre-professional student representative as needed (for those Programs that have an undergraduate track).

- *Treasurer:* Maintains financial records, collects and deposits acquired funds within the regulations of the institutional regulatory body.

- *Fundraising Chairperson:* Formulates and facilitates a Fundraising Committee that will plan and conduct fundraising events within the regulations of the institutional regulatory body, and stores and distributes fundraising resources.

♦ *Public Relations Chairperson:* Formulates and facilitates a Public Relations Committee that will plan and coordinate occupational therapy promotion on campus and in the community (especially during OT Month in April) through workshops, the school newspaper, the school radio station (if applicable), and job

fairs. It also will be the responsibility of the committee to update the SOTA Web site as needed (if one exists).

♦ *Community Service Chairperson:* Formulates and facilitates a Community Service Committee that will organize and promote SOTA involvement in campus and community volunteer activities.

♦ *Social Activities Chairperson:* Formulates and facilitates a Social Activities Committee that will organize formal and informal social events to increase inter-class socialization.

♦ *Historian Chairperson:* Formulates and facilitates a Historian Committee that will maintain a photo album of all members and conduct projects for historical records.

♦ *Professional Development Chairperson:* Formulates and facilitates a Professional Development Committee that will organize and coordinate educational forums from the professional community. It also will be the responsibility of the chairperson to direct the mentor and mentee program.

♦ *ASD Delegate:* Attends all the delegate meetings prior to the AOTA's Annual Conference and Exposition, polls the student body for their advocations and concerns about current issues and proposed resolutions to the ASD Steering Committee; relays the information obtained from Conference to the student body via delegate address; and fulfills task force responsibilities.

♦ *Alternate ASD Delegate:* Resumes the role of delegate if he or she is unable to attend. This office is not an Executive Board position and will expire once Conference is attended.

- ♦ *Class Liaison:* Serves as unanimous liaison between the membership and the faculty/administration. The first year and second year classes each will have one.

- ♦ *Editor of the SOTA Newsletter:* Formulates a newsletter team if needed, gathers and publishes monthly reports from the president, all chairpersons, and task forces as needed.

- ♦ *Pre-professional Class Representative*: (if applicable) Serves as a liaison between the pre-professional and professional phase occupational therapy students and communicates with Secretary as needed.

- ♦ *Advisor:* (a member of your school's faculty, staff, or administration) Becomes familiar with policies and procedures of institutional regulatory body; attends meetings (if required); guides SOTA in contractual agreements and budget development; helps settle organizational conflicts; collaborates with respective student liaison about announcements or issues that the faculty wants to convey with the student body.

Executive Board Elections

The timing of elections is of utmost importance. Timing of elections will vary from school to school depending on your curriculum's setup. Elections generally should occur at a time when the mood of the student body is calm and collected, such as the beginning of the fall semester. Elections should beheld 3 to 4 weeks from the start of the semester.

A common problem that SOTAs' have is the lack of communication between the previous year's elected officers and the newly elected officers. This often leads to role confusion. Therefore, it is imperative to consider fieldwork absences and graduation when electing students for a particular office. An Executive Board member should be on campus for the majority of the year in order to effectively run their domain.

An election pathway should be developed that is purposely geared to include a *balanced representation* of Executive Board members from each class. This equal

representation instills the first year class with a sense of value and purpose that will increase participation from the entire class during SOTA's activities and events.

Election pathways will vary from one SOTA to the next. Each office should last for 12 months. Generally, the following offices could be filled according to whether they are a second-year or first-year professional level student.

[**Figure 2.1**]

Offices for Second -Year Students

President

Treasurer

Fundraising Chairperson

Public Relations Chairperson

Social Activities Chairperson

Class Liaison (Second Year Class)

[**Figure 2.2**]

Offices for First -Year Students

Vice President

Secretary

 ASD Delegate

Alternate ASD Delegate

Community Service Chairperson

Historian Chairperson

Class Liaison (First Year Class)

Each SOTA develops its own protocol as to how its ASD delegate is elected. Figure 2.2 shows that the ASD delegate should be a first-year student. In the Reference Handbook for ASD (revised, February 2002), it states, "it is recommended that a first-year student be elected to go to the ASD Delegate Meetings at Conference." This decision serves two purposes. First, it assures continuity, communication, and advisement between this year's ASD Delegate with next year's ASD Delegate. Second, having a first year student representing your school to ASD again shows the first year students that their contributions are valued greatly.

The ASD election should be *separate* from the Executive Board election and should occur 2 to 3 weeks before final exams in December. It may be a good idea to *let the first year*
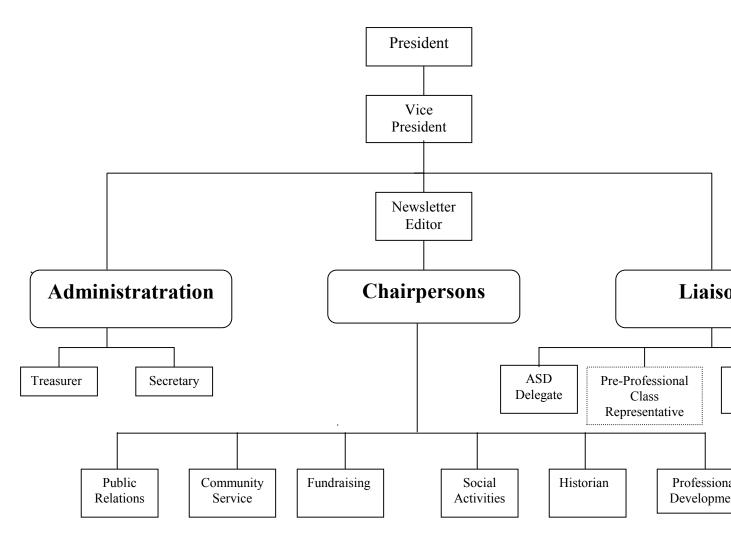
students alone elect the ASD Delegate. By this time in the semester, these students will know who possesses public speaking and leadership qualities indicative of a good ASD Delegate.

