The Development of an Advisers' Handbook for FBLA and PBL Chapters in Utah

Diane K. Linn
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THE DEVELOPMENT OF AN ADVISERS' HANDBOOK FOR
FBLA AND PBL CHAPTERS IN UTAH

by

Diane K. Linn

A Plan B report submitted in partial fulfillment
of the requirements for the degree
of
MASTER OF SCIENCE
in
Business Education

Approved:

UTAH STATE UNIVERSITY
Logan, Utah
1975
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I would like to express my love and thanks to my mother, LaVonne Linn, for her support and encouragement this year.

Finally, I wish to thank a special friend, Ron Monson, for his support in proofreading this paper and for the patience and understanding offered in completing the work.
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CHAPTER I

INTRODUCTION

The Future Business Leaders of America (FBLA) and Phi Beta Lambda (PBL) organizations serve the business youth of today—the business leaders of tomorrow. These organizations, founded by Hamden L. Forkner, have been in existence since 1942. The first FBLA chapter was chartered at Johnson City, Tennessee; and the first PBL chapter was chartered at Iowa State Teachers College, Cedar Falls, (now the University of Northern Iowa). ¹

Chapter growth has been rapid with the latest figures showing 4,587 FBLA chapters and 461 PBL chapters now in existence in 44 states and 3 territories. ²

The Utah state chapter of FBLA and PBL was chartered in 1971; there are now 34 FBLA and 8 PBL local chapters in Utah. ³ Because of the rapid growth in Utah, as well as in other states, the need exists for an organized set of guidelines by which local chapters can function and toward which advisers may refer for advice and suggestions for chapter operations. It is this need with which the following study will deal. As a result of this study, a handbook will be developed that will be unique for Utah FBLA and PBL chapters.


³ Utah Chapter FBLA and PBL Directory (Utah State Board of Education, 1974-75).
Purpose of the Study

The purpose of this study is to develop a handbook for the Future Business Leaders of America (FBLA) and Phi Beta Lambda (PBL) chapter advisers in Utah to use as a guideline for chapter operations.

More specifically, the study and resulting handbook will answer the following questions:

1. How are the existing FBLA and PBL chapters organized in terms of (a) membership requirements, (b) attendance at local meetings, (c) co- or extra-curricular meetings, (d) number of meetings per year, (e) local dues, (f) local officers and standing committees used, (g) programs at regular meetings, (h) honors to outstanding members?

2. In what ways do the existing chapters participate in (a) fund-raising projects, (b) school service projects, (c) community service projects?

3. In what ways do the existing chapters participate at the local, state, regional, and national levels in (a) conferences/meetings, (b) events (contests), (c) election campaigns, (d) publications?

4. Do the existing chapters promote the local chapter in the school and in the community?

5. How are chapter members' expenses paid when attending conferences?

6. How are advisers' expenses paid when attending conferences?

7. Is the chapter adviser paid for advising the local chapter?

8. Is the chapter adviser given a reduced teaching load?

9. How much time do the advisers spend on chapter-related activities each month?
10. What are the recommendations of the FBLA and PBL advisers in Utah to those interested in formulating a new chapter or to improve an existing chapter?

11. What items would the advisers in Utah like to see included in an FBLA and PBL handbook?

**Importance of the Study**

FBLA and PBL chapters, like those of many other organizations, may experience difficulties in building and maintaining a strong foundation for meeting the objectives of the organization. Without a stable set of guidelines to follow, the members and advisers can begin to lose sight of the value of the organization, and all too often become inactive.

There are several ways to strengthen the existing organization, as well as to encourage the formation of new ones. One of these ways is to develop a practical set of guidelines, tips, and suggestions in the form of a state handbook. Mr. Gary Lloyd, state specialist in Business Education and State Chairman for FBLA and PBL for Utah believes:

... there is a need to develop a handbook for advisers to coordinate activities at the local level and also to promote interest in forming new chapters in the state. A handbook of this type might include guidelines for contests held at the state level, information concerning regional and national conferences and the fall leadership conference, and how to charter new chapters in Utah. It should supplement the national handbook.4

The *National Handbook*, available from the national office to all local chapters, serves as a vital source of information. More specific

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suggestions, however, can be gained by the local adviser and chapter members from a thorough study and report of activities in each state. Nagle reports in her conclusions and recommendations of her thesis that:

... the state office should continue to assist chapters and prospective chapters in planning worthwhile programs for the members. One help would be to have a listing of suggested guidelines of activities which have been successful in the past. 5

Several states have developed handbooks of this nature. The current Pennsylvania handbook expresses in the preface that the main purpose of such a guide is:

... to provide local chapters with guidelines relative to the operation of the Future Business Leaders of America on the state and local levels, ... used to the end that obligations will be promptly met and easily discharged. 6

Likewise, the Colorado state chapter felt the need for such a handbook to "... suggest teaching facility that will supplement, vitalize, and motivate the learning experiences ... that FBLA activity can be designed to give ... ." 7

From the above statements, one can see that there is a definite need to develop a useful set of guidelines for the operation of the Future Business Leaders of America and Phi Beta Lambda organizations of Utah.


Methods and Procedures

During October 1974, letters were sent to each of the 47 states and territories which have chartered FBLA and/or PBL chapters. Addressed to the state chairperson, the letters requested copies of their state handbook and any other information which might prove helpful in developing the handbook for Utah. (Appendix A) This mailing was sent under the direction of Gary M. Lloyd, Utah state FBLA and PBL chairman.

Handbooks were received from 35 states, and the information contained in them was used in formulating the questionnaire and in organizing the final handbook.

In addition, a letter was sent to Mr. Edward D. Miller, Executive Director for FBLA and PBL, requesting a copy of the national handbook.

Selection of survey participants

Names and addresses of the FBLA and PBL chapter advisers were obtained from Mr. Gary M. Lloyd, state chairman for the Utah organizations. The total number of FBLA advisers is 34, and the PBL advisers total 8.

Preparation of the questionnaire

A combination fact finding-opinion questionnaire was developed to gather data concerning the operations of the local FBLA and PBL chapters in Utah and was sent to all advisers in the state. Each adviser was sent an identical questionnaire.

The major topics for the questionnaire were first outlined. Research on this topic was studied for possible areas of concern. The state chairman, Mr. Gary M. Lloyd, and the Executive Board of FBLA and PBL in Utah were also contacted for additions to the questionnaire.
The draft of the questionnaire was submitted to the investigator's
ggraduate committee for approval before being tested by local advisers.
Two advisers were asked to test the questionnaire for content and ease of
understanding. Final changes were made in the questionnaire before ad-
ministering to all FBLA and PBL advisers in Utah.

Method of administering

An identical questionnaire was mailed to the 34 FBLA and 8 PBL
chapter advisers in Utah on May 12, 1975. (Appendix B) A cover letter
and a self-addressed, stamped return envelope were enclosed with the two-
page questionnaire. (Appendix C)

School names were typed on each questionnaire to aid in the follow-
up procedures. It is believed to have a representative sample of the
advisers in Utah, at least an 85 percent return of each group is
essential.

By May 23, 31 questionnaires or a total of 76 percent had been
returned. Telephone calls were made to advisers who had not returned
the questionnaire. By June 4, 28 FBLA and 7 PBL questionnaires or a
total of 85 percent had been returned.

Treatment of the data

The questionnaires were separated according to which youth organi-
zation was designated. The answers were tallied, and a handbook for Utah
PBL and FBLA advisers was developed as a result of the data collected.

Scope of the Study

The resulting handbook is valid for use in Utah by local FBLA and
PBL advisers and is not necessarily applicable to other state chapters.
The results of the study are valid only to the extent that the respondents are accurate and truthful in answering the questions.

It is assumed that the local FBLA and PBL advisers are in the best positions to supply information relative to chapter activities through the questionnaire for this study.

Definitions

Future Business Leaders of America (FBLA)--the Future Business Leaders of America is the national youth organization for business students at the high school level. The national headquarters are in Washington, D.C. Among the purposes are to:

1. Develop competent, aggressive business leadership.
2. Strengthen the confidence of young men and women in themselves and their work.
3. Create more interest and understanding in the intelligent choice of business occupations.
4. Encourage young men and women in the development of individual projects and in establishing themselves in business.
5. Encourage young persons to improve the home and community.
6. Participate in worthy undertakings for the improvement of business and the community.
7. Develop character, prepare for useful citizenship, and foster patriotism.
8. Participate in cooperative effort.
10. Encourage improvement in scholarship and promote school loyalty.
11. Improve and establish standards for entrance into business occupations.  

Phi Beta Lambda (PBL) -- Phi Beta Lambda is the collegiate counterpart to the Future Business Leaders of America and is organized for students interested in a business-related career. Its purposes are the same as those of FBLA.

State handbook -- the state handbook is to serve as a guide for local chapter activities and includes activities, suggestions for improvements in operations, and contains other helpful information not found in the national handbook.

Chapter adviser -- the chapter adviser is the person responsible for guiding and directing the officers in planning and carrying out their duties for the respective chapter.

Events (contests) -- events are defined as organized activities in which chapter members participate to earn awards. Events are sponsored at the state and national levels.

Local chapter -- (a) the local FBLA chapter consists of high school students enrolled in business programs and organized in accordance with the Constitution and By-Laws of FBLA-PBL, Inc. Each chapter has officers, working committees, and one or more advisers. (b) The local PBL chapter is organized under the same general principles as the secondary school chapter. Charters for operating chapters in junior colleges, senior colleges, universities, vocational-technical schools, and private business schools are granted.

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8 National Handbook, p. 1.4
9 Ibid., p. 2.1
State chapter—the state chapter consists of the local FBLA-PBL chapters within that state. Delegates representing local chapters meet at least once a year to transact the business of the state chapter, to review the work of the organization, and to conduct the state leadership conference.10

State chairman—the FBLA-PBL state chairman is appointed by the national organization. Some of his responsibilities include:

1. Serves as liaison between national association and state FBLA-PBL board of directors.

2. Serves as official representative of the state FBLA-PBL board of directors to the national association.

3. Is responsible for bringing matters relative to the operation of the state chapter to the national executive director and the national FBLA-PBL Board of Directors.

4. Is responsible for filing informational reports to the national office relative to internal revenue affairs.

5. Is responsible for filing state FBLA-PBL chapter reports to the national office including budgeting and financial reports, membership, projects, and activities.

6. Is authorized to appoint state advisers to FBLA-PBL student divisions.11

10 Ibid., p. 2.2
11 Ibid.
CHAPTER II
REVIEW OF LITERATURE

Introduction

Student organizations have contributed greatly to the total learning process. Ralph E. Bender states that:

... one of the most significant contributions in vocational education has been the development of youth organizations. They have made vocational education more attractive to students and have served well in promoting learning.12

The purpose of this chapter is to present a review of the literature relating to the development of a handbook for Utah FBLA and PBL chapters. Discussion will be divided into four major areas: (1) Background information of handbooks; (2) How to write a handbook; (3) Business youth organization handbooks; and (4) Purposes of handbooks for FBLA and PBL.

Background Information of Handbooks

Handbooks exist for nearly every type of organization. They serve as a set of guidelines, answer common questions, and give rules and regulations of the specific organization for all members to follow.

One type of handbook is a student handbook developed for use in high schools for new students. A survey of high school principals was conducted at Michigan State University to determine the worth and use of student handbooks in the schools. Many principals responded that they give school rules and regulations and are used primarily to orient new students.

students to the school. The conclusion was also drawn that there is a "trend toward informality, livelier style, eye appeal, and a friendly tone."\(^{13}\)

In his discussion of communication between the employer and employee, Sigband suggests the use of a handbook because: "... no longer can the employee sit down with the 'boss' and learn in a few minutes what he may expect from the company and what the company may expect from him."\(^{14}\)

Handbooks are used by schools, businesses, and youth organizations and are relied upon to give useful information.

How to Write a Handbook

The writing of a handbook is similar to other report writing, and a writer may draw from the suggestions and trends given when developing an effective handbook.

Wolf and Aurner suggest two major trends in report writing: (1) informalizing trend, using a conversational tone and easy to understand; and (2) visualization trend, expressing data by using pictures, charts, tables, or drawings.\(^{15}\)

When discussing a correct writing style for a handbook, Sigband suggests that "the writing style should be friendly and natural, not


commanding or dictatorial." Further, "the handbook not only attempts to inform ... but it also tries to build ... pride." 

Sigband gives several specific suggestions for the development of a handbook including:

... the physical makeup of the handbook is most important. It should be small, neat, and appealing in its appearance. The cover should be hard and the title clearly printed on it. ... the handbook should make liberal use of color and reflect care and thought in planning and layout.

William H. Bonner agrees that in all writing, it is important to write in a conversational tone. Included in this type of writing are the use of personal pronouns, contractions, idiomatic expressions, personal references, contemporary references, and correct word choice for the reader.

Business Youth Organization Handbooks

Other youth organizations in the field of business have adopted handbooks to serve the local chapter members and advisers and to serve as a guide to chapter activities.

The Utah chapters of Vocational Industrial Clubs of America (VICA) have a handbook with the following general purpose as stated to chapter advisers: "In this guide we have attempted to supply you with all the 'extra' material that you will need to have a well-organized, functioning club."

