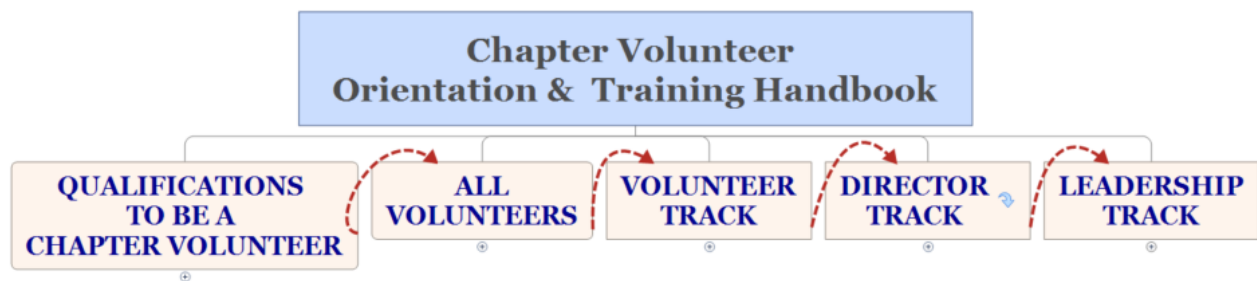


## Chapter Volunteer Orientation & Training Handbook

### OBJECTIVE:

The purpose of this handbook is to provide a structured orientation and training program for all new BetterInvesting (BI) chapter volunteers to help them expeditiously become proficient, productive and motivated members of the chapter volunteer team. Part of the benefits of this program, in addition to providing orientation and training, is in the form of "career counselling" to let the volunteers know what opportunities for higher service within the organization exist and how to get on that path.

### PROGRAM STRUCTURE:



The volunteer training program is based on several structural principles:

1. Core requirements are defined for all volunteers;
2. Defined volunteer tracks are explained;
3. Core skills within each track are identified to demonstrate knowledge of and some level of proficiency in the skills highlighted ; and
4. Identification/links to training resources that are available to support each core skill within the track are provided.

## **HOW TO USE THIS TRAINING MANUAL**

The initial driver for this manual was to efficiently train our new volunteers so that they could become proficient, productive and motivated members of the chapter volunteer team expeditiously. During the development of this manual we found that it could be used by our current, seasoned volunteers to sharpen their skills in the areas they currently were participating in, and provide them an idea of what skills would be needed as they expanded their areas of contribution within the volunteer community. It also serves as a guide to chapter mentors in coaching the new volunteers as they become assimilated in the chapter. We suspect that many other uses will be discovered as this manual is adopted throughout the BetterInvesting (BI) world.

The new volunteer and the volunteer's mentor should review this handbook together and use it as a guide for establishing training priorities. As different training objectives are achieved, they can be checked off in this handbook. In the tables with the learning objectives and hyperlinks the chapter can add additional sections of Volunteer Resources to be focused on in the volunteer's training program. Not all sections need to be completed as part of the orientation phase ... volunteer training is a journey where the reward is the learning experience, not a destination.

## **KEEPING THIS MANUAL CURRENT**

We expect that improvements will be continuously made to this manual. It was developed by a team of Chapter presidents and new volunteers; it will be improved by its users through daily use. There will be no attempt to have a "one size fits all" manual; each Chapter is free and encouraged to make it their own and structure it to fit their needs.

During the course of your use if you discover any hyperlinks that are found to be wrong, don't work, or not the best reference in a particular category, please let us know at [ChapterSupportChair@bivab.betterinvesting.net](mailto:ChapterSupportChair@bivab.betterinvesting.net).

## **A WORD ON HYPERLINKS**

We found that it was an exasperating exercise to go from a topic area in this manual to Volunteer Resources to search out an appropriate reference for the topic. It is not the intent to post reference hyperlinks for every aspect of a particular topic, just what we considered to be a good place for the new volunteer to start their exploration. We expect our new volunteer users will be the prime source of improvements, link auditing and general critiques.

