



Affiliated Geographic and  
Special Interest Group  
Manual<sup>©</sup>

January 2011

Oracle Applications Users Group<sup>TM</sup>

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Dear Volunteer Coordinator,

Thank you for your interest and support of the Oracle Applications Users Group™ (OAUG). This manual is a working document provided to you as a resource of information to assist you with the development and ongoing maintenance of an Affiliated Geographic (Geo) or Special Interest Group (SIG).

Affiliated Geos and SIGs offer OAUG members an additional forum for sharing information and networking regarding many Oracle Applications topics. Geo/SIGs provide additional means for collaboration and education through frequently scheduled meetings and seminars, group specific newsletters, individual group web sites, and the use of list servers. As such, the OAUG recognizes the importance of each affiliated group and the volunteer time and efforts to manage and maintain a successful group.

OAUG and Oracle® Corporation have a mutual interest: the continuous improvement of the Oracle Applications® software. Oracle personnel are eager to participate in and support OAUG and its affiliated groups. OAUG's independence from Oracle allows for frank and forthright feedback to Oracle on issues of concern to Applications users. It is important for affiliated groups to understand that OAUG's objective is to maintain positive and constructive lines of communication so opportunities for improvement of the application suite of products can be identified and achieved. As such, OAUG affiliated Geo/SIGs offer a valuable source of information to Oracle by providing feedback on product quality, patching, and upgrade strategies. Opportunities to assist Oracle in improving the communication of the product changes are endless and represent an important role in OAUG activities.

The following definitions, guidelines, outlines, and suggestions will assist you in your endeavor to start a new group as well as to maintain an existing group. The most benefit to improving your role is in networking with those who have experience in leading a successful group. You are encouraged to visit the OAUG Geo/SIG Web page to view a complete list of affiliated groups to contact the respective coordinators and to meet face to face during OAUG conferences. The OAUG maintains a current list of affiliated groups on the OAUG Web site at [www.oaug.org](http://www.oaug.org). You can also contact the OAUG Affiliate Communities team at +1 404.760.8195 for Geos and +1 404.760.8195 for SIGs or email us at [geo-sig@oaug.com](mailto:geo-sig@oaug.com) to obtain more information on existing groups, to discuss your ideas for a new group, or to address your specific interests.

On behalf of the OAUG, thank you for volunteering your time. Volunteers make it happen!

Sincerely,  
Kathleen Fauerbach  
2011 OAUG Global Geo/SIG Committee Chair



## ABOUT OAUG

The OAUG is a non-profit membership organization governed by a set of bylaws and through an elected board of directors comprised of current OAUG members representing the global user community. The OAUG has adopted and maintained the following mission statement, in which all goals, objectives, and decisions are based.

### **OAUG Mission Statement**

The mission of the Oracle Applications Users Group is to represent the interests of Oracle Applications users worldwide in securing the optimum use and ongoing development of the Oracle Applications products, in particular:

- To provide a forum for the sharing of information and experience on the selection, implementation, and effective use of Oracle Applications products;
- To maintain a mechanism for establishing, and communicating to Oracle Corporation, users' collective priorities for the future development direction and enhancement of Oracle Applications products, with the objective of ensuring their continuous improvement;
- To maintain a robust and effective worldwide communications channel with Oracle Corporation regarding the Applications; and
- To promote the optimum benefit-in-use of Oracle Applications by supporting education and training programs and events associated with their use; and through conferences, publications, and electronic meeting places dedicated to the Oracle Applications products.

### **Geographic and Special Interest Group Definitions**

The OAUG has two types of affiliated groups: Geographic User Groups (Geos) and Special Interest Groups (SIGs). Although each group may be similar in structure, each has a different scope and focus.

#### *Geographic User Groups (Geos)*

Geo members reside within a defined Geographic region and meet to facilitate networking among local and regional application users. Members discuss and share ideas concerning many diverse topics.

#### *Special Interest Groups (SIGs)*

SIG members share common interest concerning specific Oracle Application products, such as Finance, XML Publisher, Collaboration Suite, etc. SIGs may also represent a specific industry such as energy and utilities, aerospace and defense, or higher education. In addition, there are SIGs that focus on specific user communities like PeopleSoft, Oracle Retail, and Siebel. SIG members may be geographically dispersed. Some SIGs may be created to focus upon new Oracle Products or realignment with Oracle's product direction. Reassessment of existing SIGs will be made by the OAUG Geo/SIG Committee on a yearly basis.

The OAUG maintains a current list of affiliated groups on the OAUG Web site. To find the User Community information visit [www.oaug.org](http://www.oaug.org) and click the User Communities tab.



## THE OAUG GEO/SIG COMMITTEE

The OAUG Geo/SIG Committee's objective is to serve the global interests of OAUG affiliated groups. The OAUG Geo/SIG Committee supports international, national, and regional members throughout the world, and strives to provide consistent quality services and support to all affiliated groups regardless of their nature or location.

The committee is established under the direction and guidance of the bylaws of the OAUG. It is led by a Chair and a Co-Chair, and includes other interested volunteers within the Geo/SIG communities. The committee is responsible for setting policy and establishing guidelines that will assist Geo/SIGs in their mission, objectives, and purpose within the parameters of the mission and purpose of OAUG.

The OAUG Geo/SIG Committee is a vehicle of communication for a major portion of the Oracle Applications user community. As such, it works with Geo/SIG Coordinators to ensure group participation in providing a forum for the many interests within the user group community and problem solving efforts.

The OAUG requires OAUG membership for all OAUG Geo/SIG Committee members. As a member of the OAUG, you will become familiar with OAUG objectives, goals, policies, and procedures that will help you lead your group.