16 Sigband, p. 381.
17 Sigband, p. 382.
18 Sigband, p. 381.
Included in the VICA handbook are information about the Utah clubs; information about the club symbolism, goals and officer duties; and programs and suggested activities.\textsuperscript{21}

The national office of the Distributive Education Clubs of America (DECA) has distributed its handbook to local chapters with its purposes:

--to identify the educational advantages of DECA chapter activities;
--to suggest procedures for local chapter improvement and development;
--to aid the DECA chapter function of supplementing Distributive Education programs.\textsuperscript{22}

\textbf{Purposes of Handbooks for FBLA and PBL}

Like high schools, businesses, and other organizations, the FBLA and PBL chapters need a set of guidelines to follow. Many states that have developed such guidelines were helpful in supplying handbooks to aid in the project for Utah. Following are some of the reasons given for these states developing a handbook for FBLA and/or PBL.

Richard F. Reicherter, FBLA State Chairman for Kansas, writes in the preface of the Kansas Handbook: "This guide is presented, as a composite of local and state materials, to each local Kansas Chapter of the Future Business Leaders of America."\textsuperscript{23} He directs further comments to those advisers, officers, and chapter members who will use the Kansas Handbook.

... Our purpose has been to develop a Handbook that will bring to you ideas and services practical enough for immediate application

\textsuperscript{21}VICA Handbook, Contents.
in your local chapter, challenging enough to cause you to project your thinking on the problems of FBLA in the future, and stimulating enough to provide definite use toward finding a solution for these problems.24

To meet these objectives, the Kansas Handbook includes the following topics: a yearly calendar, purposes of FBLA, FBLA creed, code of ethics, pledge, Kansas constitution and by-laws, organization of local clubs in the state, suggested chapter projects, and duties and responsibilities of the chapter officers.25

The Kentucky State Handbook for Phi Beta Lambda offers these purposes for its use:

The Phi Beta Lambda Kentucky State Handbook has been prepared primarily for chapter members and advisers to use as a convenient source for facts about the organization's operations and facilities. It can also be used by business students and teachers who are interested in organizing chapters of FBL at their respective schools.26

Under the direction of Finch and Melvin, the Mississippi State Handbook was developed to "be a guide for local FBLA chapter advisers to assist them in providing quality educational experiences through FBLA programs of youth activity."27

The Mississippi FBLA Handbook has also included ideas and tips for preparing for the various contests and rules and regulations for the local chapters.

Emphasizing the duties of officers and members, Toby D. Jalowsky, state chairperson for Arizona FBLA, states in the preface:

24 Ibid.
25 Ibid., Contents.
26 Kentucky State Handbook for FBL, no publication date, Preface.
27 Dr. Alton V. Finch and Mrs. Opal B. Melvin, Mississippi State Handbook for Future Business Leaders of America, 1974, Preface.
Its primary purpose is to outline the various duties normally delegated to each chapter officer so that new officers can become knowledgeable of their responsibilities to the chapter while in office.

Each member of the chapter should also be familiar with the duties of all the chapter officers as well as with the member's own responsibility to the chapter.\(^{28}\)

To meet the purpose of an active organization of knowledgeable members and officers, the Arizona Handbook includes a history of FBLA, purposes, FBLA pledge, creed, and code of ethics, dues, Arizona constitution and by-laws, adviser responsibilities, officers' duties, chapter meetings and activities, publicity, and fund-raising suggestions.\(^{29}\)


\(^{29}\) Ibid., Contents.
CHAPTER III
QUESTIONNAIRE FINDINGS

The purpose of this chapter is to report the findings of the questionnaire administered to the Utah FBLA and PBL advisers. The majority of the findings are presented in tabular form with an accompanying narrative.

Questionnaire Replies

A total of 35 of the 42 questionnaires or 85 percent were returned. Of the 34 questionnaires sent to the FBLA advisers, 28 were returned for an 82 percent response. Of the 8 questionnaires sent to the PBL advisers, 7 were returned for an 87 percent response.

Membership Requirements for Existing Chapters

Table 1 shows the membership qualifications for both FBLA and PBL chapters. Eighty-one percent of the high school chapters and 71 percent of the college chapters require the members to be enrolled in or have taken a business course. Courses mentioned by the advisers ranged from a block office education course to any business course of the student's choosing.

Attendance at Local Meetings

Of the 28 FBLA advisers reporting attendance at regular meetings, the most frequent response was in the 60 to 80 percent category. As shown in Table 2, this category received 36 percent of the total number of responses. Of the 7 PBL advisers reporting attendance at regular meetings, the most frequent response was in the 40 to 60 percent category, which received 57 percent of the total number of responses.
TABLE 1
QUALIFICATIONS FOR MEMBERSHIP

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA Responses</th>
<th>Percent</th>
<th>PBL Responses</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Grade Point Average</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Year in School</td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Enrollment in Courses</td>
<td>23</td>
<td>81</td>
<td>5</td>
<td>71</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>7</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td>28</td>
<td>100</td>
<td>8</td>
<td>100</td>
</tr>
</tbody>
</table>

*One Adviser responded twice.

TABLE 2
PERCENTAGE OF TOTAL MEMBERSHIP ATTENDING EACH MEETING

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA Responses</th>
<th>Percent</th>
<th>PBL Responses</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 20 Percent</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>20 to 60 Percent</td>
<td>2</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40 to 60 Percent</td>
<td>7</td>
<td>24</td>
<td>4</td>
<td>58</td>
</tr>
<tr>
<td>60 to 80 Percent</td>
<td>10</td>
<td>36</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>80 to 100 Percent</td>
<td>8</td>
<td>29</td>
<td>1</td>
<td>14</td>
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<tr>
<td><strong>TOTALS</strong></td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
</tbody>
</table>
Co- or Extra-Curricular Meetings

Table 3 indicates that both FBLA and PBL chapters in Utah have widely varied schedules for meeting. Advisers were given an opportunity to comment on the meeting days and times; their suggestions were also varied and included meeting during the lunch period, evenings after 6:30 p.m. and on Saturday morning.

| TABLE 3 |
| REGULARLY SCHEDULED MEETINGS |

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th>PBL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percent</td>
</tr>
<tr>
<td>During School Activity Hour</td>
<td>4</td>
<td>14</td>
</tr>
<tr>
<td>During Scheduled Class</td>
<td>10</td>
<td>36</td>
</tr>
<tr>
<td>After School</td>
<td>4</td>
<td>14</td>
</tr>
<tr>
<td>Other</td>
<td>10</td>
<td>36</td>
</tr>
<tr>
<td>TOTALS</td>
<td>28</td>
<td>100</td>
</tr>
</tbody>
</table>

Frequency of Meetings Per Year

Table 4 indicates the frequency of the local chapter meetings during the school year. Fourteen of the FBLA advisers (50 percent) and 4 of the PBL advisers (57 percent) reported the use of bi-monthly meetings. Monthly meetings were held by 11 FBLA chapters (39 percent).

Three FBLA chapter advisers answered that meetings are not regularly scheduled throughout the year but are held when necessary to transact business.
TABLE 4
FREQUENCY OF REGULAR MEETINGS

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA Responses</th>
<th>Percent</th>
<th>PBL Responses</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Bi-Monthly</td>
<td>14</td>
<td>50</td>
<td>4</td>
<td>57</td>
</tr>
<tr>
<td>Monthly</td>
<td>11</td>
<td>39</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>11</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>TOTALS</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
</tbody>
</table>

Amount of Local Dues

Each of the 7 PBL advisers reported that local dues were charged. The amount of dues varied with each chapter, with $1 per quarter (2 responses) and 50 cents per quarter (2 responses) being the most frequently reported. Five FBLA chapters do not collect local dues; twenty-three chapters collect yearly dues ranging from 50 cents to $3.50. The most frequently reported amounts were $1 per year (9 responses) and 50 cents per year (6 responses).

Officers and Standing Committees

As reported in Table 5, 100 percent of the PBL chapters elect a president, vice-president, secretary, treasurer, and historian. Twenty-eight FBLA chapter advisers (100 percent) reported electing a president and vice-president; the secretary is elected by 27 FBLA
chapters (96 percent); and a treasurer and reporter are elected by 20 FBLA chapters (71 percent). One FBLA chapter combines the office of secretary-treasurer.

Those chapters electing committee chairmen most frequently use fundraising, social, program, and service. Other committee chairmen elected include finance, auditing, publication, newsletter, hospitality, special projects, public relations, and evaluation.

**TABLE 5**

OFFICERS AND STANDING COMMITTEE CHAIRMEN ELECTED

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA Responses*</th>
<th>Percent</th>
<th>PBL Responses*</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Vice-President</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Secretary</td>
<td>27</td>
<td>96</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Treasurer</td>
<td>20</td>
<td>71</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Parliamentarian</td>
<td>11</td>
<td>39</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Historian</td>
<td>20</td>
<td>71</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Reporter</td>
<td>16</td>
<td>57</td>
<td>6</td>
<td>86</td>
</tr>
<tr>
<td>Committee Chairmen</td>
<td>7</td>
<td>25</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Other</td>
<td>1</td>
<td>4</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

**Programs at Regular Meetings**

Table 6 shows that twenty-eight FBLA (100 percent) and seven PBL (100 percent) chapters conduct business meetings as a part of the regular
meetings. Speakers are used frequently by the FBLA chapters, as reported by 20 chapters (71 percent).

Other programs mentioned by FBLA advisers include socials, field trips, and business demonstrations.

TABLE 6

TYPES OF PROGRAMS AT REGULAR MEETINGS

<table>
<thead>
<tr>
<th></th>
<th>FBLA Responses*</th>
<th>Percent</th>
<th>PBL Responses*</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Meeting</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Films</td>
<td>3</td>
<td>11</td>
<td>3</td>
<td>43</td>
</tr>
<tr>
<td>Speakers</td>
<td>20</td>
<td>71</td>
<td>7</td>
<td>100</td>
</tr>
<tr>
<td>Skits</td>
<td>3</td>
<td>11</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>25</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Year-End Activities

Table 7 shows that 18 (64 percent) of the FBLA chapters and 4 (57 percent) of the PBL chapters do not hold a year-end activity. Those reporting a year-end activity specified the following functions of the banquet or party: installation of new officers, guest speakers, outstanding members honored, advisory board members introduced, and business department achievement certificates given.
TABLE 7
YEAR-END BANQUET

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th></th>
<th>PBL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percent</td>
<td>Responses</td>
<td>Percent</td>
</tr>
<tr>
<td>Yes</td>
<td>10</td>
<td>36</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>No</td>
<td>18</td>
<td>64</td>
<td>4</td>
<td>57</td>
</tr>
<tr>
<td>No Response</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>TOTALS</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
</tbody>
</table>

Fundraising Projects

Of the 28 FBLA advisers responding, Table 8 reports that bake sales were the most frequently used fundraising activity. Fourteen chapters (50 percent) hold bake sales during the year. Stationery and greeting cards were sold by 8 chapters or 29 percent.

Of the 7 PBL advisers responding in Table 8, 5 of the 7 chapters (71 percent) raised funds through raffle tickets.

Other frequent responses by advisers for FBLA and PBL include selling candy, plaques, valentine sales, concession stand, and carnival booths at school functions.

School Service Projects

As shown in Table 9, the school service projects conducted for both FBLA and PBL vary greatly. Clerical help to teachers is used most frequently by the FBLA chapters, receiving 43 percent of the total.
TABLE 8
FUNDRAISING ACTIVITIES

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th></th>
<th>PBL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses*</td>
<td>Percent</td>
<td>Responses*</td>
<td>Percent</td>
</tr>
<tr>
<td>None</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Stationery/Greeting Cards</td>
<td>8</td>
<td>29</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Raffle Tickets</td>
<td>2</td>
<td>7</td>
<td>5</td>
<td>71</td>
</tr>
<tr>
<td>Bake Sales</td>
<td>14</td>
<td>50</td>
<td>3</td>
<td>43</td>
</tr>
<tr>
<td>Novelties</td>
<td>5</td>
<td>18</td>
<td>3</td>
<td>43</td>
</tr>
<tr>
<td>Dance</td>
<td>4</td>
<td>14</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Clerical Work</td>
<td>6</td>
<td>21</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Car Wash</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Jewelry</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Candles</td>
<td>3</td>
<td>11</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Other</td>
<td>15</td>
<td>54</td>
<td>4</td>
<td>57</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Other services that are performed by FBLA and PBL chapters include hosting conferences, ushering, correcting test papers for high school vocational day, cleaning the school trophy cases, assisting with school programs, and decorating the school Christmas tree.
TABLE 9
SCHOOL SERVICE PROJECTS

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th>PBL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses*</td>
<td>Percent</td>
</tr>
<tr>
<td>None</td>
<td>9</td>
<td>32</td>
</tr>
<tr>
<td>School Newspaper/Yearbook</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>Clerical Help to Teachers</td>
<td>12</td>
<td>43</td>
</tr>
<tr>
<td>Bulletin Boards</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>Other</td>
<td>6</td>
<td>21</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Community Service Projects

In Table 10, 12 FBLA advisers (43 percent) and 3 PBL advisers (43 percent) reported soliciting funds for charitable organizations such as the March of Dimes for the major community service project.

Other community service projects mentioned that were not listed on the questionnaire include "sub for Santa", assisting civil defense, preparing holiday boxes for underprivileged children, and typing mailing lists for the Easter Seals.