Hierarchical and Horizontal Executive Board Structures

The Executive Board structure defines the distribution of power in the organization. Power can be distributed hierarchically or horizontally. In arranging the Executive Board hierarchically, the power of the organization is given to the president. In this manner, the president is the decision maker about organizational matters and affairs. In professional student organizations, this type of Executive Board structure is rarely found.

The most prevalent form of Executive Board structure is the horizontal type. In a horizontal Executive Board structure, the power is shifted away from the President and dispersed to other governing bodies having distinct domains of concern. Figure 2.3 illustrates how a horizontal Executive Board structure can be formed.

[**Figure 2.3**]   Horizontal Organization of the Executive Board

President

Vice President

Newsletter Editor

Administratration

Chairpersons

Liaiso

Treasurer

Secretary

ASD Delegate

Pre-Professional Class Representative

Public Relations

Community Service

Fundraising

Social Activities

Historian

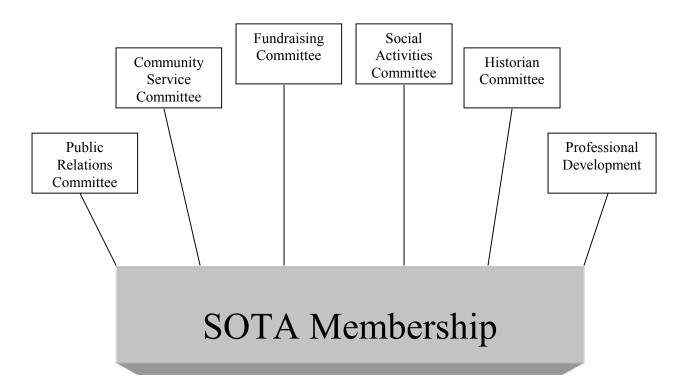Professiona Developme

- - - - - If applicable

The Membership

The membership of a SOTA is defined as those members in the association who are not on the Executive Board. The success or failure of a SOTA is related to the willfulness of the membership to participate in activities. SOTAs often have difficulty recruiting members to participate in activities that have been devised by a single or small number of Executive Board members (called Executive Board-driven organizational design, discussed in Chapter 4). This sends out a bad message. This paternalistic approach implies that decisions are being made for the membership as to what activities will or will not be done. Instead, it is the membership who should direct the Executive Board as to what is or is not desirable to pursue (called Membership-driven organizational design, discussed in Chapter 4).

As Figure 3.1 suggests, the membership has the option of becoming members of the following six standing committees: social activities, fundraising, public relations, community service, historian, and professional development. As a member of one or more of these committees, they will have a direct influence on what the goals and objectives for that particular committee will be.

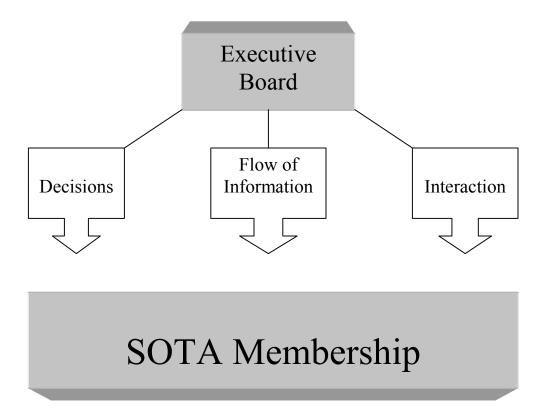[**Figure 3.1**]   Incorporation of the Membership

Organizational Design

There is a great deal of business management literature on organizational design. Just as businesses and corporations need to determine what type of organizational design works best for their purposes, professional student organizations must do the same. The type of organizational design used by your SOTA must be congruent with the needs of your membership in order for your organization to succeed.

Put simply, **organizational design** refers to a particular organizational structure, which outlines *who* and *how* decisions are made. The two primary types of organizational models that exist in professional student organizations are what I refer to as **Executive Board-driven** and **Membership-driven** organizational designs.

Executive Board-driven Organizational Design

Of the two types of professional student organizational designs, this one is probably the most prevalent. A SOTA is generally comprised of two bodies, the Executive Board (Chapter 2) and the Membership (Chapter 3). In the Executive Board-driven organization, the control of the organization's decision making is centralized to the Executive Board. Therefore, a SOTA's semester objectives are decided for the membership as to what, how, and when these events will take place. These ideas are conveyed down (flow of information) with little or no interaction with the membership.
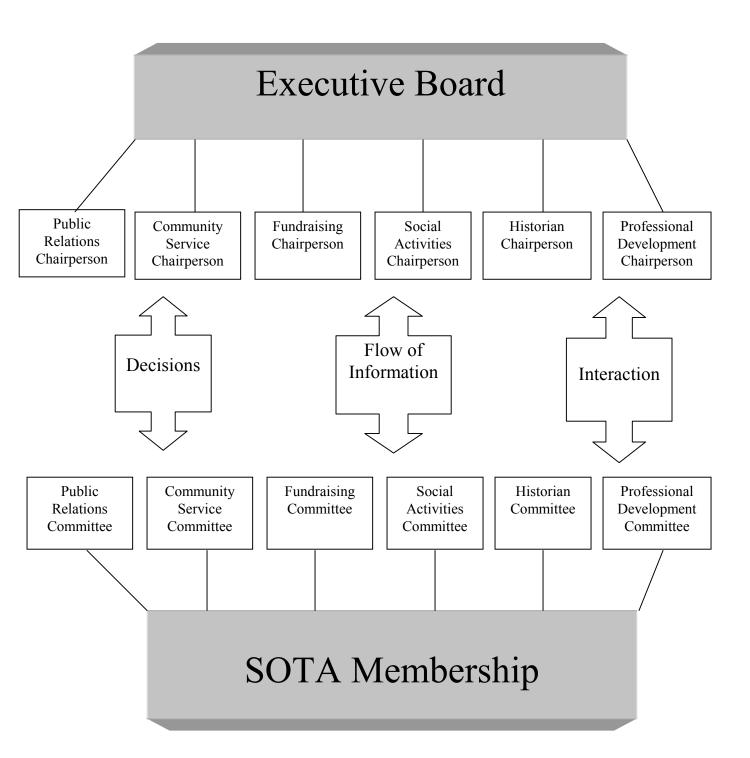
[**Figure 4.1**]