### **Committee Qualifications and Responsibilities**

OAUG Geo/SIG Committee members may be Coordinators of an affiliated Geo or SIG. The following qualifications and responsibilities apply to volunteers in these roles:

- Candidates must be current OAUG members in good standing.
- Candidates must work/reside in the region they wish to represent.
- Candidates should have knowledge of the region's customs and business practices and the issues facing that group.
- Candidates should have experience working with Oracle Applications.
- Candidates should ideally have a track record of volunteer activity in a related field.

Committee members should be able to assist with the following roles and activities in support of all Geo/SIG groups:

- Assisting volunteers to establish new groups.
- Assisting group coordinators to establish relationships in the region (e.g., with other Geo/SIGs, user groups, Oracle Corporation, vendors, etc.).
- Assisting with regular communications and follow up with groups to ensure compliance.

The OAUG Geo/SIG Committee is responsible for providing an enhanced conduit for communication of committee issues to the OAUG Board of Directors and of OAUG activities to the local coordinators.



**GEO/SIG AFFILIATION PROCESS**

OAUG requires that all affiliated groups, and members of affiliated groups, abide by OAUG’s bylaws and policies. Specifically, OAUG has defined strict policies against using OAUG members and conference attendee lists for recruiting purposes and prohibits any and all recruiting related activities at OAUG functions. For a current explanation of OAUG regulations and policies, please see the OAUG Web site at [www.oaug.org](http://www.oaug.org). For questions regarding OAUG policies, contact OAUG at +1 404-240-0897.

OAUG will not accept or approve a Geo/SIG affiliation agreement with a group that is also affiliated with another recognized applications users group. The OAUG Geo/SIG Committee will consider other forms of partnerships with such groups that do not include the affiliation benefits and services provided through OAUG.

Re-affiliation is required on an annual basis. The re-affiliation process includes submission of an updated affiliation form to the OAUG.

**Geo Affiliation Process**

In general, new Geos affiliation requests will only be approved for regions where there is currently no coverage by an existing Geo. OAUG will facilitate the introduction and redefinition of the applicant group and existing group, should this action be warranted. In this case, the applicant group would become part of the existing Geo and operate under that group’s umbrella. A map of OAUG Geos is located at <http://www.oaug.org/usercommunities/geosandsigs/geos.html>.

To request affiliation, complete the appropriate form and submit it to the Geo/SIG Committee. Forms are available on the OAUG Web site, or by contacting [geo-sig@oaug.com](mailto:geo-sig@oaug.com). Each group must have a designated Coordinator, and a secondary contact person (see roles/responsibilities in the “Charter/Bylaws/Leadership Roles” section of this manual). Upon Geo/SIG Committee review and approval, all new Geos are granted affiliated status pending achievement of affiliation agreements.

**OAUG expects all GEOs to meet the following requirements:**

Requirement	OAUG Assistance Available
1. Adopt/Review written bylaws, which provide for the administration and regulation of internal operations and do not materially conflict with the bylaws of the OAUG. <b>Geo will provide a copy of bylaws to OAUG for review and approval.</b>	OAUG can provide a bylaws template that can be customized as necessary by the Geo.
2. Utilize the OAUG Calendar application to schedule Geo events.	Meetings can be added to the Geo/SIG Calendar through the “Manage your user groups” navigation on the OAUG website. The OAUG Event Registration system may also be utilized. Events posted on the OAUG calendar will also be



	<p>added to the Oracle events calendar. More details about the Calendar and other aspects of the User Community Support System are available in the Geo/SIG Coordinator Resources section of the OAUG Web site. An OAUG staff or Board member may attend to provide OAUG updates and membership information, or membership materials may be provided for distribution.</p>
<p>3. Maintain a Web site, updated at least once per quarter during the calendar year. The website <u>home page</u> will include the approved version of the “OAUG affiliate” logo, identifying it as an OAUG Geo group, as well as all written electronic or paper documentation produced by the group. It will also include upcoming event information and a link to the OAUG Web site on its subsequent pages.</p>	<p>OAUG provides a Web portal that Geos can customize and update with content for their individual group without having HTML knowledge. Web site hosting is also available through OAUG.</p>
<p>4. Use the OAUG provided online Geo/SIG membership application to collect and manage Geo member contact information or provide a copy of membership list to OAUG once a year.</p>	<p>OAUG provides an online membership application at no cost.</p>
<p>5. Hold Geo officer elections at least every 2 years. The Geo/SIG Committee will assign one of its members to follow up on the election process. At the most, half of the elected Geo Board officers can be employed by the same organization. List of elected officers will be posted on Geo’s web site along with contact information and date for the next Board election.</p>	<p>OAUG can assist by providing sample call for candidate, election timeline, position descriptions and other documents. OAUG can also provide some administrative support to conduct elections.</p>
<p>6. Appoint or elect a Geo Coordinator who will act as the main contact between the Geo and OAUG. The Geo Coordinator must be a current member of OAUG and agree to be responsible for communicating all OAUG info (membership, events, etc.) to Geo members. Group Coordinator has to reside in the GEO area. All exceptions must be approved by the GEO/SIG Committee.</p>	<p>An OAUG membership provides the Geo coordinator with information and insight into the OAUG organization. Membership also ensures a consistent message is shared between the affiliated group, its members, the coordinator, and the Geo/SIG Committee.</p>
<p>7. Geo must host one meeting per calendar year.</p>	<p>This meeting is in addition to the face-to-face meeting held at COLLABORATE.</p>



<p>8. All events and notifications for events will have the approved version of the “OAUG affiliate” logo noted on all Communications.</p>	<p>OAUG offers online event registration form, marketing of meeting in bi-monthly eNews and the online Geo/SIG meeting calendar. Meeting Management services are also offered for a fee.</p>
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**Geo Compliance Requirements:**

