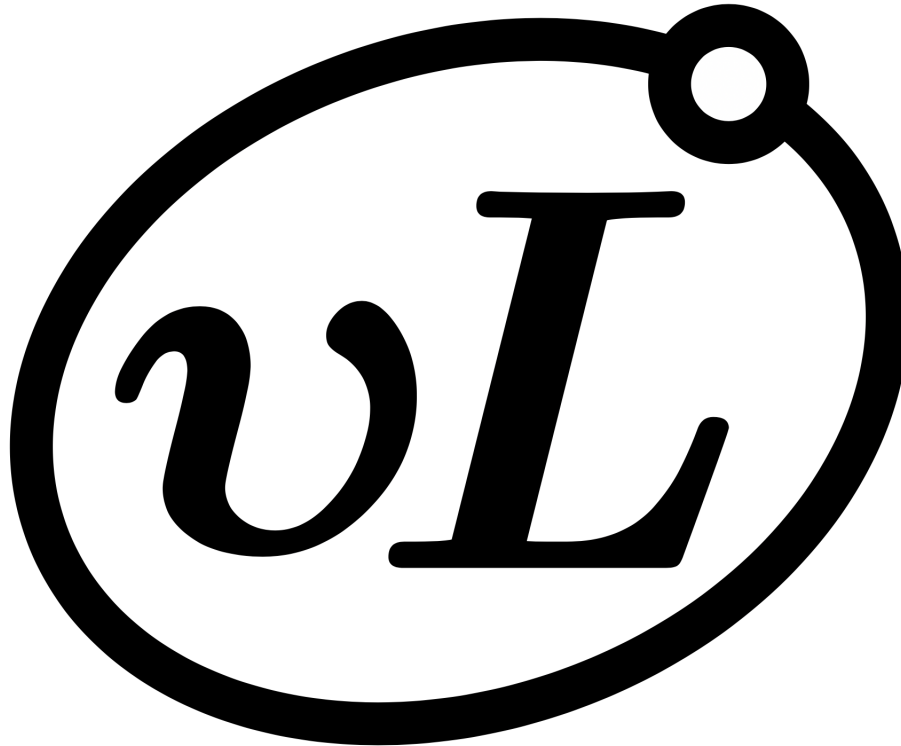# Upsilon Lab *on Founding an Academic Organization*
an Official UCLA Physics & Astronomy Department Sponsored Organization

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"A lab for undergraduates, by undergraduates."

1   Summary

We have been contacted by several undergraduates from different departments at UCLA requesting advice about founding an organization of the same type as Upsilon Lab, to fill our niche in other departments. This guide details most of the obstacles we faced during the founding year, and how we overcame them, with varying degrees of success. In short, with a vast quantity of blood, sweat, and tears, a dedicated pair of experienced undergraduates can bring research to many of their lowerclassmen peers in the space of a few months.

Contents

2 Before You Start

2.1 A Word of Warning

Successfully founding an academic organization of this format requires extreme dedication, solid connections to the faculty and staff in the department, a little notoriety amongst the undergraduates you're trying to serve, about twenty hours per week- sometimes more- and a friend in the department who is just as ambitious as you.

Taking more than 12-14 units and/or applying for graduate school, jobs, etc. in parallel is **not recommended**.

2.2 Creating Value: Something to Remember Throughout

Your organization will not be sustainable if you are not **creating value**. We can connect research teams to professors, but there is no guarantee they will be productive, nor is there any promise of commitment from the undergraduates who are volunteering. This is why we have our workshop and skill-guides program- to create some information permanence, supplement teaching for the department at all levels, and spread the word about Upsilon Lab. In other departments, this may need to take a different form, but **creating value** is key.

2.3 Being Well-Connected to the Other Department Bigshots

Having friends in high places is **absolutely essential** to success in founding a organization like Upsilon Lab. If you know the presidents of the other clubs in your department, you can leverage their networks and membership base for your advantage, and usually there will be a large crossover in the interest, as most people who will join an academic organization and thrive in it are the same who will attend social activities in the department, and otherwise partake in the existing extracurriculars.

3   Getting Started

So you've got your friend here with you and you're ready to get started.

3.1   Establishing the First Project

The first project is the most difficult, and usually the most important. For this, you will want to handpick a rockstar manager with great research experience who is willing to commit a substantial amount of their time to getting this project started. Then, you will leverage one of your connections to a professor to find a research project which is interesting to both the professor and the manager, but not time-sensitive. Now, the manager will learn about this project, while you and your co-Founder-President will continue as detailed in the next section.

3.2   Building a Project Base

While your first manager is learning about their project, write 6-10 other project descriptions as In-House, with the idea of making them interesting, and allowing for a potential switch-over to a professor-sponsored project. The details are less important for these projects, as your future managers will be able to nail down the details themselves as they go.

3.3   Building a Member Base

Once you establish these projects, we recommend creating a simple website where you can host these project descriptions and an application form, with the intention of sending prospective members and managers here, and convincing them to apply. The short-term goal here is to find 5-7 members who can contribute substantially to the first project, and sending them off; while filling a few manager positions and about 20 member positions with the remainder of the applicants. An undergraduate social club within the department is a perfect resource for the initial foray into advertising.

4 Getting Formally Established within the Department

Once you've got your project off to a solid start, hopefully with a happy professor, you can talk to your undergraduate advisor to request a meeting with the department chair to discuss your new organization. When you write the email to the chair, include a link to your website, and explain a bit about your mission.

4.1 Meeting with the Chair

Coming into the meeting with the chair, keep in mind that the chair of the department is usually friendly and eager to hear about what the undergraduates in the department are doing. Come in dressed professionally (but don't overdress) along with your co-founder and that rockstar manager. Have a professionally written and nicely typeset document to show them, with the objectives of your organization, what you have done so far, what you have planned, and what your requests are.