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          ┌───────────────┼───────────────┐
    ┌───────────┐  ┌───────────┐  ┌───────────┐
    │ Decisions │  │  Flow of  │  │Interaction│
    │           │  │Information│  │           │
    └─────▼─────┘  └─────▼─────┘  └─────▼─────┘

    ┌─────────────────────────────────────────┐
    │           SOTA Membership               │
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Membership-driven Organizational Design

Conversely, in the Membership-driven organizational design, the control of the organization's decision-making is decentralized from the Executive Board to include the membership. In this design, a SOTA's semester objectives are decided by the membership as to what, how, and when these events will take place. These ideas are then conveyed to the Executive Board where interaction between the two bodies takes place. This process is made possible with the incorporation of five standing committees within SOTA (Chapter 3). These six committees include: public relations, community service, fundraising, social activities, historian, and professional development. Each committee is comprised of the membership and the respective Executive Board chairperson in charge for facilitating that committee.

[Figure 4.2]

Executive Board

| Public Relations Chairperson | Community Service Chairperson | Fundraising Chairperson | Social Activities Chairperson | Historian Chairperson | Professional Development Chairperson |

Decisions

Flow of Information

Interaction

| Public Relations Committee | Community Service Committee | Fundraising Committee | Social Activities Committee | Historian Committee | Professional Development Committee |

SOTA Membership

Choosing Your Organizational Design

Choosing which organizational design for your SOTA depends largely upon the size of your SOTA. Generally, smaller SOTAs of less than 20 members may function well with the Executive Board-driven organization whereas SOTAs larger than 20 members would benefit from using a Membership-driven organizational design.

SOTAs with less than 20 members typically lack the manpower to run a Membership-driven organization. However, if the Executive Board officers join in one or more of the six standing committees, than it would be possible to operate under this type of model and achieve success.

SOTAs with more than 20 members operating under the traditional Executive Board-driven model may want to consider transforming their organizational structure to a Membership-driven model. The reasons for doing so are depicted in Figure 4.3.

[**Figure 4.3**]
Benefits of the Membership-driven Organizational Design

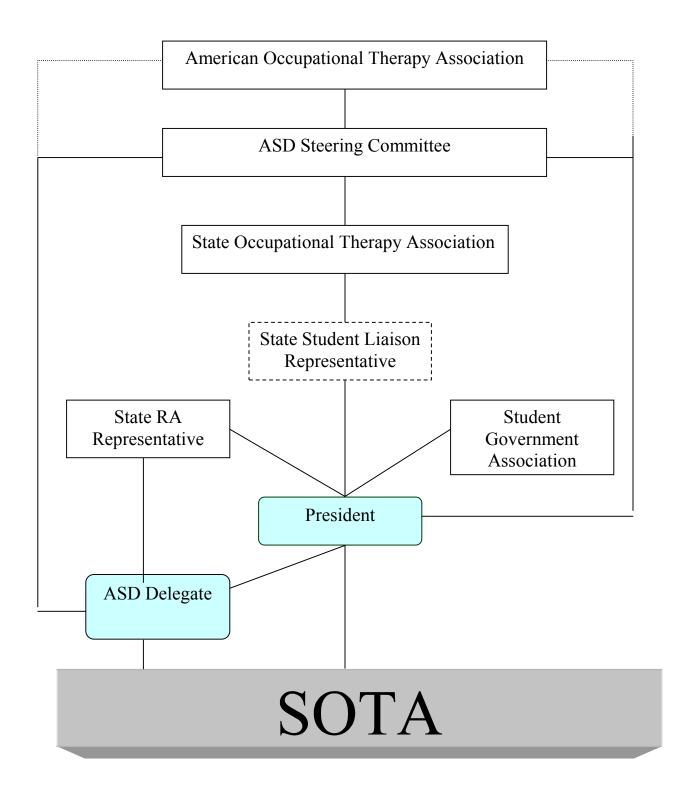With the membership having control over organizational goals, the following occurs:
1. _Cohesion_ between membership and Executive Board
2. _Elimination of hidden agendas_ or incongruent personalities between a member and Executive Board officer making organizational decisions. This often influences membership participation in organizational activities and/or events
3. _Pride_ of knowing members were an integral part of an activity or event's success
4. _Recognition_ by the Executive Board for this success
5. _Motivation_ to participate in the planning and implementation of future activities and/or events

SOTA Schematics

Just as SOTA is representative of one's occupational therapy or occupational therapy assistant program, it also fits into a much greater hierarchical scheme. In order for a student organization to have a voice and impact on current issues that impact the occupational therapy profession, it is essential that your SOTA keep in communication with both State Occupational Therapy Associations and AOTA. Figure 5.1 illustrates this configuration.

As outlined in Chapter 2, it is the president's responsibility to communicate with the state student liaison representative (if one exists) or State Occupational Therapy president, the state representative to the Representative Assembly, and the ASD Steering Committee. The ASD Delegate can provide assistive input after he or she has attended Conference. Input can be defined as submitting articles to AOTA publications and/or your State Occupational Therapy Association newsletter; writing letters or emails to any occupational therapy figure about your SOTA's opinions, ideas, or accomplishments; contributing to the *ASD Listserv* or other related occupational therapy listservs; or any other method of communication deemed appropriate.

[**Figure 5.1**]   Expanded Schematic Role for SOTA

Effective Communication

In order for methodology to become reality, effective communication must occur along all levels of the SOTA organization. All too often, Executive Board members become confused when no one remembers the times and places of meetings and events. This may not be due to the lack of publicity, but because of the form in which the information was relayed.

Using a SOTA Meeting format alone to disseminate information to the student body is insufficient. This is true for two main reasons. First, not everyone attends the meeting. Second, just because something is announced does not mean that the audience has retained it. Attention spans often fluctuate between numerous announcements that are read within a short period of time.

<u>Four Ways to Optimize Communication</u>

An old advertising aphorism says that the best way to reach an audience is to give a message at least three times in order to optimize the recipient's retention. This certainly applies to the communication within an SOTA as well. Not only should a message be conveyed subtly at least three different times but in at least three different forms.