# VOLUNTEER TRAINING

## OVERVIEW:

Our BetterInvesting "Volunteer Orientation & Training Program" is based on sequential developmental tracks. All volunteers passing the initial screening process and accepted to join the ranks of the volunteer corps start with "General Orientation" and then progress to the "Volunteer Track." Some volunteers never progress beyond this track, satisfied to contribute to the BetterInvesting mission through performance of various tasks, skills, projects, etcetera, in support of their chapter's education and training programs.

For those that would like to be part of the leadership/decision-making process, they progress next into the Director Track where they are further schooled in the business of running a chapter and assume responsibility for managing projects.

Chapter officers are normally drawn from the director cadre, though exceptions can be made based on individual circumstances.

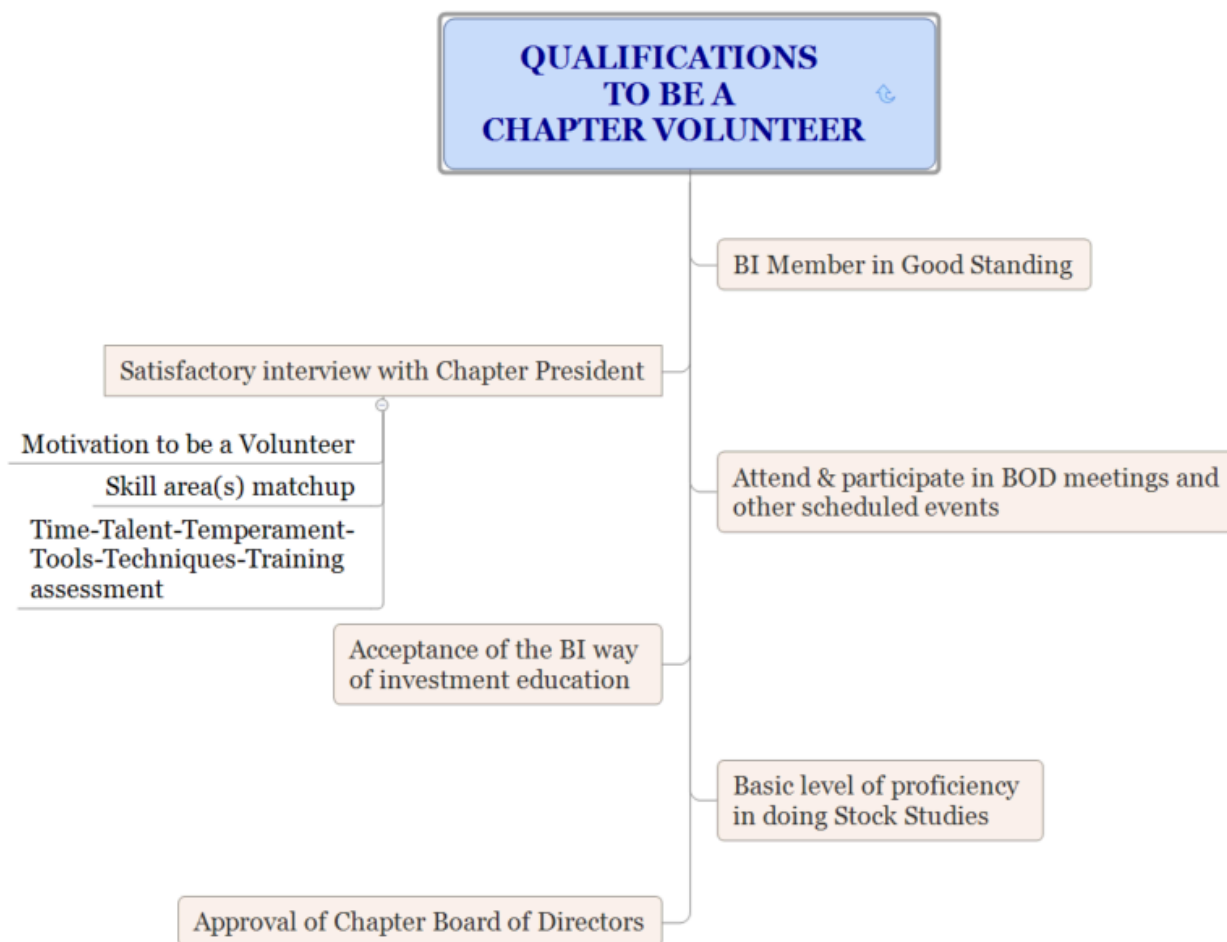
This handbook is available to download (MS Word version) in Volunteer Resources. Chapters are encouraged to adapt their handbook to their unique needs to guide their new volunteers on the chapter's overall training and development program. The details on the program are in this manual. This section provides you with a high-level view of the overall volunteer orientation and training experience.