Participation by Chapter Members

FBLA advisers reported in Table 11 that the greatest participation of FBLA members was at the state level. Twenty-four FBLA advisers or 86 percent reported participation by local members in state conferences and events. Forty-three percent of the FBLA chapters participated in state election campaigns, and 54 percent participated in state publications.
### TABLE 10
COMMUNITY SERVICE PROJECTS

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA Responses</th>
<th>FBLA Percent</th>
<th>PBL Responses</th>
<th>PBL Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>9</td>
<td>32</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Visit Children's Homes</td>
<td>4</td>
<td>14</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Pick Up Litter</td>
<td>3</td>
<td>11</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Solicit Funds</td>
<td>12</td>
<td>43</td>
<td>3</td>
<td>43</td>
</tr>
<tr>
<td>Christmas Carolling</td>
<td>1</td>
<td>7</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Donate Blood to Red Cross</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Visit Elderly or Shut-Ins</td>
<td>3</td>
<td>11</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Collect Coupons, Newspapers;</td>
<td>6</td>
<td>21</td>
<td>1</td>
<td>14</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Five FBLA advisers or 18 percent reported no participation by local members past the local level.

In Table 12, the greatest participation by PBL members was also at the state level. One hundred percent of the 7 PBL advisers reported participation in conferences, events, and election campaigns on the state level. Seventy-one percent of the PBL advisers reported participation in state publications.

There are no districts in Utah for PBL chapters; therefore, this column was eliminated in Table 12.
TABLE 11

LEVELS OF PARTICIPATION BY LOCAL CHAPTER MEMBERS (FBLA)

<table>
<thead>
<tr>
<th>Replies</th>
<th>District</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses*</td>
<td>Percent</td>
<td>Responses*</td>
<td>Percent</td>
<td>Responses*</td>
<td>Percent</td>
</tr>
<tr>
<td>Conferences/Meetings</td>
<td>9</td>
<td>32</td>
<td>24</td>
<td>86</td>
<td>13</td>
<td>46</td>
</tr>
<tr>
<td>Events (contests)</td>
<td>9</td>
<td>32</td>
<td>24</td>
<td>86</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Election Campaigns</td>
<td>3</td>
<td>11</td>
<td>12</td>
<td>43</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Publications</td>
<td>4</td>
<td>14</td>
<td>15</td>
<td>54</td>
<td>9</td>
<td>32</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.
**TABLE 12**

LEVELS OF PARTICIPATION BY LOCAL CHAPTER MEMBERS (PBL)

<table>
<thead>
<tr>
<th>Replies</th>
<th>State Responses</th>
<th>Percent</th>
<th>Regional Responses</th>
<th>Percent</th>
<th>National Responses</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conferences/Meetings</td>
<td>7</td>
<td>100</td>
<td>4</td>
<td>57</td>
<td>4</td>
<td>57</td>
</tr>
<tr>
<td>Events (contests)</td>
<td>7</td>
<td>100</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>71</td>
</tr>
<tr>
<td>Election Campaigns</td>
<td>7</td>
<td>100</td>
<td>1</td>
<td>14</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>Publications</td>
<td>5</td>
<td>71</td>
<td>1</td>
<td>14</td>
<td>2</td>
<td>29</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.*
Promotion in the School

Each of the 28 FBLA advisers and 7 PBL advisers reported in Table 13 some type of promotion of the local chapter within the school. Bulletin boards and the school newspaper were used most frequently by the FBLA chapters; 22 FBLA advisers (79 percent) reported the use of bulletin boards, and 21 FBLA advisers (75 percent) reported the use of the school newspaper.

PBL advisers reported 100 percent use of bulletin boards to promote the local chapter within the school. Six chapters (86 percent) also used the school newspaper and speakers in other classes for promotion purposes.

<table>
<thead>
<tr>
<th>TABLE 13</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>PROMOTION OF THE LOCAL CHAPTER IN THE SCHOOL</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th>PBL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses*</td>
<td>Percent</td>
</tr>
<tr>
<td>None</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bulletin Boards/Displays</td>
<td>22</td>
<td>79</td>
</tr>
<tr>
<td>School Newspaper</td>
<td>21</td>
<td>75</td>
</tr>
<tr>
<td>Speakers in Classes</td>
<td>7</td>
<td>25</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>14</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.
Promotion in the Community

Promotion of the local chapters in the community was not used as frequently as promotion in the school. Thirty-six percent of the FBLA advisers reported in Table 14 that no promotion was used in the community. The most frequently used community promotion was the newspaper, with 16 FBLA advisers (57 percent) checking this response. PBL advisers checked the local newspaper most frequently with five (71 percent) using this promotional device.

TABLE 14
PROMOTION OF THE LOCAL CHAPTER IN THE COMMUNITY

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th>PBL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percent</td>
</tr>
<tr>
<td>None</td>
<td>10</td>
<td>36</td>
</tr>
<tr>
<td>Television</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Brochure</td>
<td>6</td>
<td>21</td>
</tr>
<tr>
<td>Newspaper</td>
<td>16</td>
<td>57</td>
</tr>
<tr>
<td>Radio</td>
<td>4</td>
<td>14</td>
</tr>
<tr>
<td>No Response</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Members Expenses to Attend State Conference

Table 15 shows that a combination of several sources were used to send members to the state conferences. Individual members and chapter funds were most frequently reported by both FBLA and PBL advisers.
Nineteen FBLA (68 percent) and 6 PBL (86 percent) advisers utilized money from the individual members. Seventeen FBLA (61 percent) and 5 PBL (71 percent) advisers also received some funds from the local chapter.

When asked for percentages of the total dollar amount in each of the categories, answers were varied in each category. Advisers stated that the percentages in each category can vary each year.

**TABLE 15**

MEMBERS EXPENSES TO ATTEND STATE CONFERENCE

<table>
<thead>
<tr>
<th>Source of Funds</th>
<th><strong>FBLA</strong></th>
<th></th>
<th></th>
<th><strong>PBL</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percent</td>
<td>Responses</td>
<td>Percent</td>
<td></td>
</tr>
<tr>
<td>Individual Member</td>
<td>19</td>
<td>68</td>
<td>6</td>
<td>86</td>
<td></td>
</tr>
<tr>
<td>School District</td>
<td>6</td>
<td>21</td>
<td>1</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>Chapter Funds</td>
<td>17</td>
<td>61</td>
<td>5</td>
<td>71</td>
<td></td>
</tr>
<tr>
<td>Vocational Funds</td>
<td>7</td>
<td>25</td>
<td>2</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>No Response</td>
<td>4</td>
<td>14</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Members Expenses to Attend National Conference

In Table 16, 16 FBLA advisers (57 percent) reported that partial funding to attend the national conference comes from a combination of the individual member and local chapter funds. Five PBL advisers or 71 percent reported funds from the individual member and the chapter being used to pay members' expenses to the national conference. A
combination of several sources was reported by both the FBLA and PBL advisers.

Two FBLA advisers (7 percent) reported that funds are also received from the local high school and donations from businessmen for national conference attendance.

**TABLE 16**

MEMBERS EXPENSES TO ATTEND NATIONAL CONFERENCE

<table>
<thead>
<tr>
<th>Source of Funds</th>
<th>FBLA Responses</th>
<th>FBLA Percent</th>
<th>PBL Responses</th>
<th>PBL Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Member</td>
<td>16</td>
<td>57</td>
<td>5</td>
<td>71</td>
</tr>
<tr>
<td>School District</td>
<td>11</td>
<td>39</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Chapter Funds</td>
<td>9</td>
<td>32</td>
<td>5</td>
<td>71</td>
</tr>
<tr>
<td>Vocational Funds</td>
<td>4</td>
<td>14</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Other</td>
<td>2</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>No Response</td>
<td>9</td>
<td>32</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Advisers Expenses to Attend State Conference

The 28 FBLA advisers reported a combination of funds used to pay their attendance at the state conference. Thirteen FBLA advisers or 46 percent responded that partial funds come from the advisers. Five PBL advisers or 71 percent also reported funds from advisers being used to attend state conference. These percentages are reflected in Table 17.
TABLE 17
ADVISERS EXPENSES TO ATTEND STATE CONFERENCE

<table>
<thead>
<tr>
<th>Source of Funds</th>
<th>FBLA</th>
<th></th>
<th>PBL</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses*</td>
<td>Percent</td>
<td>Responses*</td>
<td>Percent</td>
</tr>
<tr>
<td>Adviser</td>
<td>13</td>
<td>46</td>
<td>5</td>
<td>71</td>
</tr>
<tr>
<td>School District</td>
<td>7</td>
<td>25</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>Chapter Funds</td>
<td>2</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Vocational Funds</td>
<td>9</td>
<td>32</td>
<td>3</td>
<td>43</td>
</tr>
<tr>
<td>No Response</td>
<td>5</td>
<td>18</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

Advisers Expenses to Attend National Conference

Table 18 indicates that the most frequent source of funds for advisers' expenses to attend the national conference comes from the advisers themselves. Nine FBLA advisers (32 percent) and 3 PBL advisers (43 percent) responded that they pay part or all of their expenses.

Additional Salary to Chapter Adviser

Only one FBLA and one PBL adviser reported receiving extra pay for advising the local chapter, as reported in Table 19. When asked for the dollar amount received, the FBLA adviser did not respond; the PBL adviser stated that $50 per month is received.
TABLE 18

ADVISERS EXPENSES TO ATTEND NATIONAL CONFERENCE

<table>
<thead>
<tr>
<th>Source of Funds</th>
<th>FBLA Responses</th>
<th>FBLA Percent</th>
<th>PBL Responses</th>
<th>PBL Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adviser</td>
<td>9</td>
<td>32</td>
<td>3</td>
<td>43</td>
</tr>
<tr>
<td>School District</td>
<td>6</td>
<td>21</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Chapter Funds</td>
<td>2</td>
<td>7</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Vocational Funds</td>
<td>7</td>
<td>25</td>
<td>2</td>
<td>29</td>
</tr>
<tr>
<td>No Response</td>
<td>11</td>
<td>39</td>
<td>3</td>
<td>43</td>
</tr>
</tbody>
</table>

*Advisers responded more than once.

TABLE 19

ADDITIONAL SALARY TO CHAPTER ADVISER

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA Responses</th>
<th>FBLA Percent</th>
<th>PBL Responses</th>
<th>PBL Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>No</td>
<td>27</td>
<td>96</td>
<td>6</td>
<td>86</td>
</tr>
<tr>
<td>TOTALS</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
</tbody>
</table>

Teaching Load of Chapter Adviser

Only one FBLA and one PBL adviser reported receiving a reduced teaching load for advising the local chapter, as shown in Table 20. Neither adviser responded when asked in what way the load was reduced.
TABLE 20
REDUCED TEACHING LOAD FOR CHAPTER ADVISER

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th></th>
<th>PBL</th>
<th></th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percent</td>
<td>Responses</td>
<td>Percent</td>
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<tr>
<td>Yes</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>14</td>
</tr>
<tr>
<td>No</td>
<td>27</td>
<td>96</td>
<td>6</td>
<td>86</td>
</tr>
<tr>
<td>TOTALS</td>
<td>28</td>
<td>100</td>
<td>7</td>
<td>100</td>
</tr>
</tbody>
</table>

Hours Spent Per Month by Chapter Advisers

The hours spent by the local chapter advisers were tabulated in Table 21. The answers vary from under 5 hours per month to over 40 hours per month. The most frequent response by the FBLA advisers was 6 to 10 hours per month; 10 advisers (35 percent) checked this response. There was no common category checked by the PBL advisers.

Recommendations for Additional State Events

All advisers were asked for their recommendations to the state organization for additional events (contests). Following are their comments:

FBLA Advisers—more activities for members not involved in contests at certain times during the day (guest lecturers, etc.), especially
### TABLE 21

**HOURS SPENT PER MONTH BY CHAPTER ADVISERS**

<table>
<thead>
<tr>
<th>Replies</th>
<th>FBLA</th>
<th>PBL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Responses</td>
<td>Percent</td>
</tr>
<tr>
<td>0 - 5 hours</td>
<td>5</td>
<td>18</td>
</tr>
<tr>
<td>6 - 10 hours</td>
<td>10</td>
<td>35</td>
</tr>
<tr>
<td>11 - 20 hours</td>
<td>7</td>
<td>25</td>
</tr>
<tr>
<td>21 - 30 hours</td>
<td>3</td>
<td>11</td>
</tr>
<tr>
<td>31 - 40 hours</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Over 40 hours</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>28</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

for the boys; no more events; bi-monthly president council meetings or bi-monthly advisers' meetings; not have the state conference at Logan--too far.

**PBL Advisers**--dispense with poster contest; add business machines; junior and senior accounting contest; records management test; marketing test; some two-year competition.

**Recommendations for Other State-Sponsored Activities**

All advisers were asked for their recommendations to the state organization for further state-sponsored activities. Following are their comments:
**FBLA Advisers**—better and more accurate information on all state events, especially state contests; unbiased judging and representatives from all chapters as judges; continue summer workshop.