The first way of communicating ideas and announcements is through the traditional SOTA Meeting. Organizing and preparing for a SOTA meeting will be discussed in Chapter 7.

The second approach for effective communication is to develop an occupational therapy bulletin board. It is recommended that a large, marker-erasable calendar be placed in an area that all students can access daily.

Announcements may be visualized within the context of an entire month. This helps the student record, plan, and organize a particular event around his or her own personal schedule.

The third approach to communicate information to the membership and Executive Board is to utilize a file crate system. A file crate system is like having a personal mailbox. Each student will have his or her own file where he or she can retrieve announcements and notes from one student to another. Faculty also can use them to return exams and papers.

The fourth approach to communicate information to the membership and Executive Board is to develop a Student Occupational Therapy newsletter. This is a fantastic way to motivate and keep everyone informed of past, present, and future events. A newsletter computer program can be purchased at any computer store.

Advent of the SOTA Newsletter

If the decision is made to develop a newsletter, an editor will need to be chosen and elected into the Executive Board structure. Just for organizational purposes, the Newsletter can be divided into several sections, such as featured SOTA events and accomplishments; National/State Affairs; President's Corner; Editor's Notes; and Executive Board Registry.

Featuring SOTA events and accomplishments is an excellent way of giving credit where credit is due. Chapter 7 will explain who is expected to compose articles. Printing the names of the students who participated provides them with deserved recognition from their peers and faculty. The National/State Affairs section will orient the student body about relevant issues impacting the profession.

The President's Corner allows the SOTA president to relay any information deemed necessary. The Executive Board Registry includes the names, phone numbers (optional), and e-mail addresses of all Executive Board members. This is useful for student body members to contact Board members about any questions or updates relative to their specific domain. Finally, the Editor's Notes section should include a statement encouraging any student or faculty member to compose future articles, as well as any other information relevant to the newsletter.

Meetings

The greatest way to disseminate information to all members of SOTA is to implement structured monthly meetings on both the Executive Board and Membership level.

Executive Board Meetings

Typically, Executive Board Meetings should occur on a monthly basis and 1 week prior to the Student Body Meeting or commonly called the "SOTA Membership Meeting."

All Executive Board officers attend the Executive Board meeting. The meeting should be conducted in an organized manner with a set agenda. Typically, "Robert's Rules" are used to provide the Board with the organization needed to run a meeting efficiently. The president should acquaint himself or herself with these rules. The structure of the agenda may vary from organization to organization, but should include a few key elements. The following elements should be typed and distributed to all officers.

- *Call to Order:* The president begins the meeting by calling the meeting to order. This is an appropriate time for each officer to introduce himself or herself to one another (especially after elections). The agenda is passed out.

- *Minutes of Previous Meeting:* The Secretary will pass out the minutes taken from the previous meeting for review by the Executive Board. Each officer is given a minute or two to correct any mistakes that have been recorded. A motion is then offered to accept the minutes (with or without corrections).

- *Correspondence:* The president or vice president will read announcements obtained from ASD, the school's regulatory body, faculty, or any other document deemed meaningful to the organization. Photocopies of important documents should be distributed to all officers. Time then will be given to the other Board members to relay any correspondence not previously mentioned.

- *Treasurer's Report:* The Treasurer will orient the Executive Board to the organization's financial status. This verbal report should be accompanied by a revised spreadsheet of SOTA's income, expenses, and account balance since the last Executive Board meeting.

- *Old Business:* This is the time for each Board member to discuss briefly the events (relative to their domain) that have occurred from the time of the last Executive Board meeting.

- *New Business:* Each Board member will briefly discuss his or her objectives to be achieved by the next Executive Board meeting. Presidential and chairperson reports are submitted to the editor of the SOTA newsletter for publication.

- *Open Floor:* Finally, the floor is open to anyone to ask questions or make any last minute announcements.

- *Class Mediation:* Information is relayed between membership and faculty/administration.

- *Adjournment:* The meeting is motioned to end.

An essential ingredient to having a successful Executive Board Meeting is time management. Generally, a meeting can be conducted in an hour. This means that the president needs to carefully keep track of time so enough time will be allotted for later items on the agenda.

As outlined in the "new business" portion of the agenda, all six chairpersons are required to submit a brief article discussing announcements that the committee would like to inform the rest of the membership. Typically, this newsletter issue should be completed and photocopied for all members prior to the membership meeting.

SOTA Membership Meetings

As outlined in Chapter 6, all four means of ensuring effective communication should be utilized to maximize the attendance and involvement of the student body.

SOTA membership meetings are conducted according to a similar agenda format used for Executive Board meetings. However, two additional items are to be included.

First, these meetings provide the means to incorporate the membership into the decision-making processes of the organization. This is accomplished by having the membership sign up for one or more of the six standing committees (Fundraising, Public Relations, Community Service, Social Activities, Historian, and Professional Development) to formulate the semester objective(s).

Secondly, the last item on the agenda is "class mediation." Class mediation is a semi-structured forum in which class concerns are to be discussed. It is to be announced that no minutes will be taken during this time. The purpose of class mediation is twofold. First, it allows the opportunity for the student liaisons to relay announcements given by the SOTA Advisor and faculty/administration. Secondly, it allows each class of the membership to relay information or concerns to the faculty and administration. This is accomplished by allowing the membership to raise issues of concern on the floor.

All students (especially upperclassmen) are encouraged to offer solutions to a concern before it is taken by the class liaison for action. Those issues that the membership majority feels that need to be resolved will be recorded by the class liaison and taken to the

appropriate figure. It should be noteworthy that individual issues should be taken up with the appropriate figure initially, before it is taken up by the class liaison. If that goes unresolved, then it would be appropriate for the liaisons to seek further inquiry. Keep in mind that SOTA is an organization of unified students that has the power to voice its advocations and concerns to a higher body, just as ASD does with American Occupational Therapy Association.

Committee Meetings

After the membership signs up for one or more committees, it is the duty of the respective chairperson to contact the committee members for an outside meeting. At the meeting, each chairperson facilitates the discussion to obtain prioritized objectives for the semester. These objectives are documented along with the action steps and the names of the persons responsible for each step required to achieve the objective.