- **Submit a group re-affiliation form on a yearly basis (see attached)**
- **Maintain a Web site, updated at least twice yearly, to include upcoming event information, approved version of the “OAUG affiliate” logo and link to OAUG Web site**
- **Use the OAUG provided online Geo/SIG membership application to collect and manage member contact information OR provide a copy of membership list to OAUG at least once per year.**
- **Appoint or elect a GEO Coordinator who will act as the main contact between the SIG and OAUG. The GEO Coordinator must be a current member of OAUG and agree to be responsible for communicating all OAUG info (membership, events, etc.) to GEO members.**

OAUG will monitor affiliation compliance for all Geos throughout the year. In the case of identified non-compliance, the following procedure will be followed:

- The Geo/SIG Committee will contact any Geo Coordinator that is out of compliance, discuss the issues and offer guidance to help meet affiliation requirements.
- In case issues are not resolved within a month, the GEO board members will be contacted. Should the group express sincere intent in correcting the non-compliance issue, the committee will grant an additional grace period. Affiliation benefits may be withheld during this period including the comp pass to OAUG annual conference, the comp pass to Oracle OpenWorld and OAUG grant funding.
- If the issue is un-resolved beyond the grace period, the OAUG may withdraw affiliation benefits and/or terminate the group’s affiliation at the discretion of the Geo/SIG Committee.

**Maintaining Geo Affiliation**

The affiliation requirements listed above must be adhered to on an annual basis by submitting the updated affiliation document. In addition, we request that Geos follow the guidelines below:

*Membership*

- Each group should have at least ten active members, representing a good cross-section of companies to maintain affiliated status. In addition, a 60:40 user/associate member ratio is encouraged.
- Encourage and promote OAUG membership and events at all meetings
- Membership and attendance at any affiliated Geo meeting must be open to all OAUG members and non-members alike.

*Operations*

- Follow and uphold all OAUG policies and procedures.
- Advise OAUG Geo/SIG staff of any changes in contact information for primary and secondary group contacts.



- Maintain group records and meeting minutes in accordance with the by-laws
- Encourage and facilitate volunteer committee participation and development

*Meetings*

- Forward meeting attendance list of OAUG to assist with our marketing efforts if the OAUG online registration application was not used.

**SIG Affiliation Process**

In general, new SIG affiliation requests will only be approved where there is currently no product family coverage by an existing SIG. OAUG will facilitate the introduction and redefinition of the applicant group and an existing group, should this action be warranted. In this case, the applicant group would become part of the existing SIG and operate under that group's umbrella. A current list of OAUG SIGs is located at

<http://secure.meetingexpectations.com/oaug/groups/GroupList.aspx?type=1001&name=SIG>.

The OAUG Geo/SIG Committee reserves the right to review on an annual basis the SIG's focus and re-alignment with Oracle products.

To request affiliation, complete the appropriate affiliation request form and submit to the Geo/SIG Committee. Forms are available on the OAUG Web site, or by contacting [geo-sig@oaug.com](mailto:geo-sig@oaug.com). Each group must have a designated group Coordinator, and a secondary contact person (see roles/responsibilities in the "Charter/Bylaws/Leadership Roles" section of this manual). Upon Geo/SIG Committee review and approval, all new SIGs are granted affiliated status pending achievement of affiliation agreements.

**OAUG expects all SIGs to meet the following requirements:**

Requirement	OAUG Assistance Available
1. Adopt/Review written bylaws, which provide for the administration and regulation of internal operations and do not materially conflict with the bylaws of the OAUG. SIG will provide a copy of bylaws to OAUG for review and approval.	OAUG can provide a bylaws template that can be customized as necessary by the SIG.
2. Utilize the OAUG Calendar application to schedule Geo events.	Meetings can be added to the Geo/SIG Calendar through the "Manage your user groups" navigation on the OAUG website. The OAUG Event Registration system may also be utilized. Events posted on the OAUG calendar will also be added to the Oracle events calendar. More details about the Calendar and other aspects of the User Community Support System are available in the Geo/SIG Coordinator Resources section of the OAUG Web site. An OAUG staff or Board member may attend to provide OAUG updates and membership information, or membership



	materials may be provided for distribution.
3. Maintain a Web site, updated at least once per quarter during the calendar year. The website <u>home page</u> will include the approved version of the “OAUG affiliate” logo, identifying it as an OAUG SIG group, as well all written electronic or paper documentation produced by the group. It will also include upcoming event information and a link to the OAUG Web site on its subsequent pages.	OAUG provides a Web portal that SIGs can customize and update with content for their individual group without having HTML knowledge. Web site hosting is also available through OAUG.
4. Use the OAUG provided online Geo/SIG membership application to collect and manage SIG member contact information or provide a copy of membership list to OAUG at least once per year.	OAUG provides an online membership application at no cost.
5. Hold SIG officer elections at least every 2 years. The Geo/SIG Committee will assign one of its members to follow up the election process. At the most, half of the elected Geo Board officers can be employed by the same organization. List of elected officers will be posted on Geo’s web site along with contact information and date for the next Board election.	OAUG can assist by providing sample call for candidate, election timeline, position descriptions and other documents. OAUG can also provide some administrative support to conduct elections.
6. Appoint or elect a SIG Coordinator who will act as the main contact between the SIG and OAUG. The SIG Coordinator must be a current member of OAUG and agree to be responsible for communicating all OAUG info (membership, events, etc.) to SIG members.	An OAUG membership provides the SIG coordinator with information and insight into the OAUG organization. Membership also ensures a consistent message is shared between the affiliated group, its members, the coordinator, and the Geo/SIG Committee.
7. SIG must participate in their Areas of Focus in obtaining content, the voting process and session scheduling for OAUG COLLABORATE annual conferences, or host a SIG meeting at the event. All events and notifications for events will have the approved version of the “OAUG affiliate” logo noted on all communications.	OAUG Education Committee and Conference Committee will provide assistance and guidance.