## QUALIFICATIONS TO BE A VOLUNTEER

Your Chapter grows through the efforts of a core group of dedicated, active volunteers drawn from the Chapter's BI membership. The primary criteria for acceptance as a Chapter Volunteer is a willingness and desire to help other BI members, and future members, be successful on their journey to financial independence through investing in the BI way.

Volunteers should be motivated by a strong desire to help others. The *ideal volunteer* would be a BetterInvesting member of long standing, well versed in BI's methodology and experienced with all the BI (and ICLUB) stock study tools and research resources and intimately familiar with BI and BIVAB policies and administrative procedures. Ideal volunteers do not exist; they must be trained and developed. In the interview process we are looking for members who show interest and potential and willingness to strive to

achieve this ideal.



Hyperlinks associated with this section:

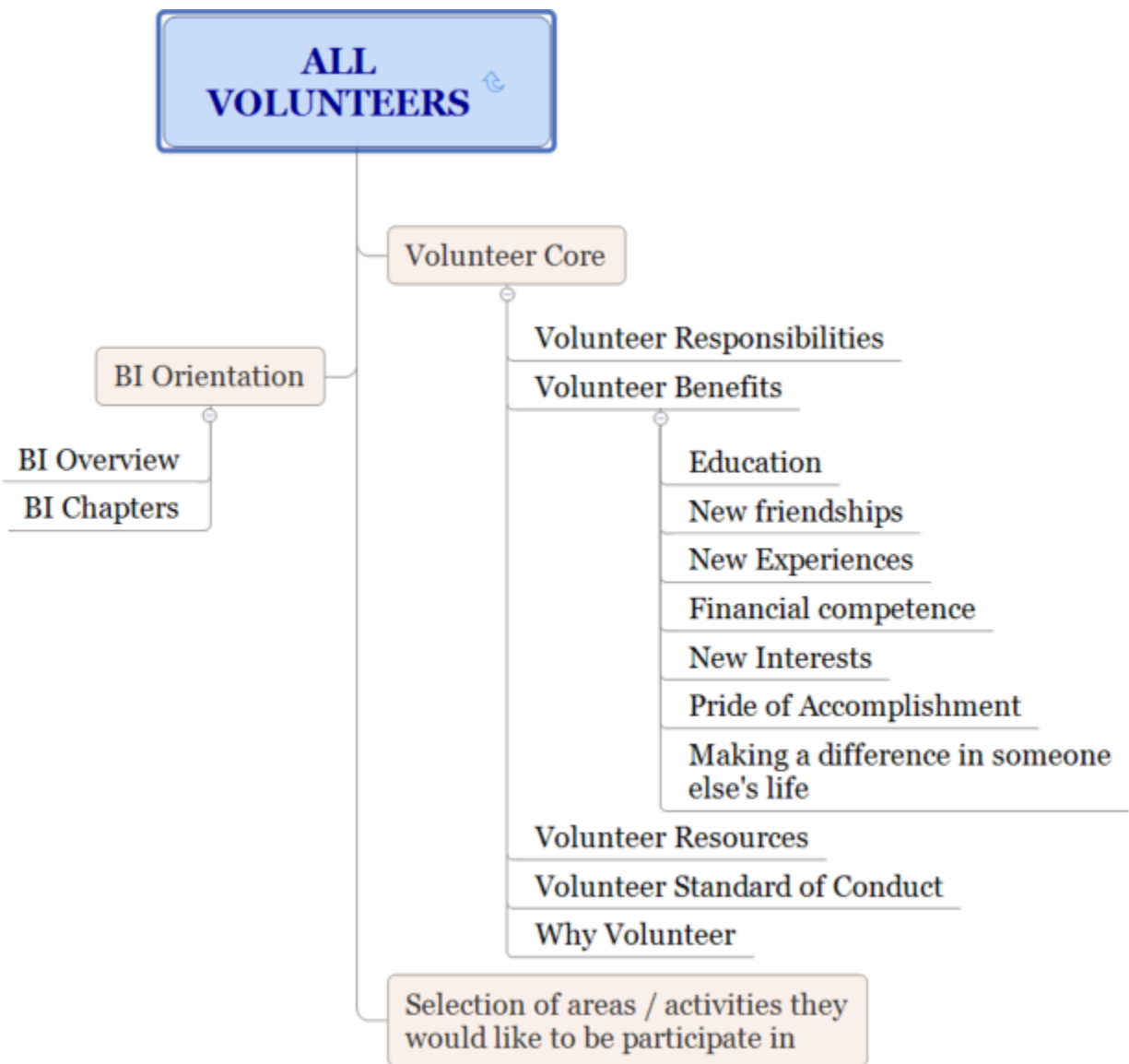
Click to open the [volunteer application form](#)