The documented objective(s) along with its follow-up is taken to the next Executive Board meeting for announcement and submitted to the minutes during the old business portion of the agenda. During the next SOTA Membership meeting, the chairperson reports to the membership about the committee's objective(s) and any other announcements that the committee wishes to convey.

Task Force Meetings

In the event that an activity falls outside of the duties of an Executive Board officer, a task force is formed. This task force is comprised of a contact person (can be a non-Executive Board officer) and a group of students from the membership. The Task Force meeting is lead similarly to a committee meeting. The contact person will be required to attend the Executive Board meeting to relay their objective(s) and possible need for membership and financial assistance.

8

Bylaws

Bylaws are adopted rules that govern and regulate an organization's actions. With the inception of new Executive Board officers each year, it becomes imperative that they adhere to the policies and procedures that have been developed by the organization. This assures transitional consistency that has benefited the organization in past semesters. If the SOTA does not have Bylaws or a Constitution, it is essential that it be formed.

Bylaw content will vary from one SOTA to the next. This chapter will underscore many of the important elements that should be included into a SOTA's bylaws.

Bylaws are typically written in a structured format of articles and sections. The following articles and sections attempt to provide a simple and logical approach to creating or modifying your existing Bylaws.

The best way to conceptualize what a set of Bylaws looks like is to refer to one already established. In writing the bylaws for Seton Hall University back in 1999, I referred to the bylaws written by AOTA in 1976. AOTA's bylaw format was comprehensive and served as a model from which Seton Hall University's bylaws were created.

A SOTA may wish to accept or refute many of the statements that follow. Bylaws need to reflect the needs of the specific organization, and hence, differ from the copy of Seton Hall University's SOTA Bylaws.

SOTA Bylaws of Seton Hall University

[Adopted 7/13/99—Effective 9/1/99]

Article I

Name, Emblems and Publications

Section 1. NAME. The organization shall be called The Student Occupational Therapy Association of Seton Hall University, hereinafter referred to as SOTA or the Association.

Section 2. EMBLEMS. The collective membership emblems of SOTA shall be approved by the Executive Board.

Section 3. PUBLICATIONS. The official publication shall be entitled Seton Hall University's Student Occupational Therapy Association (SOTA) Newsletter.

Section 4. WEBSITE. The name, address, and content of the official website of SOTA shall be determined by the members of SOTA.

Article II

Purpose and Noninurement

Section 1. PURPOSE. The purpose of SOTA is twofold. First, SOTA will increase campus and community awareness of the occupational therapy profession. Second, SOTA will be active on national issues by sending an ASD Delegate representative to the annual AOTA Conference every year.

Section 2. NONINUREMENT. With the purpose of this Association devoted entirely to the advancement of the profession, no part of its earnings shall inure to the use or benefit of any individual.

Article III

MEMBERS

Section 1. MEMBERSHIP CLASSES. The membership of the Association shall consist of two classes:
  A. *Executive Board*. Executive Board members shall be (1) professional phase graduate students of Seton Hall University who shall be referred to as "occupational therapy students" (OTSs) and (2) pre-professional phase undergraduate students of Seton Hall University who shall be referred to as "3+3 OT students"
  B. *Membership*. The Membership shall be (1) OTSs, (2) 3+3 OT students, or (3) any other graduate or undergraduate student currently enrolled at Seton Hall University.

Section 2. QUALIFICATIONS.
  A. *Executive Board*. In order to be eligible for membership, an OTS or 3+3 OT student must be (1) currently registered with the Seton Hall University's Registrar's Department and (2) enrolled as either a pre or professional phase occupational therapy student through the University and School of Graduate Medical Education.
  B. *Membership*. In order to be eligible for membership, a Student Body Member must be enrolled as a fulltime undergraduate or graduate student of Seton Hall University.

Section 3. MEMBERS IN GOOD STANDING
  A. *Executive Board*. An individual, who meets the qualifications for membership in the appropriate classification, has paid the appropriate fee, attends all Executive Board and General SOTA Meetings, and agrees to uphold the standards and ethics of the Association is a member of good standing.
  B. *Membership*. A member who paid the appropriate fee, attends two General SOTA Meetings in both the Fall and Spring semesters, and agrees to uphold the standards and ethics of the Association is a member of good standing.

Section 4. RIGHTS AND PRIVILEGES OF MEMBERS IN GOOD STANDING.
  A. *Executive Board*. All Executive Board Members in good standing have the right to formulate and direct the actions of their respective Board who meet the qualifications in Article V. Executive Board members in good standing have the right to publish articles in the SOTA Newsletter. OTS and/or 3+3 OT students shall be entitled to one vote in the election of the officers of the Association. Executive Board members in good standing shall receive a personal issue of the SOTA Newsletter. Executive Board members in good standing shall be entitled to discounted prices for events and conferences as cited by the Executive Board. Executive Board members in good standing shall have their name printed on the official Seton Hall University SOTA Website.
  B. *Membership*. Members in good standing have the right to join and participate in the actions of one or more respective Committees as specified in Article V. Members in good standing have the right to publish articles in the SOTA Newsletter. OTSs, 3+3 OT students, and/or other matriculated Seton Hall University students shall be entitled to one vote in the election of the officers of the Association. Members in good standing shall receive a personal issue of the SOTA Newsletter upon request. Members in good standing shall be

entitled to discounted prices for events and conferences as cited by the Executive Board.