<p>All events and notifications for events will have the approved version of the “OAUG affiliate” logo noted on all communications.</p> <p>8.</p>	
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**SIG Compliance Requirements:**

- **Submit a group re-affiliation form on a yearly basis (see attached)**
- **Maintain a Web site, updated at least twice yearly, to include upcoming event information, approved version of the “OAUG affiliate” logo and link to OAUG Web site**
- **Use the OAUG provided online Geo/SIG membership application to collect and manage member contact information OR provide a copy of membership list to OAUG at least once per year.**
- **Appoint or elect a SIG Coordinator who will act as the main contact between the SIG and OAUG. The SIG Coordinator must be a current member of OAUG and agree to be responsible for communicating all OAUG info (membership, events, etc.) to SIG members.**

OAUG will monitor affiliation compliance for all SIGs throughout the year. In the case of identified non-compliance, the following procedure will be followed:

- The Geo/SIG Committee will contact any SIG Coordinator that is out of compliance, discuss the issues and offer guidance to help meet affiliation requirements.
- In case issues are not resolved within a month, the SIG board members will be contacted. Should the group express sincere intent in correcting the non –compliance issue, the committee will grant an additional grace period.
- If the issue is un-resolved beyond the grace period, the OAUG may withdraw affiliation benefits and/or terminate the group’s affiliation at the discretion of the Geo/SIG Committee.

**Maintaining SIG Affiliation**

The affiliation requirements listed above must be adhered to on an annual basis by submitting the updated affiliation document. In addition, we request that SIGs follow the guidelines below:

*Membership*

- Each group should have at least ten active members, representing a good cross-section of companies to maintain affiliated status. In addition, a 60:40 user/associate member ratio is encouraged.
- Encourage and promote OAUG membership and events at all meeting
- Membership and attendance at any affiliated SIG meeting must be open to all OAUG members and non-members alike. .



### *Operations*

- Advise OAUG Geo/SIG staff of any changes in contact information for primary and secondary group contacts.
- Maintain group records and meeting minutes in accordance with the by-laws
- Follow and uphold all OAUG policies and procedures.
- Encourage and facilitate volunteer committee participation and development

### **Group Conflicts & Overlapped Focus**

- If a new group forms with an overlapping focus or in the same area, the existing group takes precedence with OAUG, unless the existing Geo/SIG agrees to share focus or the OAUG has approved the new group's specific focus through Oracle's guidance.
- If a New Geo/SIG Affiliation Form is received from a Geographic region where a current affiliated group already exists, the OAUG will facilitate the introduction and redefinition of the new and existing groups, should this action be warranted.
- If a new group is being formed with a non-Oracle employee as a coordinator, while an Oracle employee had previously coordinated the existing group, the OAUG will assist in transitioning of the combined group.

### **Group Name Change**

If an approved group requires a name change, at any point after it has already established itself as an affiliated OAUG Geo/SIG group, it will complete and submit the formal request Name Change Form (see Coordinator's website for form) to the Geo/SIG Committee before the name change is official and communicated to its membership. . The formal request should include the reason for the change and the benefit to its members. To request a Group Name Change, complete the appropriate Group Name Change form and submit to the Geo/SIG Committee. Forms are available on the OAUG Web site, or by contacting [geo-sig@oaug.com](mailto:geo-sig@oaug.com).

### **Other Provisions**

- OAUG will not accept or approve a Geo/SIG affiliation agreement with a group that is also affiliated with another recognized applications users group. The Geo/SIG Committee will consider other forms of partnerships with such groups that do not include the affiliation benefits and services provided through OAUG.
- The Geo & SIG are separate legal entities from OAUG, and neither the group nor its officers, agents or employees may hold themselves out as an agent of OAUG. Geo & SIG shall not contract in the name of OAUG, or incur any financial or other obligations on behalf of OAUG without express written consent of the OAUG Board of Directors. Geo & SIG may identify itself to the public as "affiliates" of OAUG, but may not hold itself out as OAUG, including when speaking to press (See OAUG PR Policy, Addendum 1).
- OAUG is the exclusive owner of the "Oracle Applications Users Group" name, the acronym "OAUG" and the OAUG logo. Affiliated Geo will have the non-exclusive right to use these trademarked names/logos strictly in accordance with the Graphic Standards and Use Guidelines that are available from the OAUG upon request.
- OAUG and SIG/Geo will share mutual confidentiality of information with the provision that the OAUG can use SIG & Geo membership information for OAUG related business and communication. The SIG & Geo will not sell any membership information, or use or distribute the information for marketing, recruiting or any other non-SIG/Geo related business.



- OAUG reserves the right to add amendments to clearly define any issue where clarity is needed.

## CHARTER/BYLAWS/LEADERSHIP ROLES

The following information will assist you with establishing a charter, bylaws and determining leadership roles and responsibilities for your group.

### **Establish a Charter**

Clarify the purpose of the group in a charter. A charter is a paragraph or two that describes the purpose of the group and its areas of focus. For example, here is the charter of the OAUG Database SIG

*“The OAUG Database SIG will address topics relevant to the installation, configuration, implementation, maintenance, and continued support of Oracle Applications databases. In so doing, the OAUG Database SIG will work to improve processes, documentation, software, and other items related to the above objectives through active participation in the Oracle enhancement process, development of materials and programs, the exchange of information, and other activities.”*

A group’s charter is a working document that will evolve over time to the changing market conditions and its member interests. An annual review of your group’s charter and objectives is recommended.