## CORE REQUIREMENTS OF ALL VOLUNTEERS

This is the initial orientation stage that ALL volunteers go through upon being accepted for service as a Chapter volunteer. It is in this stage, if not before, that a chapter mentor will be assigned to the new volunteer to help guide her on her roles as a volunteer and to reinforce her motivation to serve and become part of the chapter's winning team.

The graphics below display some of the major topic areas covered in this initial

orientation.



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |  |                          |   |
|--------------------------|--|--------------------------|---|
| <input type="checkbox"/> | <a href="#">Volunteer Responsibilities</a> | <input type="checkbox"/> | <a href="#">Volunteer Standard of Conduct</a> |
| <input type="checkbox"/> | <a href="#">Volunteer Benefits</a>         | <input type="checkbox"/> | <a href="#">Why Volunteer</a>                 |
| <input type="checkbox"/> | <a href="#">Volunteer Resources</a>        | <input type="checkbox"/> |   |
| <input type="checkbox"/> |  | <input type="checkbox"/> |   |

## VOLUNTEER TRAINING TRACKS:

There are three defined volunteer training tracks within the chapter - volunteer track, director track and officer track:



## VOLUNTEER TRACK

In these three tracks we list a variety of initiatives, projects and specialty skills from which the new volunteer and the volunteer's chapter mentor can choose to get the volunteer started and involved in chapter activities. It is imperative that new volunteers be given meaningful responsibilities to capture and channel their initial enthusiasm for service.

Throughout this training period sincere positive feedback and coaching for improving is critical to continue to build interest in serving as a volunteer. The various BI award levels should be used to further recognize volunteer achievements.