Article IV

Meetings of the Membership of the Association

Section 1. MEETING TIMES.
  A. *Executive Board.* Executive Board meetings will be scheduled (1) one or two weeks prior to the General SOTA Meeting and (2) at a minimum of three times in the Fall semester, three times in the Spring semester, and at least once in the summer semester.
  B. *SOTA Membership Meetings.* SOTA Membership Meetings will be scheduled (1) one or two weeks after an Executive Board Meeting and (2) at a minimum of two times in the Fall semester, two times in the Spring semester, and at least once in the summer semester.
  C. *Committee and Task Force Meetings.* Committee Meetings specified in Article V and Task Force Meetings must occur at least once during both the Fall and Spring semesters. Meeting times must be relayed to the President or Vice-President with two days notice

Section 2. CALL FOR MEETINGS
  A. *Executive Board.* Executive Board Meetings may be called anytime by the (1) President, (2) Vice-President or (3) two-thirds vote of the Executive Board with three days notice.
  B. *SOTA Membership Meetings.* SOTA Membership Meetings may be called anytime by the (1) President, (2) Vice-President or (3) two-thirds vote by the Student Body with five days notice.
  C. *Committee and Task Force Meetings.* Committee meetings can be called anytime by the (1) Committee Chairperson, (2) President, or (3) Vice-President. Task Force Meetings can created anytime there is a need to focus on a domain that falls outside any of the duties required of the Executive Board. A Task Force Leader will be selected by the Executive Board from the general SOTA membership. Task force meetings can be called anytime by the: (1) Task Force Leader, (2) President, or (3) Vice-President.

Section 3. ATTENDANCE
  A. E*xecutive Board.* Any member of SOTA in good standing may attend an Executive Board Meeting. Attendance is mandatory for all Executive Board members. Absences are excusable only if a representative is on hand with a given statement to report. The acting Secretary will record the attendance.
  B. *General SOTA Meeting.* Attendance is mandatory for all Executive Board members. Absences are excusable only if a representative is on hand with a given statement to report. Student Body members are required to attend all SOTA Meetings in the Fall and Spring semesters. The acting Secretary will record the attendance of all SOTA members.
  C. *Committee and Task Force Meetings.* Attendance is strongly encouraged for all Committee and Task Force members.

Section 4. VOTING. At any meeting, all voting shall be done in person only and each individual in good standing shall have one vote. At any meeting, a chance for discussion followed by a motion to adopt an amendment shall require a majority vote. To overturn a previously existing amendment, a discussion followed by a motion to adopt the new amendment shall require a two-thirds vote. The Executive Board shall determine the process for counting and recording a vote.

Article V

Executive Board Officers

Section 1. OFFICERS. The officers of the Association shall be the President, Vice-President, Secretary, Treasurer, Fundraising Chairperson, Public Relations Chairperson, Community Service Chairperson, Social Activities Chairperson, Historian, Editor of the SOTA Newsletter, ASD Delegate, two Class Liaisons, and the Pre-Professional Class Representative. The Organizational design of the Executive Board is depicted on Figure 2. The Expanded Schematic Role for SOTA is shown on Figure 3.

Section 2. ELECTIONS. Executive Board Officers of the Association shall be elected by individual vote of the Association's voting members in good standing by ballot. In order to ensure continuity of leadership experience, elections of officers will occur in (1) September for first year OTSs and 3+3 OT Student, (2) December for ASD Delegate under conditions of Article V, Section 15 and (3) January for second year OTSs.

Section 3. ELIGIBILITY AND QUALIFICATIONS. In order to be eligible for an Executive Board Office, the member must be in good standing with SOTA as outlined under Article III, Section 3.

Section 4. TERMS OF OFFICE. No officer may serve more than two consecutive terms in the same office. Officers may occupy two Executive Board Offices at once for the ASD Delegate and Editor of the SOTA Newsletter only. The Official Office Duration Pathway for Executive Board Members is depicted on Figure 1.

Section 5. DUTIES. It is the responsibility of each officer to become familiar with all of the SOTA Bylaws (each officer will retain their own personal copy). It is the responsibility of each officer to fully understand their scope and role within SOTA.

Section 6. PRESIDENT. The President of SOTA shall be a second year OTS. Roles include: facilitation of actions of all Executive Board officers; and communication with the Department of Campus Activities, NJOTA Student Representative, NJOTA President, New Jersey State Representative to the Representative Assembly, and the ASD Steering Committee. The President guides and calls for frequency and duration of Executive Board and General SOTA Meetings.

Section 7. VICE-PRESIDENT. The Vice-President shall be a first year OTS. Roles include: collaboration with the President, assisting in the supervision and facilitation of actions set forth by the Executive Board, and communication with both Class Mediators. The Vice-President may guide and call for frequency and duration of Executive Board and General SOTA Meetings while in collaboration with the President. The Vice-President will resume all roles of the President at events in which the President is unable to attend.

Section 8. SECRETARY. The Secretary shall be a first year OTS. Roles include: recording of minutes given at the Executive Board and General Student Body Meetings, coordinating location and timing of meetings with the Department of Campus Activities, distribution of SOTA announcements, and communication with the Pre-Professional Student Representative as needed.

Section 9. TREASURER. The Treasurer shall be a first year OTS. Duties include: maintaining financial records, collection and depositing of acquired funds into the SOTA account at Seton Hall University. Additional duties are outlined in Article X.

Section 10. FUNDRAISING CHAIRPERSON. The Fundraising Chairperson shall be a second year OTS. Duties include: formulation and facilitation of a Fundraising Committee that will (1) plan and conduct fundraising events within the rules and regulations of the Department of Campus Activities, and (2) store and maintain inventory of all fundraising resources.

Section 11. PUBLIC RELATIONS CHAIRPERSON. The Public Relations Chairperson shall be a second year OTS. Duties include: formulation and facilitation of a Public Relations Committee that will plan and coordinate occupational therapy promotion on campus and community (especially during OT Month in April through workshops during the school year), school newspaper, and WSOU (school radio station). It will also be the responsibility of this Committee to update the official SOTA Website as needed.

Section 12. COMMUNITY SERVICE CHAIRPERSON. The Community Service Chairperson shall be a first year OTS. Duties include: formulation and facilitation of a Community Service Committee that will organize and promote SOTA volunteer involvement on campus and in the community.

Section 13. SOCIAL ACTIVITIES CHAIRPERSON. The Social Activities Chairperson shall be a second year OTS. Duties include: formulation and facilitation of a Social Activities Committee that will organize formal and informal social events to increase inter-class socialization. This Chairperson will be responsible for directing and overseeing the Student Mentor-Mentee Program and scheduling the Annual spring Formal as per Article IX, Section 2.