### **Sample Bylaws**

Bylaws are important in ensuring the successful operations of your Geo/SIG. Items that should be address by your group’s bylaws include:

- Group Name & Purpose
- Membership - qualifications, etc.
- Board of Directors - including number of members, qualifications to serve on the board, election process, duties, handling vacancies/resignations and termination procedures
- Process for forming committees
- Process for amending bylaws

The OAUG can provide your affiliated group with a sample bylaws document. From this you can tailor a set of bylaws to meet the needs of your group, keeping in mind that affiliated groups must operate within the OAUG bylaws. Bylaws must be voted upon by the user group members prior to or during the first membership meeting. Each user group may determine the process for bylaw ratifications after initial approval.

A sample is available in the Coordinator Resource section of the OAUG web site, or by emailing [geo-sig@oaug.com](mailto:geo-sig@oaug.com). In addition, many established groups have their bylaws posted on their Web site, or would be willing to share them with you.



## **Leadership Roles**

The OAUG encourages each group to define an organizational structure to accommodate their individual focus and needs. The following suggested roles and responsibilities provide an outline for volunteer positions for established and mature groups. These can be modified to meet the needs of your group and are not necessarily conclusive or exclusive of the roles and responsibilities determined by the leadership of each group.

### ***Group Coordinator/Chair***

The Coordinator will function as the spokesperson for this group and as such is an important representative of the group and the OAUG. Coordinators should meet the following qualifications:

- It is required that a group coordinator be a member of the OAUG. An OAUG membership provides the coordinator with information and insight into the organization. Membership also ensures a consistent message is shared between the affiliated group, its members, the coordinator, and the Geo/SIG Committee.
- A basic understanding of OAUG goals, objectives, policies and procedures.
- A working knowledge of Oracle Applications, the user community industry, and the needs thereof.
- Basic knowledge or experience working with volunteer membership organizations.
- The initial group coordinator may be an Oracle employee for a period not to exceed one year. OAUG encourages user members to lead all user-group activities.
- OAUG recommends that one person acts as Coordinator for only one Geo or SIG.

### ***Group Coordinator Responsibilities***

Knowing the responsibilities necessary for the successful development of a group will help you to determine the volunteer time commitment required. The following is a high level summary of the responsibilities and duties deemed necessary for the successful management of an affiliated Geo/SIG.

- Maintain group records and meeting minutes in accordance with the by-laws.
- Uphold all OAUG Policies and Procedures.
- Promote OAUG Membership and events to group members.
- Encourage volunteer activity and development.

## ***Other Leadership Positions***

### **Co-Chairperson**

The Co-Chairperson is responsible for assisting and supporting the Chairperson in all capacities, as well as assuming the responsibilities of the Chairperson if he/she should be unavailable. The Co-Chairperson also may identify one or more objectives for the group to focus during his or her term. For example, a Co-Chairperson may dedicate his or her efforts to increasing the group's membership or improving meetings and participation.



### **Treasurer (Mainly for GEOs)**

The Treasurer is responsible for the receipt, maintenance, and disbursement of all funds of the group. The Treasurer may appoint one or more Assistant Treasurers to perform, under the direction of the Treasurer, some of the duties of the Treasurer.

### **Secretary**

The Secretary is responsible for recording and documenting information discussed and decided upon at all meetings, publishing meeting minutes, managing the action item list, and maintaining all other documents. For SIGs, the Secretary may also be another board member responsible for the management and maintenance of membership lists, unless the group determines the need for a separate Membership Chairperson.

Another approach to a leadership board divides responsibilities a bit differently: **President, Vice President, Membership Director, and Program Director**. In this configuration, the President and Vice President roles are the same as the Coordinator and Co-Chairperson described in the previous scenario. The Program Director is specifically responsible for meeting planning, including identifying and working with sponsors and speakers. The Membership Director is responsible for all communication with members, maintains the membership list and coordinates communication with OAUG.

In a smaller or new group, four positions may be all that is needed to keep the group running smoothly, particularly if there are volunteers that participate as needed. As the group grows, more organization is necessary and it is beneficial to assign specific areas of responsibilities to additional leadership personnel. Examples include:

### **Newsletter Editor (Optional)**

The Newsletter Editor is a volunteer who is responsible for managing the publication of a quarterly Geo/SIG newsletter and handling submissions from the community to OAUG publications including, but not limited to the *Insight* magazine and OAUG e-News. The Newsletter Editor may solicit assistance from other members to form a newsletter staff.

### **Group Administrator**

The Group Administrator is responsible for the development and maintenance of the OAUG Geo/SIG Web site, as well as other communication mechanisms such as a List Server, email server, and other means of communication among members. He or she may solicit assistance from other members to form a communications staff.

### **Meeting Planner (Optional)**

The Meeting Planner is responsible for the scheduling, planning, and coordination of all Geo/SIG meetings and other scheduled activities such as conference calls. This may include quarterly meetings, meetings at OAUG conferences, and more frequent regional meetings.

### **Past Group Coordinator**

This position provides consistency and experience to the group over time. This officer will assist the Coordinator and Co-Chairperson in all capacities and offer advice regarding the Geo/SIG endeavors. The Past Group Coordinator does not have to be the Coordinator who served in the immediate prior term, but rather could be any former Coordinator.



## Oracle Liaison

The Oracle Liaison is an employee of Oracle Corporation who has responsibilities associated with the focus of the Geo/SIG and is interested in the topics addressed by this group. This individual acts as a resource to the Geo/SIG by providing a direct contact within Oracle to obtain answers to questions or concerns related to Oracle Corporation and software, assisting with obtaining Oracle resources to participate in meetings, and providing overall support of the group functions from Oracle Corporation.