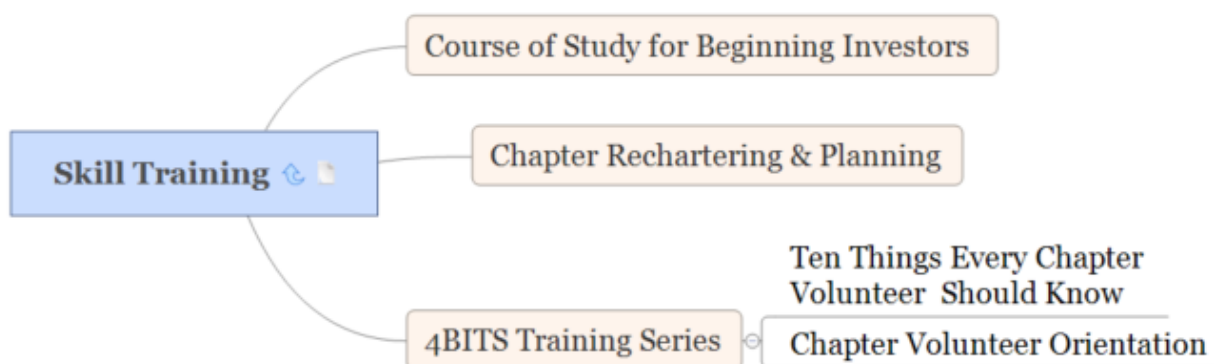
The table below lists the current positions that are tracked in volunteer roster administration. As additional positions are identified they should be reported to BIVAB (Chapter Support) for inclusion in future database updates.

| Check all positions that apply.                         |   |  |
|---|---|--|
| <input type="checkbox"/> Budget/Finance/Audit           | <input type="checkbox"/> GTM Organizer              | <input type="checkbox"/> Outreach/Money Smart Week     |
| <input type="checkbox"/> Club Support/Visit Coordinator | <input type="checkbox"/> Marketing/Publicity        | <input type="checkbox"/> President/Chairman            |
| <input type="checkbox"/> Communications/Newsletter      | <input type="checkbox"/> Materials & Equipment      | <input type="checkbox"/> Secretary/Assistant Secretary |
| <input type="checkbox"/> Data Manager                   | <input type="checkbox"/> Member Growth/Support      | <input type="checkbox"/> Special Assignment            |
| <input type="checkbox"/> Education Programs             | <input type="checkbox"/> Member Outreach            | <input type="checkbox"/> Teacher                       |
| <input type="checkbox"/> Email Communications           | <input type="checkbox"/> Mentor                     | <input type="checkbox"/> Treasurer/Assistant Treasurer |
| <input type="checkbox"/> Events Chair                   | <input type="checkbox"/> Model Club Officer/Contact | <input type="checkbox"/> Vice President                |
| <input type="checkbox"/> Events Registrar               | <input type="checkbox"/> National/BIVAB Volunteer   | <input type="checkbox"/> Visit-A-Club Contact          |
| <input type="checkbox"/> Facilities Coordinator         | <input type="checkbox"/> Nomination Committee       | <input type="checkbox"/> Web Author                    |

Volunteer activities in this first Volunteer Track fall into four areas:



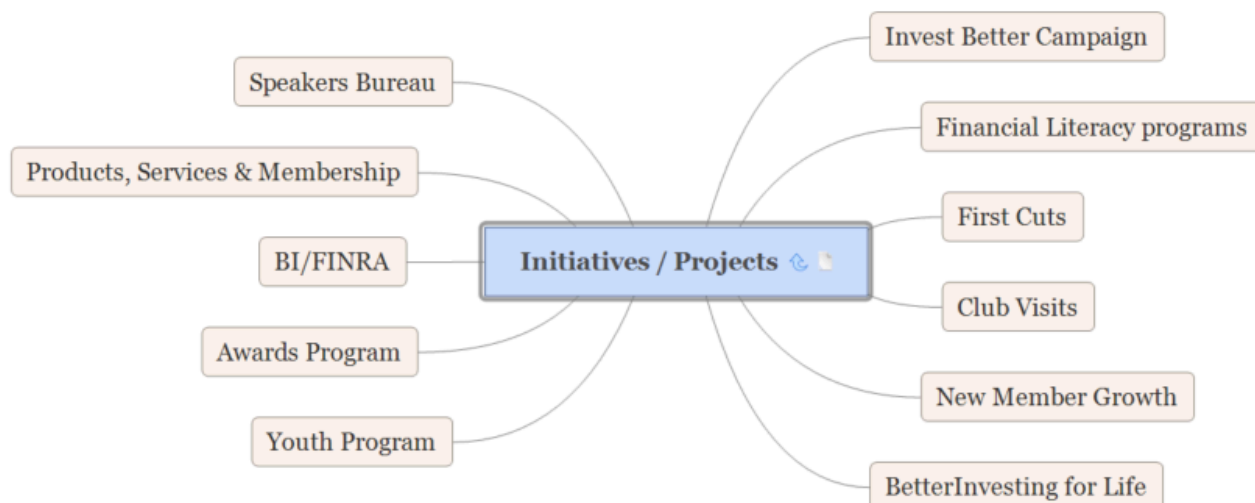
**1. Skill Training:** here you will be exposed to core competency materials and resources to help you quickly become a productive volunteer member of the chapter.