**PBL Advisers**—more inter-chapter meetings; state specialist meet with local clubs once a year.

**Other Recommendations**

All advisers were asked for further recommendations to the state organization. Following are their comments:

**FBLA Advisers**—lower speed for junior stenographer events and the shorthand speeds should be dictated from high to low; parliamentary procedures teams should be allowed an alternate or be allowed to participate with only four; junior stenographer speeds should be 70, 80, 90; beginning typing should have a choice of electric or manual typewriters; more clarification on state contests and earlier published information; more activities for all who attend; are there enough clubs to hold district competition; list due dates for registration on cover letter or do not have separate dates for registration and payments.

**PBL Advisers**—work closer with business world—would create more sponsors for funding; have regionals to qualify for state; complete work on state constitution and by-laws—constitution committee composed of a delegate from each chapter; two vice-presidents, one from northern and one from southern part of the state and funds provided for them to travel to various chapters in their region; perhaps the Executive Board should also include each local chapter president; state contests are no valid or reliable—the tests need to be written to measure
performance objectives as well as objective general business knowledge; vocabulary relay should use business-economic vocabulary—words were not of the same usage or difficulty level; business teacher and executive tests weren't educationally oriented; case problems on business administration test and executive decision making had no criterion for judges to objectively grade the case; state contests should be held 3 or 4 weeks earlier to prevent all the scheduling and hassles during spring quarter recess and registration; hold state meeting at an hour that would permit travel to and from there the same day.

**Recommendations for Starting a New Chapter**

All advisers were asked for their recommendations to teachers wishing to start a new chapter of FBLA or PBL at their school. Following are their comments:

**FBLA Advisers**—get an early start by meeting with officers before school starts; get strong leaders as officers; be sure there is a need for the club in your school and find out if the students want this club and have the time to participate in it; attend workshops; need complete instructions and idea exchange; try to involve all the business faculty to gain their support; administrative support is essential; let the students do the organizing; ENTHUSIASM; don't wait—do it as soon as possible; work hard for administrative support; make sure the officers they pick are enthused about the program and are willing to work; be sure to get the complete support of the administration; use two sponsors; get involved.
PBL Advisers—get the support of students and administration; attend workshops; talk with other advisers; reduce workload for adviser; have enthusiasm and display belief in the organization because it has a powerful influence on potential members.
CHAPTER IV
SUMMARY, CONCLUSIONS AND RECOMMENDATIONS

Introduction

The purpose of this study was to develop a handbook for the Future Business Leaders of America (FBLA) and Phi Beta Lambda (PBL) chapter advisers in Utah to use as a guide for the chapter operations.

A questionnaire was sent to the 34 FBLA advisers and 8 PBL advisers in May. A total of 35 of the 42 questionnaires or 85 percent were returned. Of the 34 questionnaires sent to the FBLA advisers, 28 were received for an 82 percent response. Of the 8 questionnaires sent to the PBL advisers, 7 were returned for an 87 percent response.

The handbook was developed from the findings of the questionnaire, with further information being gathered from other state handbooks, Mr. Gary Lloyd, State Chairman for FBLA and PBL, and the two state advisers.

Summary of the Findings

The results of the questionnaire are summarized as follows:

1. Eighty-one percent of the FBLA chapters and 71 percent of the PBL chapters require the members to be enrolled in or have taken a business course.

2. Eighty-nine percent of the FBLA chapters and 85 percent of the PBL chapters have at least 40 percent attendance at their regular meetings.

3. There was no majority agreement on meeting times and days for either organization. Thirty-six percent of the FBLA chapters meet during a regularly scheduled class. Forty-three percent of the PBL chapters meet after school.
4. Fifty percent of the FBLA chapters and 57 percent of the PBL chapters hold bi-monthly meetings. Thirty-nine percent of the FBLA chapters hold monthly meetings.

5. Local dues are collected in 100 percent of the PBL chapters and in 86 percent of the FBLA chapters. The amounts collected differ with each chapter.

6. One hundred percent of the PBL chapters elect a president, vice-president, secretary, treasurer, and historian. One hundred percent of the FBLA chapters elect a president and vice-president, with 96 percent electing a secretary.

7. One hundred percent of the FBLA and PBL chapters hold business meetings as a part of the regular meetings.

8. Only 36 percent of the FBLA chapters and 29 percent of the PBL chapters hold a year-end activity. Most of these chapters make this an informal party instead of a formal banquet.

9. One hundred percent of the FBLA and PBL chapters conduct some type of fundraising project. Bake sales were used by 50 percent of the FBLA chapters, and raffle tickets were used by 71 percent of the PBL chapters.

10. There was no clear majority on school service projects conducted for either FBLA or PBL. The most frequent answer for FBLA was clerical help to teachers at 43 percent.

11. There was no clear majority on community service projects conducted by either organization. Forty-three percent of both the FBLA and PBL chapters solicit funds for charitable organizations.
12. Eighty-six percent of the FBLA chapters and 100 percent of the PBL chapters have members participating at the state level in conferences and events.

13. Each of the FBLA and PBL chapters promote the chapter within the school.

14. Fifty-seven percent of the FBLA chapters and 71 percent of the PBL chapters promote the local chapters within the community through the use of the newspaper.

15. Members and advisers attending the state and national conferences receive funds from various sources with no majority being seen in any one category.

16. Only one FBLA and one PBL adviser receive pay for advising the local chapter.

17. Only one FBLA and one PBL adviser have a reduced teaching load.

18. Sixty percent of the FBLA advisers spend between 6 and 20 hours per month on chapter-related activities. There was no common category for the PBL advisers.

Conclusions

1. Members of a majority of FBLA and PBL chapters in Utah must be enrolled in or have taken a business course.

2. Attendance at meetings vary, with most chapters having at least 40 percent of the membership present.

3. Each chapter sets a meeting time and day that is convenient to most of the members.
4. Meetings are held once or twice a month by the majority of FBLA and PBL chapters.

5. FBLA and PBL chapters generally charge local dues, the amount varying with the organization.

6. Officers are elected by all FBLA and PBL chapters, with most chapters electing a president, vice-president, secretary, treasurer, and historian.

7. Business meetings are held by all FBLA and PBL chapters.

8. Most of the Utah chapters do not hold a year-end banquet. Those that have a year-end activity keep the activity informal.

9. All FBLA and PBL chapters conduct fundraising projects. Types of projects used differ with the chapter and the opportunities available for various projects.

10. Service projects conducted in the school and community differ widely, depending on the needs of the school or community and the talents and resources of the chapter members.

11. Members are active at levels other than the local level in most of the FBLA and PBL chapters. The most popular level beyond the local level is the state.

12. All chapters of FBLA and PBL promote the chapter within the school. Bulletin boards and displays are used widely by both organizations.

13. A majority of the chapters promote the chapter within the community through the use of the newspaper. Other media are not used as extensively.
14. The advisers reported that sources for funds and the amounts received from each source to attend state and national conferences vary. It was also reported that the amounts and sources may change each school year; therefore, it is difficult to draw any conclusions from the data given.

15. Advisers of FBLA and PBL are generally not paid for advising the local chapter.

16. Advisers generally do not receive a reduced teaching load when advising an FBLA or PBL chapter.

17. There was no common amount of time reported that the advisers devote to chapter-related activities.

18. Many advisers would like to see more contests or activities added at the state leadership conference.

19. Many advisers feel there is a need to revise some contest rules.

20. FBLA and PBL advisers believe it is important that the adviser be enthusiastic and has the support of the students and administration.

Recommendations

The following recommendations are made on the basis of the findings and conclusions from this study:

1. More communication is needed between the state department and local chapter advisers in the form of more workshops, written communications, and visits from the state chairman and advisers.

2. More communication is needed between the local chapter members and advisers. Joint meetings and more workshops may aid in this area.
3. The handbook developed should be kept current and updated each year. It is recommended that the State Executive Board or a committee of local advisers assume this responsibility.

4. A committee should be established to revise contest rules for the state leadership conference.

5. The state constitution should be revised through the State Executive Board; By-Laws need to be written for both organizations.
CHAPTER V

HANDBOOK FOR FBLA AND PBL ADVISERS IN UTAH
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Preface

This PBL and FBLA State Handbook has been prepared to serve as a guide to local advisers and members, giving facts and information about the state organization and local chapter planning.

In it you will find many suggestions and helpful hints for creating and maintaining a successful chapter. Many of the suggestions are based on a questionnaire sent to all local advisers in May, 1975, under the direction of Gary M. Lloyd, FBLA and PBL State Chairman, and Diane K. Linn, graduate student at Utah State University.

Rules and regulations for each contest are presented to eliminate misunderstandings. These should be read very carefully by chapter advisers and contestants.

Because the goal of this handbook is to supplement the national handbook, you will find it helpful to obtain copies of both. Any questions concerning the contents of this handbook should be directed to the State Chairman.

FBLA-PBL Purposes

The purposes of FBLA-PBL are to:

1. Develop competent, aggressive business leadership.

2. Strengthen the confidence of young men and women in themselves and their work.

3. Create more interest and understanding in the intelligent choice of business occupations.

4. Encourage young men and women in the development of individual projects and in establishing themselves in business.

5. Encourage young persons to improve the home and community.
6. Participate in worthy undertakings for the improvement of business and the community.

7. Develop character, prepare for useful citizenship, and foster patriotism.

8. Participate in cooperative effort.


10. Encourage improvement in scholarship and promote school loyalty.

11. Improve and establish standards for entrance into business occupations.

FBLA-PBL Creed

I believe that free education is the right of every young person in America.

I believe that the future of America depends upon mutual understanding and cooperation of business, industry, labor, the home, the church, the school, and by the peoples of our own and other lands. I agree to do my utmost to bring about better understanding and cooperation on the part of all these groups.

I believe every young person should prepare himself for a useful occupation, and that he should carry on that occupation in a manner that will bring the greatest good to the greatest number.

I believe every young person should be actively interested in better social, political, community, and family life.

I believe every young person has a right to earn his living at a useful occupation and that this right should not be denied him because of race, color, or creed.
I believe every young person should take responsibility for carrying out assigned tasks in a manner that will reflect credit to himself, his associates, his school, and his community.

I believe in my own ability to work efficiently and to think clearly, and I pledge myself to use these abilities to make America a better place for everyone.

FBLA-PBL Code of Ethics

I will be honest and sincere in all my business dealings.

I will approach each task with confidence in my ability to perform my work at a high standard.

I will willingly accept responsibilities and duties assigned to me.

I will respect my employer and fellow workers and be considerate of them.

I will seek to profit by my mistakes and take suggestions and criticisms directed toward the improvement of myself and my work.

I will, to the best of my ability, abide by the rules and regulations of my employer.

I will exercise initiative and responsibility and will cooperate with my employer and fellow workers.

I will dress and act in a manner that will bring respect to me and to my employer.

I will use my time to the best advantage of my employer.

I will seek to improve my community by contributing my efforts and my resources to its worthwhile projects.
LOCAL CHAPTER
Procedures for Chartering a Chapter

An FBLA or PBL chapter should be the result of cooperative effort on the part of the business students and the business teachers. For a successful chapter, there is no substitute for real enthusiasm on the part of all concerned.

The following basic suggestions will aid business teachers and students in organizing a chapter:

1. Use the present business club as the nucleus for a chapter. If no business club exists, talk to the students, to school administrators, and to teachers about the value of FBLA-PBL.

2. Write to your FBLA or PBL state adviser or to the national office in Washington D.C. (P.O. Box 17417-Dulles, Washington, D.C. 20041), requesting a charter application packet.

3. Review the materials you receive from the national and state offices.

4. Publicize an organizational meeting.

5. At the organizational meeting, elect officers and select temporary committees (constitution, projects, and membership) to complete the prerequisites for chartering.

6. Before writing the proposed constitution for your chapter, study the sample constitution, the constitution of your state chapter, and the national constitution.

7. Submit the following items to the FBLA or PBL state adviser: 
   (a) application for charter, (b) copy of proposed chapter constitution
and bylaws, and (c) list of charter members. Membership dues are paid by two separate checks, one payable to the state chapter, the other to national.

8. Elect or choose chairmen for the standing committees.

9. Form an advisory committee of business men and women from the local community to work with the members of the chapter. This advisory committee may also include school officials.

10. When the chapter charter and other materials arrive, plan for a formal installation.

Checklist for Starting an FBLA-PBL Chapter

_____ 1. Talk to students you know personally (your classes).
_____ 2. Have students talk to their friends.
_____ 3. Talk to students in other business classes.
_____ 4. Set a date, and have a meeting. Have students complete an application to join—showing which office they would like to run for, or which committee they would want to serve on. Suggested committees might be: social, finance, scholarship, public relations, etc. Elected officials of FBLA-PBL are: President, Vice President, Secretary, Treasurer, Reporter, Historian, and Parliamentarian. Let interested students campaign. Have an election and installation.

_____ 5. Arrange with the state office to obtain your charter. A request for this material should be directed to the State Chairman.

_____ 6. Send State and National dues, and all other papers to the State Chairman. Send two separate checks, one for state, the other for national. We suggest dues for each student be $4 ($1.50 for State dues, $1.50 for National dues, and $1 for the local organization).
7. Have officers and committee chairmen for each committee meet with a calendar, and plan most activities for the year. This is a must in order for the organization to remain active. Week to week planning causes problems. After the long-range plan for the year has been set forth, then week to week planning is a must from there on.