## AFFILIATED GROUP BENEFITS/PROGRAMS/SERVICES

OAUG continues to evaluate ways in which to assist our affiliated groups with their ongoing activities. These benefits are reviewed frequently to meet the changing needs of our groups. However, some of the benefits may change. Please contact the OAUG and/or the GEO/SIG committee to verify availability. Following is a summary of current benefits/programs/services:

- Geo/SIG Funding
- Meeting Planning and Support Services\*
  - Registration management services
  - Site selection/contract negotiation
  - Exhibitor/sponsor management
  - Event marketing and communications
  - Overall logistics management
  - Onsite management
  - Financial management
  - Complementary meeting space at OAUG Conferences
  - Assistance with identifying speakers
  - Assistance accessing Oracle for speakers, presentations
  - E-mail Blast Service
- OAUG access
  - OAUG Liaison
  - eLink Newsletter
  - OAUG Membership Materials
  - Quarterly Conference Calls
- Programs for your group
  - Certificate of Distinction Award
  - Election Assistance and Support
  - Event Liability Insurance (domestic only)\*
- Web Site Assistance
  - OAUG Website Manager
  - Web site hosting
  - User Community Support System
    - Online membership application
    - Online registration application
    - Geo/SIG online calendar
  - Listserver Service\*



\* Fees associated with benefit

## Geo/SIG Funding

For the latest funding information available from the OAUG for Geo/SIG groups, please see the separate funding guidelines procedure available on the Coordinator's webpage.

## Meeting Planning and Support

### Recommendation from OAUG's Geo/SIG Committee regarding Oracle's new policy – Sharing of Event Attendee Lists

The OAUG is aware that Oracle requires user communities to provide their meeting attendee contact lists to those local **Oracle Field Marketing Services** groups who provide support to GEOs in order to receive support with speakers, sponsorships, participation, funding, etc.

If your group is planning to utilize support from **Oracle Field Marketing Services** for your event(s), the OAUG recommends that, in order to abide by the OAUG privacy policy, you must notify the meeting attendees in advance, or on the on site event sign-in sheets, that their contact information will be provided to Oracle Corporation. Only the attendees should make the decision to share their contact information. The procedure should be applied to any vendor requesting the sharing of such information.

The OAUG does realize that some groups share their lists with Oracle currently and for those groups that currently do not, the recommendation would be the following:

- If you are not getting any support from **Oracle Field Marketing Services**, this policy should not affect you in any way.
- If you plan to get support from **Oracle Field Marketing Services** for your upcoming events and you do NOT consider this to be an issue
  - Make your user community aware of the new policy immediately before providing their contact information to Oracle.
- If you plan to get support from **Oracle Field Marketing Services** for your upcoming events AND consider this to be a potential issue
  - Make your user community aware of the new policy immediately
  - Poll your user community and try to find out if this would prevent them from attending
  - Increase your uses and partners participation to cover the gap created by Oracle's absence, if necessary.

If your group feels this policy will negatively impact the attendance and success of your events, please let OAUG know your specific concern(s), so the OAUG Geo/SIG Committee can approach Oracle and clarify what **Oracle Field Marketing Services** will and will NOT do with the attendee information.

Each Geo or SIG can decide their policy on their own. The OAUG Geo/SIG Committee will support your position regardless. Please keep in mind, adhering to this policy will ensure a good relationship with **Oracle Field Marketing Services**, which is a better scenario for all groups.



OAUG is available to assist you with planning your group meetings. To make your meetings a success, we offer the following assistance:

*Meeting Planning and Support Services\**

- Registration management services
- Site selection/contract negotiation
- Exhibitor/sponsor management
- Event marketing and communications
- Overall logistics management
- Onsite management
- Financial management
- Help with securing speakers from Oracle
- Access to OAUG Vision Database for Training
- Hosting of Meetings at local Oracle offices
- OAUG membership collateral and giveaways for meetings
- Marketing of meetings on OAUG Web site and in publications

\*Fees associated with some services

*OAUG Conference Meeting Space*

SIGs and Geos are provided complimentary meeting space at all OAUG Conferences. Requests for meeting space are sent to the Geo and SIG coordinators prior to each conference. The available meeting space fluctuates for each conference venue and is reserved for those groups who meet reservation requests and material deadlines within established timelines. SIGs and Geos requesting meeting space must also meet requirements for a complimentary pass to be issued.

*Blast e-Mail Service*

OAUG provides e-mail services to assist Geos/SIGs with group mailings. E-mail can be an excellent means of advertising your meetings and raising interest in your group. For more information on e-mail services, please send an e-mail requesting more information to [geo-sig@oaug.com](mailto:geo-sig@oaug.com).

\*Please note that if you use data from the OAUG membership database, you are limited to one email blast per quarter.

**OAUG Access**

Geo and SIG Coordinators have access to OAUG through the Geo/SIG Coordinator Resources page on the OAUG website. This section of the website includes information to assist you in managing your group, developing meeting agendas, and staying current with what is going on within OAUG in general. In addition, all forms and detailed benefit/program information is available via this page.

To access the Coordinator Resources page:

1. Login at [www.oaug.com](http://www.oaug.com)
2. Click on the "User Communities" tab
3. Click on the Geos/SIG tab
4. Click on the Coordinator Resources tab



### *OAUG Liaisons*

OAUG has implemented a Geo/SIG Liaison program in which one of our Board of Directors or Geo/SIG Committee members acts as an additional contact for the affiliated groups. The liaison will contact your group twice a year for an update on current initiatives and special needs. Regular operational issues/questions should still be directed to the OAUG Geo/SIG Committee or the OAUG Affiliate Communities Manager.