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |   |                          |   |
|--------------------------|---|--------------------------|---|
| <input type="checkbox"/> | <a href="#">Course of Study for Beginning Investors</a> | <input type="checkbox"/> | <a href="#">Chapter Rechartering &amp; Planning</a> |
| <input type="checkbox"/> | <a href="#">4BITS Training Series</a>                   | <input type="checkbox"/> |   |
| <input type="checkbox"/> |   | <input type="checkbox"/> |   |

**2. Initiatives/Projects:** this is your first quick peek at the full scope of the various programs and initiatives that are offered to our membership by BetterInvesting's home office and the BetterInvesting Volunteer Advisory Board (BIVAB). At first glance it can be intimidating. Don't let it throw you off ... you're now part of a team that makes all this work out for our membership.



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |   |                          |   |
|--------------------------|---|--------------------------|---|
| <input type="checkbox"/> | <a href="#">Invest Better Campaign</a>                  | <input type="checkbox"/> | <a href="#">Money Smart Week</a>                    |
| <input type="checkbox"/> | <a href="#">First Cuts</a>                              | <input type="checkbox"/> | <a href="#">Visit-a-Club</a>                        |
| <input type="checkbox"/> | <a href="#">New Member Growth</a> small ref in Chap Ops | <input type="checkbox"/> | <a href="#">BetterInvesting for Life Handbook</a>   |
| <input type="checkbox"/> | <a href="#">Youth Program</a>                           | <input type="checkbox"/> | <a href="#">Awards Program</a>                      |
| <input type="checkbox"/> | <a href="#">BI/FINRA</a>                                | <input type="checkbox"/> | <a href="#">Products, Services &amp; Membership</a> |
| <input type="checkbox"/> | <a href="#">Speakers Bureau</a>                         | <input type="checkbox"/> | <a href="#">Club Visits</a>                         |
|                          |   |                          |   |



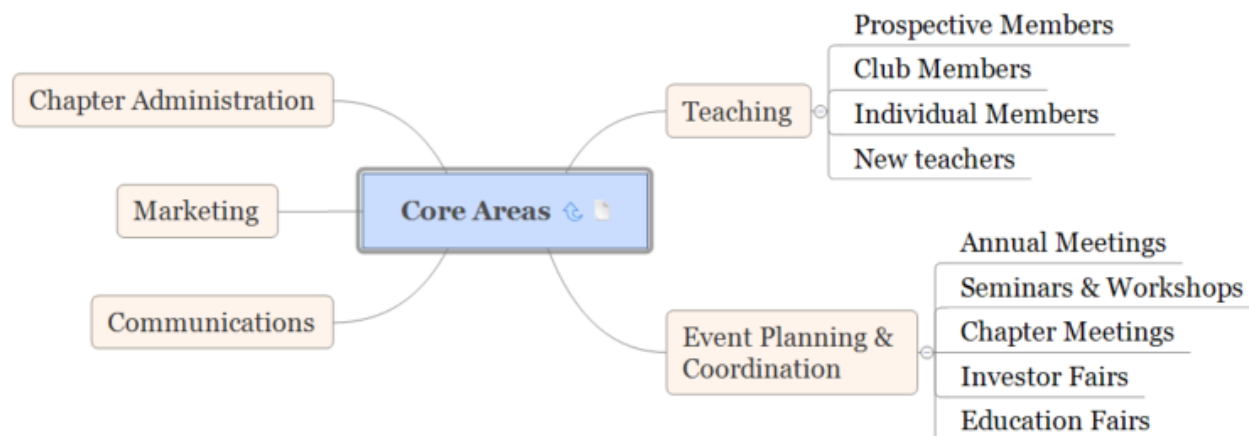
**3. Specialties Issues/Skills:** now we're looking at sharpening your competency on a variety of organizational skills, tools, programs that are essential for you to be able to contribute your part to the effective and efficient leadership, management and administration of the chapter. What you learn here will help to fill out your resume and help you become a more valued (and sought after) volunteer.