8. Arrange activities with other school organization.

Requirements to join

1. Must be taking, or must have been enrolled in a business class.

2. Must be a full-time student.

Procedures for Installation Ceremony for Future Business Leaders of America and Phi Beta Lambda

Please read the script which follows very carefully inasmuch as it is a combination of the three separate ceremonies that appear in the national handbook. It is the one which is used in Utah for chartering a chapter, installing state officers, and installing chapter members. Please review the responsibilities that are included for the assistant installing official. This person may either be the chapter adviser or an invited guest such as a state officer. The creed should be delivered by a state officer, chapter adviser, or member of the chapter.

Membership cards and guest book

When membership cards are handed to each member, it is appropriate to have them sign a guest book or charter membership book at the same time of the receipt of the chapter membership card. This is, of course, optional.
Room arrangement

No specific physical arrangements are called for in the national handbook. However, for ease in operating the entire ceremony, it has been convenient to have a center table with a table podium where the installing official may rest his notes for the presentation of the whole ceremony. On this table there should also be the white candle used by the installing official. Also, near the podium should be a small reading light which may be used when the overhead lights are to be out during the major part of the ceremony. To the left of the table where the installing official stands, there is usually a second table with four chairs. Seated in these chairs are those members who are going to take part in the program. In front of the first person (future) is a crystal ball, the second person (business) has a typewriter in front of him, the third person (leader) has in front of him a construction paper model of two graduates, and the fourth person (America) has an American Flag placed on the table or a larger flag is placed to his immediate left. On the right side of the middle table place enough chairs to accommodate the officers to be installed. The president of the chapter should be to the immediate right of the middle table and the additional officers should be to the president's immediate right. In front of each of them will be found the particular candle which they will use in the ceremony.

An appropriate FBLA or Phi banner can be placed behind the center table or near the center of the room.

It is advisable to have the members come in best dress.
Publicity

Included in those who generally receive invitations to an FBLA-PBL installation is the superintendent of the school district, vocational director, principal, business faculty, and any additional faculty who might have an interest in becoming part of the activity. Parents and any district, school, or other personnel which the adviser and the members wish to have in attendance should be invited.

Arrange to have a photographer from the school paper at the ceremony to take pictures. If this is not possible, you should arrange to have a camera available for pictures. This is an event which could and should receive a great deal of publicity throughout the school. Pictures from this installation can appropriately be placed in yearbooks and school newspapers for the students to look back on. In most installation ceremonies, refreshments are served in the form of punch, cookies, etc. This is, of course, optional.

Additional speaker

An additional speaker to the installation ceremony is optional. The ceremony generally lasts about 25 minutes without adding a speaker. The installing official generally gives brief remarks to exceed not more than five minutes.

Chapter installation service--installation of officers

Date: ____________, Time: ______________.

State Chairman--(Standing) The Future Business Leaders of America is the national organization for all students of business. I have been authorized by the FBLA national organization to conduct the installation of the _______________ Chapter into the Future Business Leaders of
America. Let us consider the words in the name of our organization, and what these words mean to us.

Speaker #1--Future.
Speaker #2--Business.
Speaker #3--Leaders.
Speaker #4--America.

Assistant--Reads purpose for FBLA (Lights off-Podium Light).

State Chairman--Will the newly elected officers of ____________ Chapter of FBLA please come forward as I announce your office. (Light 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 has been elected.

Lights out.

______________, Historian. You have been elected historian of the ____________ Chapter of FBLA. As historian your job shall be to maintain all records of the chapter, including annual activity reports, awards, and publicity. You are also responsible for keeping an up-to-date chapter scrapbook. Do you accept this responsibility and promise to fulfill your duties to the best of your ability?

Historian--Historian: I do.

State Chairman--I now declare you in the name of the ____________ Chapter of FBLA, the historian.

Historian--(Selects violet candle and is lit by official).

State Chairman--This violet candle symbolizes the inspiration and enlightenment that can be brought by keeping a record of the activities of the _________________ Chapter of FBLA. ________________, Treasurer.

You have been elected treasurer of the ____________ Chapter of FBLA.
In electing you to this office, members have shown their faith in your business ability and your honesty. Do you promise to keep accurate records of all money received and disbursed and to present orderly reports upon proper requests?

Treasurer--Treasurer: I do.

State Chairman--I now declare you, in the name of the _______ Chapter of FBLA, the treasurer.

Treasurer--(Selects blue candle and is lit by official).

State Chairman--This lighted blue candle symbolizes the trust and confidence which the members have in your ability to safeguard all funds. ________, Secretary. You have been elected secretary of the _______ Chapter of FBLA. Accepting this office obligates you to present and keep a record of what takes place at every meeting. Do you accept the responsibility and promise to fulfill your duties to the best of your ability?

Secretary--Secretary: I do.

State Chairman--I now declare you, in the name of the _______ Chapter of FBLA, the secretary.

Secretary--(Selects yellow candle and is lit by official).

State Chairman--This yellow candle symbolizes constancy in attendance and in keeping members informed of the chapter's progress. ________, Vice-President. You have been elected vice-president of the _______ Chapter of FBLA. Your duty will be to assume the responsibilities in the absence of the president, acting in her stead. Will you strive to carry out the duties of this office?

Vice-President--Vice-President: I will.
State Chairman--I now declare you, in the name of the ____________
Chapter of FBLA, the vice-president.

Vice-President--(Selects orange candle and is lit by official).

State Chairman--This orange candle is the symbol of the harmony and faithfulness which should characterize your efforts in working with the president to carry out the ideals of this chapter. ________________,
President. The members of the ________________Chapter of FBLA have bestowed upon you a great honor in electing you their president. Your major responsibility is to lead and encourage this chapter in all its activities. It is your duty to preside at all meetings and see that they are conducted in accordance with the constitution and correct principles of parliamentary practice. Do you accept this responsibility and promise to fulfill your duties to the best of your ability?

President--President: I do.

State Chairman--I now declare you, in the name of the ____________
Chapter of FBLA, the president.

President--(Selects red candle and is lit by official).

State Chairman--This red candle is the symbol of your duties and obligations to the chapter and its members.

State Chairman--(Addressing members of chapter) 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 ____________
Chapter of FBLA for the coming year.

Blow out candles--lights on.

State Chairman--By authority of FBLA-PBL, Inc., I am pleased to present you with the official charter for your chapter.
Read charter.

State Chairman--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 of Future Business Leaders of America and as part of the state chapter and the national organization. The responsibility of making the ______________ Chapter of FBLA a success rests with its members and officers.

(Chapter president accepts the charter from installing officer.)

President--I, on behalf of the officers and members of the _______ Chapter of FBLA, accept the honor, privileges, and responsibilities entrusted to us, and we shall endeavor at all times to carry out the purpose of FBLA.

State Chairman--Will the ______________ Chapter President, _______, give the oath of membership to the charter members of the chapter.

(Chapter officers stand and face audience.)

President--The secretary will now read the names of the charter members of the ______________ Chapter of the Future Business Leaders of America, and as the names are read, the members will please rise and remain standing until all members have been presented.

Secretary--(Reads slowly names of each charter member. They stand and remain standing until oath has been administered.)

President--Will each of you now raise his right hand and repeat the oath after me.

Oath.

President--As President of the ______________ Chapter of the Future Business Leaders of America, I declare you duly inducted as charter members.
State Chairman--___________ of _________ High School will lead us in reciting in unison the Creed of the Future Business Leaders of America.

Creed.

Secretary--(Presents membership cards and has members sign charter scroll.)

State Chairman--(Presents gavel to new president, ____________)

Short speech.

President--(Announces remarks from Principal, ________________.)

Principal--Remarks.

President--(Closes meeting--refreshments.)

Future (Speaker No. 1)--You have often heard people ask, "What does the future hold for us?" Perhaps we should change that question to, "What have we to offer the future?" Involving ourselves in leadership activities, in addition to our daily educational experiences, prepares us for the challenges of a future in business.

We can broaden our education for the future in many ways. We can profit by the experience of others--those who have preceded us as well as our teachers and other adults with whom we associate. We can read current publications and study subjects that will aid us not only in meeting changing conditions but will also facilitate our understanding the varied economic systems of the world. Only a willingness to learn can allow one to offer any good part of himself to the future.

"Future," in our title, is represented by a crystal ball.
Business (Speaker No. 2)--To be successful in business, a person must be educated in business methods and procedures and have a knowledge of the economic system and operation of government. He must understand how business may serve and how people are served through business. He must appreciate the part business and education play in the life of the average person and become alert to the ways and means of improving standards of conduct in business so that the greatest good comes to the greatest number.

"Business" in our title is represented by the typewriter.

Leaders (Speaker No. 3)--In our democratic society, we must have leaders--leaders in business, industry, government, politics, the professions, and in community life. The future of our country depends on the quality of leadership we produce, so we must learn to recognize the situations in which our individual talents become useful. Leadership implies honor, foresight, tact, competency, dependability, discretion, and integrity. A leader must listen and be able to take criticism, discarding the petty and adjusting his actions to the constructive. A leader must be able to conceive new and workable ideas. He must be able to take failures in his stride, but to profit from them. FBLA emphasizes the duty of its members to prepare for the great task of business leadership in the years ahead.

"Leaders" is represented by these two graduates.

America (Speaker No. 4)--America is a leader in the politics and economics of the world. If America is to continue this leadership, its young people must prepare themselves for the challenges ahead. Alert
young men and women are needed to guide our country in its future. Business students are preparing themselves to assume this responsibility by studying America's past and analyzing its present problems. The future of America depends to a great degree upon the initiative and success of leaders in business. It is up to us who plan to enter business professions to take advantage of the opportunities offered, strive for leadership in the field of business, and help strengthen America.

"America" in our title is represented by the American Flag.

Local Chapter Organization

Membership requirements

The existing FBLA and PBL chapters in Utah follow the membership requirements suggested by the national office. Members are required to be enrolled in or have taken a business course. One college and one high school chapter also require a 3.0 grade point for new members.

Local meetings

Attendance at local meetings varies greatly with the organization. A majority of the Utah PBL chapters have 40 to 60 percent of the total membership at each meeting. Most of the FBLA chapters in Utah have attendance above 40 percent of the total membership.

Each chapter must experiment with various meeting days and times to find the one that is most convenient for the members. Utah PBL and FBLA chapter advisers suggest the following meeting times: during school activity hour, during regularly scheduled classes, after school, or before school. Most of the PBL chapters meet bi-monthly; most of the FBLA chapters meet bi-monthly or monthly.
Local dues

In addition to the state and national dues, several of the local Utah chapters collect local dues. Dues range from 50 cents to $3.50 with the majority of FBLA and PBL chapters charging $1.00 per year.

Chapter meetings

Each FBLA and FBL chapter holds a regular business meeting as a part of the program. In addition, local advisers suggest the following activities: films (leadership training or business-related), speakers from the local community, socials, field trips, business demonstrations, and skits by chapter members.

Year-end activities

Most of the local chapters in Utah do not hold a formal year-end banquet, but several do have a party to close a successful year.

Those chapters that have held formal banquets have included the following on the program: installation of new officers, guest speaker, outstanding members honored, introduction of the advisory board, and distribution of business department achievement certificates.

Duties of Local Officers

The success of FBLA and PBL on the national and state levels is dependent upon the effective operation of the local chapter. Therefore, it is essential that the local chapters operate under effective leadership.

A majority of the local chapters in Utah elect a President, Vice President, Secretary, and Treasurer. The Parliamentarian, Historian, Reporter, and Committee Chairmen are elected or appointed from the membership.
The local executive board is comprised of officers, committee chairmen, and the chapter adviser. Often a representative of each area in the business curriculum serves on the executive board (i.e. accounting, data processing, clerical, and secretarial).

Committee Chairmen most frequently selected in Utah include: social, service, fundraising, program, finance, auditing, publication, hospitality, public relations, and evaluation.

Duties of the local president

The responsibilities of the local president are to:

1. Develop a working knowledge of parliamentary procedure and preside over chapter meetings and executive board meetings.
2. Appoint needed committees.
3. Work closely with the local adviser.
4. Maintain open communication with officers and chapter members.
5. Represent the chapter at school functions and at meetings of other organizations.
6. Correspond with the state officers.
7. Encourage local members to become more active at all levels of the organization.
8. Assume direct responsibility for the work of all standing committees.

Duties of the local vice president

The responsibilities of the local vice president are to:

1. Develop a working knowledge of parliamentary procedure to preside over chapter meetings in the absence of the president.
2. Assist the president in all matters assigned.

3. Assume the direct responsibility for the work of all special committees.

4. Serve on the local executive board.

5. Encourage local members to become more active at all levels of the organization.

Duties of the local secretary

The responsibilities of the local secretary are to:

1. Serve on the local executive board.

2. Keep an accurate record of the proceedings of chapter meetings and executive board meetings.

3. Count and record votes on all elections.

4. Carry on the correspondence of the chapter.

5. Encourage local members to become more active at all levels of the organization.

Duties of the local treasurer

The responsibilities of the local treasurer are to:

1. Serve on the local executive board.

2. Prepare an annual chapter budget with the help of the executive board.

3. Handle the chapter’s funds and write receipts.

4. Present a financial report at chapter meetings when requested by the president.

5. Encourage local members to become more active at all levels of the organization.
Duties of the local parliamentarian

The responsibilities of the local parliamentarian are to:

1. Serve on the local executive board.

2. Have a working knowledge of parliamentary procedure to call attention to any error in chapter meeting procedures.


4. Encourage local members to become more active at all levels of the organization.

Duties of the local historian

The responsibilities of the local historian are to:

1. Serve on the local executive board.

2. Keep the chapter scrapbook up to date with all activities in written and pictorial form.

3. Encourage local members to become more active at all levels of the organization.

Duties of the local reporter

The responsibilities of the local reporter are to:

1. Serve on the local executive board.

2. Send articles and pictures of interest to the state reporter to be included in the state newsletter.

3. Send articles and pictures of interest to the national office to be included in the national publication.

4. Encourage local members to become more active at all levels of the organization.
How to Conduct a Business Meeting

Parliamentary procedure is not difficult! It is based largely on common sense and courtesy and can aid the organization in carrying out its business quickly and efficiently.