### *Quarterly Coordinator Conference Calls*

Four times a year, the OAUG Geo/SIG Committee hosts a conference call open to all Geo and SIG coordinators or their representatives. This is an opportunity for coordinators to hear what is going on in OAUG, as well as hear what other groups may be doing. Notification of this meeting is sent to all coordinators in advance of the call. OAUG requests that at least one representative from each affiliated group participate on each call so they may relay the information back to the group leadership team.

## **Programs for your Group**

OAUG sponsors a number of programs designed to recognize your group and your volunteers:

### *Certificate of Distinction Award Program*

This annual award program was developed to recognize Geos and SIGs that have achieved excellence in partnering with OAUG to support OAUG's mission and goals. This honor is significant, as it signals the dedication, commitment and spirit of the volunteers who play such an integral part in making the OAUG "The Knowledge Base for Oracle Applications Users". The award also benefits the Geo/SIGs in the following ways:

- Assists in charting the history and progress of your Geo/SIG
- Can be used as a new member recruitment tool
- Gives volunteers an opportunity to work toward a common goal
- Helps increase enthusiasm and motivation within the current membership
- Provides a sense of pride, as the members can actually "see" the Geo/SIGs efforts and results being recognized on an international basis

To be considered for the award, groups complete and submit an application form covering areas including Group Operations, Training, Education & Networking, and Promotion/Partnership with OAUG. Applications are available in the Coordinator Resources section of the OAUG website for completion and submittal. Awards are presented at the annual OAUG COLLABORATE conference, and include a Certificate of Distinction seal that can be used on your website and on your materials.

### *Election Assistance / Support*

OAUG can provide your group with assistance in holding electronic and paper ballot elections.

Assistance and support include

- Call for Nominations
- Compilation of the Ballot
- Vote Tally and Verification



- Election Announcements and Reminders

For more information on election assistance and support, please contact [Geo-sig@oaug.com](mailto:Geo-sig@oaug.com).

### **Web-Related Services and Benefits**

#### *User Community Web Site Manager*

The OAUG User Community Web Site Manager has been built to allow affiliated user communities (Geographic and Special Interest Groups) to create and manage professional looking web sites without needing to understand HTML programming. The Web Site Manager and the site hosting are offered at no cost to Geos and SIGs.

Affiliated Geo/SIG web pages are linked to the OAUG web site and provide current and accurate information to our members and the Oracle Application user community. To ensure that the information is current and accurate, the OAUG Geo/SIG Committee requests that all Geo and SIG web sites be updated at least twice annually.

Detailed information regarding the functionality of the User Community Web Site Manager, and the application, are included in the Coordinator Resources section of the OAUG Web site, or contact [geo-sig@oaug.com](mailto:geo-sig@oaug.com).

#### *Web Site Hosting*

OAUG also offers free Web site hosting to user groups separately from the Web Site Manager. An example of a URL hosted with OAUG is <http://SIGname.oaug.org>. To sign up for hosting independently from the User Community Web Site Manager please email [geo-sig@oaug.com](mailto:geo-sig@oaug.com) or visit the Coordinator Resources page on the OAUG Web site.

### **User Community Support System**

#### *Online Membership Application*

The purpose of the application is to provide a common, online process for OAUG members and non-OAUG members to sign-up as members of an affiliated Geo or SIG. Once contact information is captured, it is stored in a contact database that is accessible to the respective coordinators, and the association's Geo/SIG committee.

The OAUG contact database currently captures contact information for both members and non-members. Each contact in the OAUG database has its own "profile," through which they can register for events, submit a presentation, sign-up for membership, or perform other functions related to OAUG. This existing functionality has been extended to add Geo/SIG membership application capabilities.

#### Benefits to Geo/SIGs:

- Provides easy, online method for members to join your Geo/SIG
- No cost to use
- Fast set up
- No technical expertise required
- Increased membership
- Better member contact information



- Membership information accessibility

#### Features of the Application:

- Membership application can be linked from current Geo/SIG Web site, as well as from a user's OAUG profile, and will be accessible to both OAUG members and non-members - provides multiple user entry points
- Collect user demographic information – learn more about your members
- Customized membership confirmations – send a welcome message to new members
- Ability to send information e-mail to designated e-mail address when someone joins – receive immediate notification of new members
- Ability for Geo/SIG coordinator to access and download member lists – on demand and the most current information
- Security so you only see membership information for your group
- OAUG will attempt to upload current member lists, if possible – save time manually entering your member data into the new system

#### *Online Registration Application*

This no-cost registration application allows you to post online registration applications for all of your events. Geo/SIG coordinators need to merely log into the system and provide the details for your event, including group-specific confirmation e-mails. You will be provided with a registration link that you can post on your Web site. Coordinators will also be able to track attendance and download attendee lists. This online registration application does not allow for the processing or collection of registration fees. However, full-service registration functionality is currently available through the OAUG for a discounted cost. Please contact [geo-sig@oaug.com](mailto:geo-sig@oaug.com) for information and a quote for full-service registration services.

#### *Online Geo/SIG Calendar*

Advertise your meeting to potential participants. Include your event on a master event calendar on the OAUG Web site via our no-cost event calendar application. If you use the OAUG-provided registration form, your event will automatically be included in a master Geo/SIG event calendar. Or, if you have your own registration application you wish to use, you may simply input your event information through the application to notify the OAUG of your event dates for inclusion on the master event calendar. Some benefits of the online calendar:

- Calendar will be publicly accessible from the OAUG Web site to all visitors
- Can add a link to your Geo or SIG's web site to show the events only for your group
- Should help increase registration by linking the calendar to details about your event as well as direct links to the registration form.
- Adding your event to the calendar will ensure that your event gets sent to Oracle for posting on the Oracle Global User Group calendar.