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|  |   |
|--|---|
| <input type="checkbox"/> <a href="#">Interspire</a>  | <input type="checkbox"/> <a href="#">Basics of CMS</a>  |
| <input type="checkbox"/> <a href="#">Eventbrite</a>  | <input type="checkbox"/> <a href="#">Basics of CMS</a>  |
| <input type="checkbox"/> <a href="#">Chapter Membership Files</a> - accessible by chapter's president and secretary only | <input type="checkbox"/> <a href="#">CMS Presentation</a> (in Volunteer Resources   Communications Tools   Chapter Web Authoring) |
| <input type="checkbox"/>   | <input type="checkbox"/>  |

**4. Core Areas:** here we have a variety of sub-tracks to build on your area(s) of interest in serving, such as teaching, event planning and coordination, communications, marketing and chapter administration.



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|     |   |     |   |
|-----|---|-----|---|
| [ ] | <b>Teaching</b> <ul style="list-style-type: none"> <li>• Prospective Members</li> <li>• Club Members</li> <li>• Individual Members</li> <li>• New teachers</li> </ul> | [ ] | <b>Event Planning &amp; Coordination</b><br><a href="#">Chapter IV, Chapter Operations Manual, Planning &amp; Committees</a> <ul style="list-style-type: none"> <li>• Annual Meetings</li> <li>• Seminars &amp; Workshops</li> <li>• Chapter Meetings</li> <li>• Investor Fairs</li> <li>• Education Fairs</li> </ul> |
| [ ] | <a href="#">Communications</a>  |     |   |
| [ ] | <a href="#">Chapter Administration</a>  |     |   |

All the key volunteer positions are listed below. The chapter's secretary is responsible for maintaining this list showing, for each volunteer, their current position(s).

**Check all positions that apply.**

|   |   |  |
|---|---|--|
| <input type="checkbox"/> Budget/Finance/Audit           | <input type="checkbox"/> GTM Organizer              | <input type="checkbox"/> Outreach/Money Smart Week     |
| <input type="checkbox"/> Club Support/Visit Coordinator | <input type="checkbox"/> Marketing/Publicity        | <input type="checkbox"/> President/Chairman            |
| <input type="checkbox"/> Communications/Newsletter      | <input type="checkbox"/> Materials & Equipment      | <input type="checkbox"/> Secretary/Assistant Secretary |
| <input type="checkbox"/> Data Manager                   | <input type="checkbox"/> Member Growth/Support      | <input type="checkbox"/> Special Assignment            |
| <input type="checkbox"/> Education Programs             | <input type="checkbox"/> Member Outreach            | <input type="checkbox"/> Teacher                       |
| <input type="checkbox"/> Email Communications           | <input type="checkbox"/> Mentor                     | <input type="checkbox"/> Treasurer/Assistant Treasurer |
| <input type="checkbox"/> Events Chair                   | <input type="checkbox"/> Model Club Officer/Contact | <input type="checkbox"/> Vice President                |
| <input type="checkbox"/> Events Registrar               | <input type="checkbox"/> National/BIVAB Volunteer   | <input type="checkbox"/> Visit-A-Club Contact          |
| <input type="checkbox"/> Facilities Coordinator         | <input type="checkbox"/> Nomination Committee       | <input type="checkbox"/> Web Author                    |

# DIRECTOR TRACK

The Director track starts off with the “Associate Director” period during which volunteers begins to add to their competencies about running the business of a Chapter.