We suggest asking for:

- Minimal funds to help get some in-house projects rolling

- An email to the department faculty on your behalf to inform them about your organization.

At this stage, it helps your credibility if you have some professors already on board that you can talk about, and if your first manager can talk about his project in some detail.

It is very likely that the chair will give your organization nominal funding as long as you're showing that you're trying to improve the department with your organization- specifically, to help the undergraduates gain key skills. They may even talk with donors to help give even more funding to the organization, though this will likely be later- probably during your organization's second year. You'll also want to ask about presenting to the faculty about your organization at a faculty meeting to inform them and see your enthusiasm.

4.2 Presenting to the Faculty

A few weeks after you've started, prepare a presentation with some basic descriptions about your organization and goals as an organization to present to the faculty. You will want to know all the ins and outs of your organization, and will want to dress very nicely- perhaps a suit! Practice a few times, and remember that the professors are people too, and are eager to learn what you're up to in the department. Remember your mission- help undergrads gain key skills- and you'll do great!

4.3 Continued Advertising

You'll want to talk with the department counselor to figure out who is in charge of putting up posters in the department so that you can get permission to put up posters of your own. At any point, if you have a low number of members, you will want to put up posters, or send out an email to the department. To send out an email to the department, specifically to the undergraduates, just talk with the counselor about setting up a system where you can email them the email you want to send out and have it sent.

You can also go to classes in the department to advertise the organization, emailing the professor asking for permission to present for a few minutes in the beginning. You'll want to do this alongside a star project you are about to begin that will need some more members so that students will try to join that group.

Social media teasers and images are very good for advertising, especially if you are doing so through another department-affiliated club. Going to other department-affiliated clubs and advertising this one is smart for capturing your preferred audience. It helps immensely if you are already friends with the leaders of these clubs. Building rapport with students and faculty throughout the department can make the entire process of advertising significantly easier, so build those connections!

4.4 Progress Check-Ins with the Department

Every few weeks, after you've made sufficient progress in your projects, you'll want to set up a meeting with the chair to update her on your progress, perhaps get more funds for an event, etc. You can set up a system of quarterly reports just like we have, where at the end of each quarter you type up your organization's progress that entire quarter and show it to the chair, put it up around the department, and publish on the website. Remember: communication is critical! Many problems occur when one side or another is unaware of what is going on at the other end, so you'll want to make sure to get in a good habit of meeting with the chair at least once or twice a quarter to remind them that you not only exist but are also doing fantastic work!

Don't worry if you have not achieved some of your goals yet- the fact that you've achieved anything at all is impressive to the department.

5 Continued Operation & Expansion

Once you're all established in the department, you're not quite out of the woods. As a matter of fact, you're never really out of the woods, but you knew that going into it.

5.1 Maintaining a Balance of Professors, Managers and Members

One of the biggest hurdles we continue to face is maintaining the balance between the number of professors, managers and members. If you have too many professor projects without teams, it reflects poorly on you and your organization, as you're behind schedule before you even start! If you have too many managers, they don't have any teams and you're wasting their time. If members apply and don't receive an offer within a week or two, many of them will never respond to that offer! As such, it's a constant balancing game. The strategy that we find to work well is to find a manager first, and direct them to find a faculty they'd like to work on a project with; then have them coordinate and establish that project including the description and some presentation material. Once that's done, they can go visit some classes in the department or other clubs and solicit applications to their specific project.

5.2 Keeping Tabs on the Managers and Members

This is another large hurdle- since you won't be interacting directly with your members, it can be difficult to keep tabs on them and ensure they're making satisfactory progress. This is why it is essential to keep close tabs on the managers, and have regular meetings with them.

5.3 Setting Guidelines

We have been very fortunate that we have almost completely opposite viewpoints and styles when it comes to being enforcers of policies and making sure everything's working at speed. Raj has a tendency to be fast and loose about rules, creating exceptions and falling into his own loopholes at every turn. Jacob, on the other hand, believes that strict adherence to established rules are very important for success with an organization of this nature. We both acknowledge that our viewpoints are equally awful and the organization would have failed horribly without this yin-yang. Without the flexibility from Raj, progress would be incredibly slow and our member base would probably be around a quarter of what it is at the time of writing. Without Jacob's rigidity, the organization would have potentially collapsed in on itself last quarter.

5.4 Budget Allocation

Get money, don't spend it. When you do spend it, leave a huge paper trail and go through the department whenever possible.

6 Setting up for the Future

6.1 Selecting new Presidents

Presidents for a organization of this nature should be hand-picked- elections turn into a popularity contest which will never end how you wish it will. Fortunately, you will have spent nearly an entire year directly supervising these students, and you should be able to pick a pair of them with some great interpersonal dynamics, some popularity amongst the next year of other club leaders, and so on. Don't forget to keep an eye on what we discussed in Section **5.3**.

6.2 Carryover of Membership

One other thing to consider is how to ensure membership carryover between academic years. We have not yet had a chance to experience this, but we plan for all members to return, as none of them are seniors, and the new Presidents will run a membership drive as necessary.

7 In Conclusion

Founding an academic organization of this nature is a very rewarding experience in the end. At every turn, our peers who have graduated and are still around, or have otherwise outgrown the services we offer have always said "man, if a organization like Upsilon Lab was around when I started at UCLA, who knows what other great things would have happened in my life. It'd be like living in 2028." Everyone is very supportive, and the department is usually happy to help you in your endeavor, but learning the ropes is still no easy task. You're effectively taking on the role of someone far beyond your years.

So, go forth, found that organization, and don't hesitate to contact us if you have any questions, or are just looking for some advice!

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