Section 14. HISTORIAN. The Historian shall be a first year OTS. Duties include: formulation and facilitation of a Historian Committee that will maintain a photoalbum of all members, as per Article IX, Section 3; conduct projects for historical records; and maintain an up-to-date bulletin board.

Section 15. ASD DELEGATE. The ASD Delegate shall always be a first year OTS. This officer will be elected by the first year OTSs in early December. Duties include: polling all SOTA members prior to the annual AOTA Conference about their advocations and concerns about current issues and proposed Resolutions, attend all Delegate Meetings, join a Task Force and fulfill these responsibilities throughout the year, and relay all pertinent information gathered from Conference to all members of SOTA via Delegate Address. It is the responsibility of the ASD Delegate to confer with last year's ASD Delegate about expectations and further responsibilities. Funding is discussed in Article IX, Section 1.

Section 16. ALTERNATE ASD DELEGATE. This is not an Executive Board position. The Alternate ASD Delegate shall be a first year OTS. This office will be given to the OTS who receives the second most votes in the ASD Delegate Election. Duties include: resuming all roles of ASD Delegate if the original ASD Delegate is unable to attend. The office will expire once the ASD Delegate attends Conference.

Section 17. CLASS LIAISON. There shall be two Class Liaisons that are elected in the first and second years. Duties include: communication and collaboration between the other liaison and acts as a intermediary between membership and faculty/administration of both the Occupational Therapy Program and the School of Graduate Medical Education. Each Liaison will communicate with the SOTA Advisor before each SOTA Membership Meeting to convey any information or announcements to their respective class. Liaisons will also communicate with the Vice-President when issues arise.

Section 18. EDITOR of the SOTA NEWSLETTER. The Editor of the SOTA Newsletter shall be a second year OTS. Duties include: formulation of a SOTA Newsletter

team as needed; gathering monthly reports from the President, and all Committee and Task Force Groups; and composing a minimum of two Newsletters per each Fall and Spring semester.

Section 19. PRE-PROFESSIONAL CLASS REPRESENTATIVE. The Pre-Professional Class Representative shall be a 3+3 OT Student. Duties include: serves as a liaison between the 3+3 students and the OTSs, disseminates information to all 3+3 students when needed, and communicates with the Secretary as needed.

Article VI

Nominations and Elections

Section 1. ELECTIONS. Elections of the Executive Board Officers shall be by a majority vote received from SOTA members in good standing. Unless otherwise stated, voting shall be conducted through individual ballots.

Section 2. TIMING OF ELECTIONS. To ensure continuity of Executive Board offices, there will be two times for elections to ensue.
   A. *Second Year Elections.* All second year OTS Executive Board elections will occur within three weeks within the onset of classes in the Spring semester. This includes the inductance of the: President, Public Relations chairperson, Fundraising Chairperson, Social Activities Chairperson, Editor of the SOTA Newsletter, and the Class Liaison (2nd year)..
   B. *First Year Elections.* All first year OTS Executive Board elections will occur within four weeks within the onset of the Fall semester. This includes the inductance of the Vice-President, Secretary, Treasurer, Community Service Chairperson, Historian, and the Class Liaison (1st year).
   C. *Pre-Professional OTS Nomination.* The Pre-Professional Class Representative Nomination shall occur during the Fall semester.
   D. *ASD Delegate Election.* The ASD Election shall occur in early December by the first year OTS class. The class will hold a election under the guidelines of Article VI, Section 3 and 4.

Section 3. RUNNING FOR OFFICE. Any SOTA member in good standing can run for an office of their specified class year as specified under Article V. Within a time period determined by the Executive Board, SOTA members are asked to run for a given office. A list of students is then compiled for each office.

Section 4. BALLOT.

   A. *Preparation.* An elected member of the Executive Board will prepare a ballot with the names of those who wish to run for office.
   B. *Nominations.* In the event that no SOTA member runs for an office needed for their respective class, a motion for nomination occurs. For five minutes, SOTA members are encouraged to nominate an individual or a number of individuals within good standing that they feel would best suit the office. In order for a motion of inductance to occur, the chosen SOTA member(s) must accept the nomination for office. If more than one individual accepts the nomination, blank ballots with the name of the officer are submitted and counted. The member with the most votes will be inducted into office.
   C. *Opportunity for Self-Promotion.* Before ballots are distributed to the voting SOTA members, each candidate will be given a one to two minute opportunity for self-promotion via speech as to why they feel they would be an ideal candidate.
   D. *Voting for Candidate.* Each SOTA member will vote for one candidate, except the President, who will not vote as per Article VI, Section 4, Part E.
   E. *Tie Vote.* In the event of a tie vote, the ballots shall be recounted. If the results are still tied, the President will make the determination as to who receives the office.

Section 5. ANNOUNCEMENT. The results of the election shall be announced by the acting President at the conclusion of the Meeting. The ballots will be retained by the Secretary until the end of the meeting, after which time shall be destroyed. All candidates' names will be posted on the OT Bulletin Board and published in the SOTA Newsletter.

Article VII

SOTA Manual

Section 1. LOCATION. The SOTA Manual must be placed in an area where each member can have access to it. This is to be determined by the Executive Board. Its existence and contents must be announced once each semester.
Section 2. CONTENTS. The SOTA Manual will include at least all of the following: a photograph and membership listing of all those on the Executive Board for that year, a copy of the SOTA Bylaws, NJOTA and AOTA membership applications, all editions of the SOTA Newsletter, the most recent Reference Handbook for ASD Delegates, and both the pre and post Conference mailers for the AOTA Conference attended.

Section 3. EDITIONS. Additional binders may be needed for future reference. Hence, a series of SOTA Manuals will be formulated.

Article VIII

Membership of Other Professional Associations

Section 1. AMERICAN OCCUPATIONAL THERAPY ASSOCIATION. The SOTA membership will strive to achieve a high percentage of student membership to the American Occupational Therapy Association, hereinafter referred to as the AOTA. Applications for membership will be distributed on the first Spring General SOTA Meeting. SOTA members having AOTA membership will be highly encouraged to attend each year's Annual AOTA Conference.