Parliamentary procedure was developed by Major Henry M. Robert, a member of the engineering corp of the United States Army. His book, Robert's Rules of Order (1876), is recognized today as the standard rules for conducting a meeting.

The use of parliamentary procedure in business meetings assures that chapter business will be transacted with speed and efficiency, protects the rights of all members, and preserves harmony within your group.

To achieve these purposes, there are five basic principles of parliamentary procedure to note:

1. Only one subject may be discussed at one time.
2. Each subject brought before the organization is entitled to full and free debate.
3. There are equal rights for all members of the organization.
4. The majority rules, but the rights of the minority are preserved.
5. The desires of each member are merged through teamwork into the goals of the organization.

It is important that all members of the chapter be informed concerning basic parliamentary procedures. Following are some aids in planning local chapter meetings.

There are several "Keys to Having Successful Meetings." The following suggestions may prove helpful in planning FBLA or PBL meetings.

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1. It should be planned in advance and an agenda prepared.

2. It should be opened and closed on time.

3. It should move along with pep and enthusiasm so members will not become bored and time will not be wasted.

4. The presiding officer should proceed according to the order of business shown in this handbook.

5. Parliamentary procedure should be used correctly.

6. Chapter equipment should be used in the opening and closing ceremonies.

7. It is essential that committee reports are well prepared.

8. Each officer must know his duties and responsibilities.

9. Interest of all members must be held throughout the meeting. Make every member feel wanted and needed; be sure to give recognition where deserved. Promote enthusiasm.

10. Business and entertainment are included.

Most of Utah FBLA and PBL chapters have found it helpful to meet bi-monthly or monthly. Times vary with the school from early morning meetings, those during the school hours, and meetings scheduled during the evening. It is suggested, however, that a specific time and day be scheduled for the regular business meetings.

**Parliamentary procedure reference books**

To help chapter members further understand parliamentary procedure, below is a list of reference books chapters may wish to purchase.


Meeting agenda

The Agenda or standard Order of Business is the format that meetings should follow. Any format may be adopted, but the following is suggested:

1. Call to order by presiding officer.
2. Roll call to establish a quorum and take attendance.
3. Reading and approval of minutes of the previous meeting.
4. Reports of officers—president, vice president, treasurer, etc.
5. Reports of standing and special committees.
6. Unfinished business.
8. Program—speaker, film, etc.
9. Announcements.
10. Adjournment.

The chapter may wish to modify the above suggested agenda to meet the needs and desires of members. (For example, beginning each meeting with the FBLA-PBL Pledge.) An agenda should be adopted that can be used at all regular business meetings.
When time is limited for meetings, use one or more of the following "Meeting Time Savers."

1. Instead of roll call, members can drop their names in a box as they enter or leave; or, everyone can sign a sheet of paper.

2. Occasionally shorten or omit the opening and closing ceremonies.

3. Post the previous meeting's minutes for members to read and correct, and unless corrections are submitted by a certain date, they will stand as recorded.

4. Alternate reports of officers and committees at different meetings, rather than having them all at every meeting.

5. All committees and chairmen should have well-prepared reports; if they are typed and read, additional time can be saved.

6. Committee reports can be limited to two minutes with three minutes of discussion on each report.

7. Buzz sessions can be limited to six or eight minutes, leaving the rest of the time to report back to the group and make decisions or summarize findings.

8. See that the room and necessary materials are arranged in advance.

9. Have a timekeeper watch a clock so that all stay on schedule; be sure that all participants know the time limitations.

10. If refreshments are to be served, they can be picked up cafeteria style as members enter, and eaten while the meeting is going on.

Minutes of the meeting

The minutes are an accurate account of what business was brought before the chapter and what was decided at the meeting. Minutes should be

kept simple but contain the following information:

1. Name of the organization, the date, the place, and time of the meeting.
2. Kind of meeting (regular or special).
3. Name of the presiding officer and person taking minutes.
4. Whether or not the minutes of the previous meeting have been approved as read, approved as corrected, or if their reading is dispensed with.
5. Motions exactly stated including the name of the maker of the motion, the fact that the motion was seconded, and the action taken—whether it carried or lost.
6. Other items listed on the agenda.
7. Time the meeting was adjourned.
8. Signature of the secretary. 32

Minutes should be kept in a bound book and should be up to date in typewritten form. Use the samples on the following pages as a guide to keeping chapter minutes.

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32 Kentucky State PBL Handbook, p. 3.5 and Arizona State FBLA Handbook, p. 45.
Minutes of __________ Chapter Meeting

The regular meeting of the __________ Chapter was held at (time), (date), (place), with President (name) presiding. ________ members were present. The minutes of the previous meeting were read and approved as corrected.

The report of the Treasurer shows receipts from dues, $_______. For disbursements: postage and stationery, $_________; leaving a balance of $__________.

The report of the Standing Committee on Programs was received and approved and a copy of the report is filed with the minutes of this meeting.

Under new business, a discussion of ways and means of paying the expenses of delegates to the State Leadership Conference was brought up. A motion was made by (name), and seconded that the chapter sponsor a Spring Carnival in the school gym, and that a committee of three be appointed by the Chair to make all arrangements and report at the next meeting. Motion carried, and the Chair appointed (name), (name), (name) to serve on this special committee.

On motion of (name), and seconded, the meeting was adjourned at (time).

(Signed Name)
(Chapter Secretary)

33 Arizona State Handbook, p. 46.
Minutes of ______________ Chapter Meeting

MEETING
The regular meeting of the ______________ Chapter of the Future Business Leaders of America, held (place) was called to order at (time) by the President, (name)_, (date)_.

INVOCATION
Invocation was given by (name)___________.

PLEDGE
Pledge of Allegiance to the Flag was led by (name)___________.

GUESTS
The following guests were introduced: (names)___________.

ROLL CALL
(names)___________. were present. (name)___________, and (name)___________. were absent.

MINUTES
Minutes of the meeting of ______________ were approved as read.

TREASURER'S REPORT
The treasurer reported: ______________.

BILLS
The following bills were presented: ______________. On motion by (name)__________, the bills were ordered paid.

COMMITTEE REPORT
Membership Chairman, (name)___________. reported two new members, (name)___________. and (name)___________.

CORRESPONDENCE
An invitation was read from the (name)___________. Chapter to attend their installation on (date and time)___________. Those planning to go will make reservations with (name)___________. by (date)___________.

NEW BUSINESS
The motion by (name)___________. and seconded "that a new timer be purchased by the treasurer at the prevailing price" was adopted.

PROGRAM
(name)___________. spoke on the subject of (title)___________.

ANNOUNCEMENTS
Meeting of all officers was announced for (date)___________.
(place)___________. at (time)___________.

ADJOURNMENT
The meeting adjourned at ______________.

__________________________
Chapter Secretary

34 Arizona State Handbook, p. 47.
Treasurer's report

The treasurer's report is important to the chapter and its activities and must be kept current and in typewritten form. This report can be simplified using the following sampler:

Treasurer's Report (Simplified)

(Date)

Balance on hand at date of last report $_______

Receipts since last report
  Dues
  Other revenue

  Total: $_______

Disbursements:
  Cost of merchandise
  Other expenses

  Total: $_______

Present Balance: $_______

__________________________
Treasurer

Local Adviser

To have an active FBLA or PBL chapter, it is necessary to have an enthusiastic adviser, one who is willing to spend time and energy in meeting the goals of the organization. In Utah, local advisers spend from under 5 hours per month to over 40 hours per month on chapter-related activities. Most advisers devote between 6 and 20 hours per month to FBLA or PBL.

35 National Handbook, p. 3.6.
The responsibilities of the local adviser are to:

1. Guide the officers in planning and leading chapter activities.
2. Attend all chapter activities.
3. Speak to other classes, schools, or community groups on the organization.
4. Encourage local members to participate in state, regional, and national conferences.
5. Keep members informed of state, regional, and national organizational news.

**Fund-Raising Activities**

Each local chapter needs funds in order to purchase items for the chapter or the school, to send delegates to conferences, and to supplement local dues. Members can learn much from conducting fund-raising projects including:

1. familiarization with business;
2. cooperation and teamwork in planning sales campaigns;
3. practical experience in selling; and
4. responsibility and money management.

Some of the more popular fund-raising projects for Utah FBLA and PBL chapters are: stationery/greeting cards, bake sales, raffle tickets, and clerical work.

Other projects suggested by Utah FBLA and PBL chapters include: novelties, dances, car washes, candle sales, candy sales, plaques, washing windows on Main Street, making posters for other school departments,
valentine sales, parade of homes, cleaning school grounds, concession stand, singing valentines, school activity night, doughnut and ice cream sales, taking inventory for local stores, Val-O-Grams, selling supplies for class work (paper and pencils), carnival booths, Senior Carnival, and selling flowers for National Secretaries Week.

Some chapters have found that donating a prize to the most successful salesperson serves as an incentive to all members in fund-raising activities.

FBLA and PBL approved fund-raising

Abigail Martin, Abigail Martin Service Centers. Distinctive candle collections and innovative programs.

Bright of America, 300 Greenbrier Road, Summersville, West Virginia 26651, 304/872-3000. Merchandise Kits.

Cherrydale Farms, 5320 Baltimore Avenue, Philadelphia, Pennsylvania 19143, 215/474-1009. Complete line of candies, including FBLA-PBL crunch and cholate bars.


Fresh Picked Fruit Services, P.O. Box 2266, Orlando, Florida 32802, 305/425-2241. Fresh Florida Fruit.

International Spice, Inc., 2346 Center Line Industrial Drive, St. Louis, Missouri 63141, 314/432-2100. Spices and spice grinders.


Schaper/St. Croix Corporation, 9909 South Shore Drive, Minneapolis, Minnesota 55441, 612/554-9161. Bicycle flags.

Town & Country Linen, 295 Fifth Avenue, New York, New York 10001, 212/889-7911. Linen calendar towels and miscellaneous items.

Balfour Supply Service, 11722 Parklawn Drive, Rockville, Maryland 20852, 301/770-6375. FBLA-PBL jewelry, awards, etc.

Metal Decor, P.O. Box 3606, Springfield, Illinois 62705, 217/523-4564. Complete plaque and recognition program items.

**Promotion Activities**

Advertising the local chapter in the school and community is necessary for chapter growth and goodwill. Each chapter should make known the activities that are taking place during the year and interesting items concerning individual members.

**School promotion**

Through the publicity committee, most of the FBLA and PBL chapters of Utah actively promote the chapter within the school. The most popular forms of school publicity include bulletin boards and displays. Other promotion activities include articles in the school newspaper, speakers in other classes within the school, and projects at school career days.

**Community promotion**

Utah chapters promoting the chapter within the community advertise in the local newspaper, especially during Vocational Week. Other schools have used the radio or brochures for promotion. This type of promotion is essential and should not be overlooked when planning the year's budget and activities.
Service Projects

FBLA and PBL are founded on service, education, and progress. Service within the school and community, therefore, is essential for the successful chapter.

School service projects

Members can be of service to the school in many ways. Suggestions given by Utah chapters are:

1. clerical pool to perform work for teachers;
2. hosting business department Open House;
3. student typing service;
4. ushering at school functions;
5. assisting with school programs;
6. cleaning school trophy and display cases;
7. decorating school Christmas tree;
8. serving refreshments at school functions;
9. correcting test papers for high school vocational day;
10. planning joint programs with other youth organizations;
11. typing and duplicating programs for school events;
12. preparing bulletin boards which promote business careers.

Community service projects

Members can be of service to the community in many ways. Suggestions given by Utah chapters are:

1. soliciting funds for charitable organizations (i.e. March of Dimes Walk-a-Thon);
2. visiting children's homes, the elderly, or shutins;
3. subbing for Santa;
4. typing mailing lists for charitable organizations;
5. donating blood to the Red Cross;
6. Christmas carolling;
7. picking up litter in the community;
8. preparing a business department film-slide presentation;
9. preparing Christmas or Thanksgiving food baskets for needy families;
10. taking underprivileged children on outings.

Suggestions from Experienced Advisers

To New Advisers

Following is a list of suggestions from experienced Utah advisers to new advisers or those wishing to start a new chapter at their school.