Detailed information regarding the functionality of the Geo/SIG Membership Application, Registration Application and Calendar are included in the Coordinator Resources section of the OAUG Web site, or contact [geo-sig@oaug.com](mailto:geo-sig@oaug.com).

#### *Web Advertisement Revenue Sharing*

GEOs and SIGs can generate additional revenue through referrals or the direct sale of Web banner advertisements. The OAUG will rebate to the groups' funding balance 50%



of Web banner advertising revenue generated by the affiliated group. The Web site banner advertisements can be either on the OAUG Web site or on Geo/SIG hosted Web pages. Please contact [geo-sig@oaug.com](mailto:geo-sig@oaug.com) for additional information.

## TIPS FOR A SUCCESSFUL FIRST MEETING OR EVENT

OAUG is eager to support its affiliated groups in conducting meetings throughout the year. Please feel free to contact OAUG for assistance in meeting planning and preparation at any time. Below are some suggestions for planning your group meetings.

**Step 1:** GEO - Determine a meeting location. Many groups identify a member company willing to host the meeting. Other options include public buildings (such as libraries, courthouses, or universities) a local Oracle office, or at an OAUG conference. The OAUG provides meeting space for affiliated Geo/SIGs during its conferences. All OAUG Geos are encouraged to meet at an OAUG conference and take advantage of the large user audience. All SIGs are required to meet at an OAUG conference to maintain affiliated status. Affiliated group coordinators are notified well in advance of the conference for group meeting space reservations and requirements.

**Step 2:** Determine the agenda for the meeting. When constructing your meeting agenda, try to offer your attendees presentations that address member education, allow time for member networking, and any group administrative duties.

*Member Education* - Education should be the primary objective of all groups, so it is important to incorporate informative presentations into your meetings. The OAUG, Oracle Corporation, OAUG member companies, are all good resources for finding speakers and presenters for your group whether it's a webcast for SIG or a GEO meeting. Affiliated Geo/SIG Coordinators have access to the OAUG Conference Speaker and Paper Presentation database. For more information regarding OAUG conference and speaker information, please send an email to [geo-sig@oaug.com](mailto:geo-sig@oaug.com).

*Member Networking* – For SIGs & GEOs: Take time during your meetings to have attendees introduce themselves and describe their Oracle Applications environment and specific interests or concerns. A primary objective of the OAUG community, as a whole, is to promote the networking of Oracle Applications users worldwide. Providing time before, during, or after your meetings for members to conduct informal discussions is greatly encouraged.

*Group Administration* – The OAUG requires each affiliated group to conduct an election of leadership (i.e., coordinator, officers, etc.) at least once every two years. The OAUG can provide your group with election guidelines and information. For more information on election procedures, guidelines, ballots, etc., please send an email request to [geo-sig@oaug.com](mailto:geo-sig@oaug.com).

- **Step 3:** Advertise your meeting to potential participants by adding your event to the OAUG Online Calendar. Your event will be visible to all visitors on the OAUG website and OAUG will announce your meeting information through OAUG E-news, (our bi-monthly electronic



newsletter) and provide e-mail blast services to OAUG members within the individual group. Adding your event to the calendar will also ensure that your event gets sent to Oracle for posting on the Oracle Global User Group calendar.

## OAUG GEO/SIG FORMS

All forms are available in the Geo/SIG Coordinator Resources section of the OAUG web site, or you may request forms by emailing [geo-sig@oaug.com](mailto:geo-sig@oaug.com). Following is a listing of the most common forms:

- User Community Web Site Manager Form
- Online Membership Application Registration Form
- Annual OAUG Funding Request Form
- Funding Reimbursement Request Form
- Web Site Hosting Agreement Form
- Meeting Planning Services/Pricing Information
- New Geo Affiliation Request Form
- New SIG Affiliation Request Form
- Re-Affiliation Form
- Contact Update Form
- Group Name Change
- Certificate of Distinction Award Program Application



## ADDENDUM 1

### OAUG Public Relations Policy: Authorized Spokespeople

The official spokespeople for the OAUG are the current OAUG president and the OAUG executive director. However, from time to time, the OAUG will utilize content experts outside of the OAUG president and the OAUG executive director. These content experts have knowledge and expertise in specific areas of the family of Oracle Applications.

All OAUG interviews must meet the following criteria:

- Interviews must be arranged and facilitated through the William Mills Agency.
- Spokespeople must be authorized to speak on behalf of the OAUG for each interview by the OAUG's communications team.
- A preparatory session must be held with the William Mills Agency before the interview takes place to review key messages and review details about the types of questions that may be asked.

If an OAUG leader/member is *contacted directly by the media*, the following procedures should be followed:

- Obtain the reporter's contact information and promise to get back in touch.
- Contact the William Mills Agency immediately.

If an OAUG leader/member *does have unauthorized contact* with the media, the person speaks for him/her and does not in any way represent the OAUG. This contact should still be reported to the William Mills Agency immediately. If the reporter is unclear about who the person represented during the interview, the person may be required to contact the reporter to clarify these points.

If an OAUG leader/member has *unauthorized contact with the media and misrepresents him/her* as an "official" spokesperson, the following procedures should be followed:

- The William Mills Agency is contacted immediately to determine possible damage to the OAUG's reputation and develop and implement solutions.
- A consultation is set up between the OAUG, William Mills and the person to determine what was said.
- The OAUG's current president or executive director contacts Oracle to explain the misrepresentation.
- The OAUG's executive director decides what action needs to be taken regarding the status of the unauthorized spokesperson. These actions may include:
  - Being required working with the OAUG to clarify the fact that the unauthorized spokesperson did not represent the OAUG.
  - Contacting Oracle by phone, in person or by a letter to make clear that they only spoke for themselves.