Section 2. NEW JERSEY OCCUPATIONAL THERAPY ASSOCIATION. The SOTA membership will strive to achieve a high percentage of student membership to the New Jersey Occupational Therapy Association, hereinafter referred to as the NJOTA. Applications for membership will be distributed at the first Fall General SOTA Meeting. SOTA members having NJOTA membership will be highly encouraged to attend each year's Annual NJOTA Conference.

Article IX

Specialty Sections

Section 1. FUNDING FOR ASD DELEGATES. It is the responsibility of the ASD Delegate to apply and receive the $250.00 stipend offered through the School of Graduate Medical Education. It is the responsibility of the Executive Board to attempt to raise enough funds to support a five-night stay for the ASD Delegate and all other SOTA members attending the Annual AOTA Conference.

Section 2. ANNUAL SOTA FORMAL. There is to be an Annual SOTA Formal each Spring semester. The location, timing, and cost of the event is to be determined by both the Executive and Social Activities Board. The Formal is designed to celebrate the impendent graduation of each third year OTS Class.

Section 3. HISTORIAN PHOTO ALBUM. The Historian Photo album will be maintained each year. The location and contents will be determined by the Historian Committee. Albums must be made available for interclass viewing purposes.

Section 4. SOTA BYLAWS. The SOTA Bylaws shall be distributed to each Executive Board member at the First Executive Board Meeting of the Spring and Fall semesters and open for questions at the Second Executive Board Meeting for that semester. Each Executive Board member is to retain their own personal copy. A copy of the SOTA Bylaws may be placed for public display on the SOTA Bulletin Board for the Membership to read for a period of time determined by the Executive Board.

Article X

Annual Budget

Section 1. ROLE OF THE TREASURER. In addition to Article V, Section 9, the Treasurer will: distribute an updated SOTA Budget Report to all Executive Board Members at each Executive Board Meeting, collaborate with Executive Board members and the Student Government Association to acquire all "Anticipated Funds" of income, and distribute copies of the updated SOTA Budget Report to the Newsletter Editor for the mailing to all OTSs in good standing who are on fieldwork or have graduated.

Section 2. ALLOCATION OF FUNDS. Each school year, the Executive Board will form an annual SOTA Budget Report. Requiring a two-thirds vote, the Executive Board may: transfer a previously quoted budget amount for any given category to another category; and allocate additional funds required of an event or activity that surpasses its original budget amount.

Section 3. UTILIZATION OF FUNDS. Executive Board members may withdraw funds from their established budget at anytime without collaboration of the Executive Board. The Executive Board member must report to the Treasurer as to what the funds were used for and submit receipts for all purchases.

SOTA Bylaws were originally written by Thomas J. Mernar, 1998-1999 SOTA President, 1998 ASCOTA Delegate, and 1997-1998 Treasurer.

The Budget

Every SOTA should formulate its own budget. A key factor influencing the success or failure of a SOTA is its ability to financially support its members and events. The budget is a spreadsheet of financial figures that depicts where money is raised and spent accordingly. Three main categories should be included in your budget: income, expenses, and account balance.

There are three primary methods of gathering income for the organization. First, there should be at least one major fundraising effort each semester. Second, annual member dues need to be collected from all members. Third, funds may be available from outside sources such as a school's Student Government Association and occupational therapy/assistant program department,

Conversely, the organization's expenses will vary depending on the size and financial needs of the organization. Budgets generally included fixed amounts of income that are designated for particular officers and events. A sample budget is given in Figure 8.1. The figures selected in each category are not meant to serve for standard purposes. An example of how funds are allocated and utilized is given in Chapter 7 under Article X of the SOTA Bylaws.

Date: _____

SOTA Annual Budget
9/1/99 through 8/31/00

INCOME

	Anticipated	Actual
Previous Balance	900	900
SGA Annual Allotment	200	200
Membership fees	770	510
Fundraising	600	350
Occupational Therapy Department	250	
SGA Conference Allotment	400	
TOTAL INCOME	3,120	1,960

EXPENSES

Category Description	Budget	Actual to Date
Communication:		
101 Newsletter	20	20
102 Webpage	20	20
Charity:		
201 Weddings/Funerals	250	200
202 Community	*contingency basis*	
Chairpersons:		
301 Fundraising	30	30
302 Community Service	20	20
303 Public Relations	20	20
305 Social Activities	60	30
306 Historian	40	20
Leadership:		
401 President	20	20
402 Vice-President	10	10
403 Secretary	10	10
404 Student Liaison	0	0
405 Pre-Prof. Student	0	0

AOTA Conference:

	Budget	Actual to Date
501 ASD Delegate	100	100
502 Student Pool	300	300
503 Hotel	600	600

	Budget	Actual to Date
TOTAL EXPENSES	1,500	1,400
TOTAL ACTUAL INCOME		1,960
CURRENT BALANCE		460

_____

SOTA Treasurer

Implementing Change

Implementing organizational change takes time and effort. Before organizational transformation can commence, the problems that are impeding the progression of a SOTA need to be identified. Whatever problems exist, they need to be acknowledged and confronted. Change serves to disrupt the continuous cycle of organizational flaws that have hindered and will continue to hinder the growth of an organization. If these challenges are not met now, then when will these changes be made?

Implementing any change to your organization is the responsibility of the Executive Board. The Executive Board should identify and gather what problems exist. Once the problems are identified, solutions need to be offered and then executed. Figure 8.1 discusses some of these problems and the solutions that are recommended.

[Figure 8.1]   Problem and Recommended Solutions

<u>Problem</u>   <u>Solution and Chapter</u>

Decreased membership meeting attendance.............Utilize effective communication (6)
Increased confusion about meeting/event times.......Utilize effective communication (6)
Decreased membership involvement in activities....Change organizational design (4)
Decreased rules and regulations..............................Create Bylaws (8)
Executive Board performs all the work....................Change organizational design (4)
Meetings are unstructured.......................................Adhere to agenda and Robert's Rules (7)
Ill-advised spending of funds..................................Create or Modify your budget (8)
Can't raise enough money.......................................Fundraise and utilize external sources (8)
One class is more involved than the other...............Create a balanced representation
                                                                                   of all classes on the Executive Board (2)

11

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