1. Get the support of students, administration, and the community.
2. Talk with some experienced advisers and contact them for help.
3. Attend workshops to meet other advisers and to exchange ideas.
4. Be enthusiastic and display belief in the organization because you are a powerful influence on the chapter and potential members.
5. Get an early start by meeting with your officers before school begins in the fall.
6. See that strong leaders are elected as officers because they can really make the difference between an active and inactive group.
7. Try to involve the entire business faculty in planning and carrying out chapter activities; use two sponsors when possible.
8. Let the students do the planning— but be there to suggest and help. Plan interesting and varied programs (not all speakers or films) to stimulate and maintain student interest.

9. Get administrative approval immediately for projects planned.

10. Don't wait— plan activities early in the year.


12. Be sure the officers are willing to work hard and are enthusiastic about the organization.

**Evaluation of your Chapter**

During the year members should evaluate their activities, attitudes, and progress by taking stock of what they are doing and what they can do for improvement. Evaluation is a means of improving the quality of present work and gives a basis for future planning. Evaluation reports by members should be made in chapter meetings and discussed openly by all. Reports of this nature are not only interesting to the members, but may be given to the school's administrators as examples of the organization's work.

The following evaluation form may aid the local chapter in determining its strengths and weaknesses.

<table>
<thead>
<tr>
<th>Active Cooperation</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are our members interested, active, cooperative and informed?</td>
<td>3 2 1</td>
</tr>
<tr>
<td>Are our advisers referred to for advice?</td>
<td></td>
</tr>
<tr>
<td>Does each member appear or assist with a chapter activity during the year?</td>
<td></td>
</tr>
<tr>
<td>Is a real effort made to find the abilities of each member?</td>
<td></td>
</tr>
</tbody>
</table>

**Arizona State Handbook, p. 65-66.**
### Program of Work

- Are our activities based on FBLA-PBL purposes?  
- Does our chapter program of work make use of the state and national program of work?  
- Is our program of work organized so that it is easily understood by all members?  
- Is our program of work planned early in the year and are later activities carried out according to this plan?

### Good Advertising and Publicity

- How have we interpreted our FBLA program to the community and school?  
- Have we completed chapter activities which help strengthen the school in our community?

### FBLA-PBL Activities

- Is our chapter promoting training of students for the business world?  
- Have our activities helped our members grow in social grace?  
- Are our fund-raising projects educational and related to FBLA-PBL goals?

### Opportunity to Learn

- Is effective use made of materials available through the state and national offices?  
- Do chapter experiences provide opportunities for all members to develop leadership abilities?

### Democratic Cooperation and Understanding

- Have we promoted democracy and the development of creative leadership?  
- Are opportunities provided by the chapter for all members to learn to participate in group work?  
- Do the members clearly understand FBLA-PBL goals, objectives, and values?  
- Do our members recognize the opportunity for personal growth through FBLA-PBL?

### Completion of Work - A Successful Chapter?

- Are accurate reports kept on file?  
- Are necessary reports and dues sent promptly to the state office?
Do we participate and assume our responsibilities in the state organization? 

Did the projects of our chapter help us achieve the goals we set? 

Do we use what we learn from our evaluation for future plans? 

Rating Scale for Evaluation

<table>
<thead>
<tr>
<th>Rating</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>65-79</td>
</tr>
<tr>
<td>Average</td>
<td>40-64</td>
</tr>
<tr>
<td>Below Average</td>
<td>Below 40</td>
</tr>
</tbody>
</table>
STATE CHAPTER
History of Utah FBLA and PBL

The state chapter of FBLA and PBL was chartered in May 1971 through the efforts of Dr. Ted Ivari and Mr. Gary M. Lloyd. Since 1971, these two organizations have grown tremendously; in 1975 there were a total of 34 FBLA chapters and 8 PBL chapters in Utah.

During its first year, the following FBLA and PBL chapters were chartered: FBLA, Granite High School; Bonneville High School; Kearns High School; Cyprus High School; Murray High School; Ogden High School; American Fork High School. PBL, Utah Technical College/Provo; Utah State University.

In 1972, these chapters were added in Utah: FBLA, Cottonwood High School; South Summit High School; Pleasant Grove High School; East Carbon High School; Brighton High School; Ben Lomond High School; Uintah Basin Area Vocational Center; Davis High School.

1973 chapters of FBLA and PBL included: FBLA, Highland High School; South High School; Spanish Fork High School; West High School; Wasatch High School; Lehi High School. PBL, Weber State College; Southern Utah State College; Stevens Henager, Ogden.

In 1974, the following chapters were chartered: FBLA, East High School; Payson High School; Bingham High School; Delta High School. PBL, Snow College.

During the 1974-75 school year, these chapters were added: FBLA, Carbon High School; Skyview High School; Grand County High School; Hillcrest High School; Jordan High School; Logan High School; Provo High School; Uintah High School; Weber High School. PBL, College of Eastern Utah; Dixie College.
State Officer Duties

The most important requirements of a successful FBLA or PBL chapter are well qualified and dependable officers. Capable leaders will be able to conduct the business in a well-organized and acceptable fashion. Capable leaders will see that an effective program of work is carried out in the best interest of the individual members, chapters, schools, and communities. When electing state officers, candidates for each office should be measured according to their ability to perform the duties and responsibilities as listed on the following pages.

Elected state officers for Phi Beta Lambda are: President, Vice-President, Secretary-Treasurer, and Historian. The state Reporter is appointed by the President.

Elected state officers for the Future Business Leaders of America are: President, Secretary-Treasurer, Historian, Reporter, and State Committee Members.

Procedure for becoming a state officer

Before being considered as a candidate for a state office, the person must (a) be an active member of the local chapter; (b) hold or have held an elected office in his/her local chapter; (c) file an application with the state office; (d) be willing to accept the responsibilities of the office; and (e) have the support of the local chapter and school.

Prior to the State Leadership Conference, the state office will mail to each chapter adviser an application for state office. If the prospective
candidate meets the qualifications and is willing to accept the responsibilities, he/she should complete the application form and return it to the state office by the date indicated.

At the State Leadership Conference in April, candidates for each office are nominated at a general business meeting in a short speech delivered by another chapter member. The candidate at this time accepts the nomination in a short speech. Throughout the State Leadership Conference, candidates campaign through the use of posters, fliers, and booths.

Duties of state officers

President: The responsibilities of the state president are to: (1) develop a working knowledge of parliamentary procedure and preside over business meetings at the State Leadership Conference, Fall Leadership Conference, and State Executive Board meetings; (2) attend the Western Regional meeting, representing the Utah state chapter; (3) maintain a close working relationship with the State Chairman; (4) promote the local and state chapters and represent the Utah chapter at meetings and conferences of other organizations when approved by the State Chairman; (5) appoint officers or committees as necessary; (6) seek opportunities to explain the objectives and activities of FBLA/PBL to businesses, potential members, and other schools.

Vice President: The responsibilities of the state vice president are to: (1) develop a working knowledge of parliamentary procedure to preside over meetings in the absence of the state president; (2) assist the president in all duties assigned; (3) seek opportunities to explain the objectives and activities of the organization to businesses, potential members, and other schools.
Secretary: The responsibilities of the state secretary are to: (1) keep an accurate record of all business meetings and executive board meetings; (2) keep an accurate and up-to-date file of meeting minutes; (3) attend to all state chapter correspondence; (4) carry out all duties assigned by the president; (5) count and record votes at state meetings; (6) seek opportunities to explain the objectives and activities of the organization to businesses, potential members, and other schools.

Treasurer: The responsibilities of the state treasurer are to: (1) assist the state office in keeping accurate records of state funds; (2) give financial reports as designated; (3) prepare a budget for the year with the help of the executive board; (4) assist the president in all duties assigned; (5) seek opportunities to explain the objectives and activities of the organization to businesses, potential members, and other schools.

Historian: The responsibilities of the state historian are to: (1) keep an accurate and up-to-date record of all state organization events; (2) assist the president in all duties assigned; (3) seek opportunities to explain the objectives and activities of the organization to businesses, potential members, and other schools.

Reporter: The responsibilities of the state reporter are to: (1) promote communication between all local chapters within the state through the state newsletter; (2) urge all local chapters to send articles to the state newsletter, and the national publication in Washington, D.C.; (3) assist the president in all duties assigned; (4) seek opportunities to explain the objectives and activities of the organization to businesses, potential members, and other schools.
State Adviser Responsibilities

In Utah, there are two state advisers— one for FBLA and one for PBL. These advisers are appointed by the State Chairman and have the following duties:

1. Provide direction and give advice to state officers, local advisers, and local officers.
2. Serve on the Utah Board of Directors for FBLA-PBL.
3. Assist in conducting the FBLA-PBL Officer-Adviser Workshop held each fall.
4. Attend monthly state officer planning meetings and quarterly Utah Board of Directors meetings.
5. Assist in planning the regional leadership conference.
6. Aid in developing contest and event guidelines for the State Leadership Conference.
7. Aid in planning the State Leadership Conference including making room arrangements, locating proper equipment, judges, contest chairmen, etc.
8. Promote the organization to potential chapters.
9. Attend installation ceremonies for new chapters.
10. Attend the National Leadership Conference, serving as a chaperone for the Utah delegation and as a contest judge.
11. Work closely with the State Chairman in coordinating all FBLA and PBL activities for the year.
State Chairman Responsibilities

The FBLA-PBL state chairman is appointed by the national organization. Outlined below are some of the responsibilities which, in some cases, he may wish to delegate to other members of the state FBLA-PBL board of directors.

1. serves as liaison between national association and state FBLA-PBL board of directors.

2. serves as official representative of the state FBLA-PBL board of directors to the national association.

3. is responsible for bringing matters relative to the operation of the state chapter to the national executive director and the national FBLA-PBL Board of Directors.

4. is responsible for filing informational reports to the national office relative to internal revenue affairs.

5. is responsible for filing state FBLA-PBL chapter reports to the national office including budgeting and financial reports, membership, projects, and activities.

6. is authorized to appoint state advisers to FBLA-PBL student divisions.

State Leadership Conference

The State Leadership Conferences of both FBLA and PBL are held each spring. The Conference provides an exciting and challenging climax to the activities carried on by local chapters throughout the year.

National Handbook, p. 2.2.
The Conference is open only to local chapter members, advisers, and chaperones. Official entry forms and other conference information is mailed to each local adviser and must be returned by the deadline date.

Most of the Utah chapters send delegates to this Conference. Members expenses are usually paid through a combined effort of the individual and the chapter funds with some students receiving partial expenses from school districts or vocational funds. The advisers accompanying the members also combine expenses from various sources including the adviser, school district, vocational funds, or chapter funds.

Contests are held for two specific purposes: (1) to promote desirable local chapter activities; and (2) to capitalize on the respective interests and talents of the local chapter members.

Fall Leadership Conference

Each fall a workshop is held for all local advisers and their local chapter officers to aid in developing leadership qualities and to strengthen the local chapter programs. The newly-elected state officers are installed, "rap sessions" are held, fund-raising ideas and chapter projects are discussed, and speakers of interest are invited.

This workshop, held at a Utah mountain resort, gives the new officers an opportunity to become acquainted with the local chapter officers and to discover their problems and concerns pertaining to the organization.

Local advisers are given aids in promoting their local chapter and receive leadership direction from the State Advisers and State Chairman.
Utah Chapter Constitution

"Utah Chapter"

Future Business Leaders of America - Phi Beta Lambda, Incorporated

Article I - Name

The name of this organization shall be the Utah State Chapter of the Future Business Leaders of America - Phi Beta Lambda, Incorporated, hereinafter referred to as "the Chapter."

Article II - Purposes and Objectives

The Chapter is a subordinate organization of the Future Business leaders of America - Phi Beta Lambda (FBLA - PBL), Incorporated. As such, it is dedicated to furthering the purposes of FBLA - PBL, Incorporated, within the state of Utah.

Specifically, the Chapter is organized to serve youth and young adults enrolled in business programs. The programs of FBLA - PBL, Incorporated, and the Chapter are designed to be an extension of the instructional program and thus an integral part of the business curriculum. The specific purposes of the Chapter are to:

1. Develop competent, aggressive business leadership.

2. Strengthen the confidence of young men and women in themselves and their work.

3. Create more interest and understanding in the intelligent choice of business occupations.

4. Encourage young men and women in the development of individual projects and in establishing themselves in business.
5. Encourage young persons to improve the home and community.

6. Participate in worthy undertakings for the improvement of business and the community.

7. Develop character, prepare for useful citizenship, and foster patriotism.

8. Participate in cooperative effort.


10. Encourage improvement in scholarship and promote school loyalty.

11. Improve and establish standards for entrance into business occupations.

Provided that the Chapter shall not have any purpose nor engage in any activity which would be inconsistent with the status of an educational and charitable organization as defined in Section 501 (c) (3) of the Internal Revenue Code of 1954 or any successor provision thereto, and none of the said purposes shall at any time be deemed or construed to be other than the public benefit purposes and objectives consistent with such educational and charitable status. And provided further that the Chapter will not adopt purposes nor engage in any activity inconsistent with the purposes and policies of FBLA - PBL, Incorporated.

Article III - Membership

Section 1. The members of the Chapter shall be those members of FBLA - PBL residing within the state of Utah. Membership classes identical to those established by FBLA - PBL, Incorporated, shall be established by the Chapter. Such classes, together with the voting and other rights accruing to each, may be more specifically set forth in the ByLaws.
Section 2. The chapter may assess dues from the members additional to dues assessed by FBLA - PBL, Incorporated.

Article IV - Governing Authority

The Chapter shall be governed by a Board of Directors, which body shall act within the framework of this Constitution and the ByLaws and subject to the ultimate authority of the Board of Directors of FBLA - PBL, Incorporated. The composition of the Board of Directors, the qualifications, and the method of selection of its members, and the powers or duties of the Chapter Board of Directors shall be set forth in the ByLaws.

Article V - Officers

The Chapter shall have officers as designated in the ByLaws. The qualifications of officers, the method of their selection, and their respective powers and duties shall be set forth in the ByLaws.

Article VI - Divisions

The Chapter may establish student divisions corresponding to the student divisions of FBLA - PBL, Incorporated. The student divisions shall not adopt any purpose or policy nor engage in any activity inconsistent with the purposes of the Chapter or with any provision of this Constitution or the ByLaws of the Chapter or with any purpose or policy of FBLA - PBL, Incorporated. All governing authority of any such division shall be subject in all respects to the governing authority of FBLA - PBL, Incorporated, and the governing authority of the Chapter.

Article VII - Restrictions

Section 1. No part of the net earnings of the Chapter shall incur to the benefit of any member, sponsor, donor, creator, director, officer,
employee, or without limitation, any other private individual or to the benefit of any corporation or organization, any part of the net earnings of which incur to the benefit of any private individual; provided, this shall not prevent payment of reasonable compensation for services actually rendered to or for the Chapter in effecting its purpose.

Section 2. The Chapter shall not divert any part of its income or corpus to any member, sponsor, donor, creator, director, officer or employee; by lending any part of its income or corpus without receipt of adequate security and a reasonable rate of interest; by paying any compensation in excess of reasonable allowance for salaries, or other compensation for personal services actually rendered; by making any purchase of security or other property for more than adequate consideration for money or money's worth; by selling any substantial part of its securities or other property for less than adequate consideration for money or money's worth; or by engaging in any other transaction which either, directly or indirectly, results in such diversion of its income or corpus. The Chapter shall not make any accumulation of its income, unreasonable in amount or duration, or use any income for purposes other than the objects hereinbefore set forth or invest in any income in any manner as to jeopardize the fulfillment or carrying out of its objects. The Chapter shall not devote a substantial portion of its activities to carrying out propaganda or otherwise attempting to influence legislation, and in no event shall the Chapter engage in any legislative activities other than those in direct furtherance of the Chapter's stated objectives. The Chapter shall not participate in or intervene in any political campaign on behalf of any
candidate for public office. In general, the Chapter shall not act in any way or engage in any activity which might affect its right or the right of FBLA - PBL, Incorporated, to full tax exemption or the right of donors to the Chapter of FBLA - PBL, Incorporated, to full tax deduction for their contributions to the Chapter or FBLA - PBL, Incorporated, and the Chapter shall be so operated as to be entitled to and receive all tax exemptions, federal or local, which may from time to time be granted to charitable, scientific, or educational associations or foundations.

Article VIII - Relationships with FBLA - PBL, Incorporated

Section 1. As an integral part of FBLA - PBL, Incorporated, the Chapter shall have purposes and engage in activities consistent with the policies and activities of FBLA - PBL, Incorporated, and consistent with the organization's status as a charitable and educational organization as defined in Section 501(c) (3) of the Internal Revenue Code of 1954.

Section 2. In order to ensure compliance with Section 1 above, the Chapter shall engage in no activity without the prior approval of FBLA - PBL, Incorporated. The Chapter shall so often as requested by FBLA - PBL, Incorporated, submit reports of past activities, reports of proposed activities, and budgets for approval by FBLA - PBL, Incorporated. Thereafter the Chapter shall engage in only those activities and make only those expenditures of funds which have been so approved by FBLA - PBL, Incorporated.

Article IX - Dissolution

Upon dissolution, all the assets of the Chapter shall be and remain the assets of FBLA - PBL, Incorporated.
Article X - ByLaws

The Chapter may adopt ByLaws which shall be consistent with this Constitution. Such ByLaws may contain any provision necessary for the orderly administration of the Chapter and its affairs including, but not limited to, the governing authorities, officers, elections, and meetings; provided that should there be any inconsistency between this Constitution and the ByLaws, this Constitution shall prevail.

Article XI - State and Local Chapters

The Chapter may maintain such relationship with local chapters of FBLA - PBL, Incorporated, within the state of Utah as are from time to time approved by its Board of Directors. The Chapter may, in its discretion, apply to the Internal Revenue Service for a group tax exemption ruling on behalf of the local chapters within the state.

Article XII - Amendments

This Constitution is a uniform Constitution promulgated by FBLA - PBL, Incorporated, for adoption by its chapters and, as such, shall be unamendable without the express consent of FBLA - PBL, Incorporated. Should, in the opinion of FBLA - PBL, Incorporated, amendments be required for the purpose of qualifying or retaining qualification under Section 501(c)(3) of the Internal Revenue Code of 1954 or any successor provision thereto, such amendments, as promulgated by FBLA - PBL, Incorporated, will become a part of this Constitution with or without the consent of the Chapter or its members.
State Newsletter

A joint FBLA - PBL state newsletter is written and sent to all local chapters four times a year. Under the direction of the state Reporters for FBLA and PBL, information is gathered from local FBLA and PBL chapters concerning fund-raising efforts, school or community service projects conducted, special honors received by the chapter or individual members, local officers elected, and other information of interest.

The purpose of the newsletter is to increase communication and understanding between the chapters throughout the state, and local chapters are urged to send information to their state Reporter to be included in this newsletter.
WESTERN REGION
Western Regional Meeting

The Western Region is comprised of Arizona, California, Idaho, Nevada, Oregon, Utah and Washington.

Each fall a combined FBLA and PBL meeting is held in one of these states to which each state sends delegates. At these meetings, Western Region business is transacted in general meetings. These meetings are conducted under the direction of the FBLA and PBL Western Regional Vice Presidents. They send the greetings of the national office and give information from the national office to the conference delegates.

At this two-day meeting, speakers are heard, leadership training sessions are held, and the upcoming National Conference is discussed.

Each state is urged to send state officers, local officers, and other interested members to this fall meeting; and Utah is always well represented at the Western Regional meetings.


*Kentucky State Handbook for Phi Beta Lambda*. Frankfort: Department of Education, Bureau of Vocational Education, no date. (Mimeographed.)

Lloyd, Gary M., Utah State Chairman for FBLA and PBL. Personal Interview, November, 1974.


*Utah Chapter FBLA and PBL Directory 1974-75*, Compiled by the Utah State Board of Education. (Mimeographed.)


October 30, 1974

Mrs. Sandra Yelverton, Supervisor  
Business and Office Occupations Ed.  
State Department of Education  
State Office Building  
Montgomery, AL 36104

Dear Mrs. Yelverton:

Utah is in the process of developing an FBLA-FBL Handbook for use by local chapter advisors and officers.

If your state has developed a handbook of this type, or if you have related information that you feel might be helpful, we would appreciate receiving a copy of these materials. In turn, we would be pleased to send you a copy of our guide when completed.

Thank you for your assistance.

Sincerely,

GARY M. LLOYD, State Specialist  
Business and Office Occupations

Miss Diane Linn  
Graduate Student  
Business Education  
Utah State University

/pd

cc: Diane Linn
Appendix B

Please complete the following questionnaire based upon the activities of your FBLA or FBL organization for the last school year (1973-74). If a question is asked about which you have no basis for answer, please indicate this fact with a N/A (not appropriate). No specific school or individual will be identified in the final report of the findings.

1. What special qualifications for admittance to your student organization do you have?

   ( ) None
   ( ) Grade point average (specify) ________________________________
   ( ) Year in school (specify) ________________________________
   ( ) Courses enrolled in (specify) ________________________________
   ( ) Other (specify) ________________________________

2. What approximate percentage of the total membership attend each meeting?

   ( ) Under 20 percent      ( ) 60 - 80 percent
   ( ) 20 - 40 percent       ( ) 80 - 100 percent
   ( ) 40 - 60 percent

3. When are your meetings scheduled?

   ( ) During school activity hour
   ( ) During regularly scheduled class (specify) ________________________________
   ( ) After school (specify day and time) ________________________________
   ( ) Other (specify) ________________________________

4. How often does your student organization meet?

   ( ) Weekly
   ( ) Bi-monthly
   ( ) Monthly
   ( ) Other (specify) ________________________________

5. What is the amount of local dues?

   ( ) No charge
   ( ) Other (specify) ________________________________

6. What officers do your members elect? Please check all appropriate.

   ( ) President
   ( ) Vice President
   ( ) Secretary
   ( ) Treasurer
   ( ) Committee Chairmen (specify) ________________________________
   ( ) Other (specify) ________________________________
7. What types of programs does your chapter have at its regular meetings? Please check all appropriate.

( ) Business Meeting  ( ) Speakers
( ) Films  ( ) Skits
( ) Other (specify)

8. Does your chapter hold a year-end banquet?

( ) Yes  ( ) No

9. What types of money-making projects does your chapter conduct? Please check all applicable.

( ) None  ( ) dance
( ) stationery/greeting cards  ( ) clerical work
( ) raffle tickets  ( ) car wash
( ) bake sales  ( ) jewelry
( ) novelties  ( ) candles
( ) Other (specify)

Describe below any unique ways in which your chapter has conducted these projects.


10. What services does your chapter perform for the school? Please check all appropriate.

( ) None  ( ) clerical help to teachers
( ) school newspaper/yearbook  ( ) bulletin boards
( ) Other (specify)

11. What services does your chapter perform for the community? Please check all appropriate.

( ) None  ( ) Christmas carolling
( ) visit children’s homes  ( ) donate blood to Red Cross
( ) pick up litter  ( ) visit the elderly or shut-ins
( ) solicit funds for charitable organizations (March of Dimes Walk-a-Thon)  ( ) collect coupons, newspapers, etc.
( ) Other (specify)

12. In what ways do you promote the local chapter in your school? Please check all appropriate.

( ) None  ( ) school newspaper
( ) bulletin boards/displays  ( ) speakers in various classes
( ) Other (specify)
13. In what ways do you promote the local chapter in the community? Please check all appropriate.

( ) None
( ) television
( ) brochure
( ) Other (specify) ________________________________

14. Please check at what levels members participate other than the local level.

<table>
<thead>
<tr>
<th>Conferences/Meetings</th>
<th>District</th>
<th>State</th>
<th>Regional</th>
<th>National</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events (contests)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Election campaigns</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publications (state newsletter or Tomorrow's Business Leader)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (specify)</td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

15. By what means are members' expenses paid to attend state conferences? Please indicate the approximate percentage of the total dollar amount in each category.

( ) Individual Member _____%  ( ) Chapter funds _____%
( ) School District ______%  ( ) Vocational Funds _____%
( ) Other (specify) __________________

16. By what means are members' expenses paid to attend national conferences? Please indicate the approximate percentage of the total dollar amount in each category.

( ) Individual member _____%  ( ) Chapter funds _____%
( ) School District ______%  ( ) Vocational funds _____%
( ) Other (specify) __________________

17. What percentage of the adviser's expenses to state conferences is paid in each of the following categories?

( ) Adviser %  ( ) Chapter funds _____%
( ) School District _____%  ( ) Vocational funds _____%
( ) Other (specify) __________________
18. What percentage of the adviser's expenses to national conferences is paid in each of the following categories?

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adviser</td>
<td></td>
</tr>
<tr>
<td>School District</td>
<td></td>
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<tr>
<td>Chapter funds</td>
<td></td>
</tr>
<tr>
<td>Vocational funds</td>
<td></td>
</tr>
<tr>
<td>Other (specify)</td>
<td></td>
</tr>
</tbody>
</table>

19. Is there an additional salary paid to the chapter adviser over the stated teaching salary?

- Yes
- No

If YES, please check one of the following categories:

- $0 - $50
- $50 - $100
- $100 - $150
- $150 - $200
- Over $200

20. Is the teaching load of the chapter adviser reduced?

- Yes
- No

If YES, in what way?

21. Approximately how much time do you spend each month on chapter-related activities?

- 0 - 5 hours
- 6 - 10 hours
- 11-20 hours
- 21-30 hours
- 31-40 hours
- Over 40 hours

22. What recommendations would you make to the state organization for:

- a. additional state events (contests)
- b. other state-sponsored activities
- c. other recommendations

23. What recommendations do you have for teachers wishing to start an FBLA/FBL chapter at their school?

24. Please list any changes you would like to see made in the state Constitution and/or By-laws.
25. Please list any additional items you would like to see included in the Utah FBLA/PBL Handbook.
A handbook of the various activities for the FBLA and PBL organizations in Utah is being developed as a guide for local chapter advisers.

In order that this project might be completed to be meaningful to all chapter advisers and potential advisers in this state, we will need your assistance in filling out and returning the enclosed questionnaire. The questionnaire pertains to activities during the past school year, but please feel free to add any other first-hand information or recommendations you may have.

Please send a copy of your chapter's constitution and by-laws if they are available.

Enclosed is a self-addressed envelope for your convenience in returning the questionnaire. Please return the completed questionnaire by May 23. The results of this study will be available to you in the fall from the State Board of Education.

Thank you for your assistance.

Sincerely

Gary M. Lloyd
FBLA/PBL State Chairman

Diane K. Linn
Graduate Student
Utah State University

Enclosures