The normal timeline is a one-year apprenticeship followed by a vote by the full Directors for designation as a voting Director. While the one-year apprenticeship is still a valid criterion, this program folds in the concept of demonstrated competency before being considered as voting director. Not all, or even most, of the areas below need to be mastered but some level of competence is expected in some areas and an awareness overall that there is more to be learned.

Demonstrated competency before being considered as voting director is required.

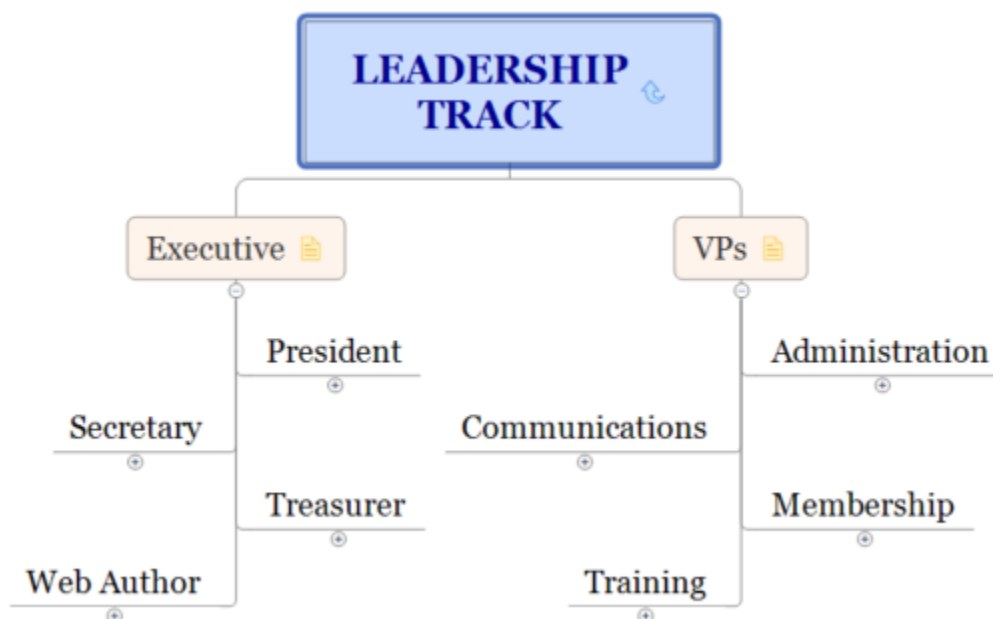


Hyperlinks associated with this section: (check off as completed; add additional as needed)

|  |   |
|--|---|
| <input type="checkbox"/> <a href="#">BI Overview</a>                             | <input type="checkbox"/> <a href="#">BI Principles</a>  |
| <input type="checkbox"/> <a href="#">Chapter Administration</a>                  | <input type="checkbox"/> <a href="#">Chapter Operations Manual</a>  |
| <input type="checkbox"/> <a href="#">Chapter Basics</a>                          | <input type="checkbox"/> <a href="#">Chapter Listings</a>   |
| <input type="checkbox"/> <a href="#">My Chapter</a>                              | <input type="checkbox"/> <a href="#">Member Stories</a>   |
| <input type="checkbox"/> <a href="#">Chapter I: Purpose &amp; Function of BI</a> | <input type="checkbox"/> <a href="#">Chapter III: Officer &amp; Directors</a>   |
| <input type="checkbox"/> <a href="#">Chapter IV: Planning &amp; Committees</a>   | <input type="checkbox"/> <a href="#">Chapter X: Model Investment Clubs</a>  |
| <input type="checkbox"/> <a href="#">Appendix B-1: Chapter Bylaws</a>            | <input type="checkbox"/> <a href="#">Bylaws</a><br>(update hyperlink to go to your chapter's Bylaws if local modifications, approved by BIVAB, exist) |
| <input type="checkbox"/> <a href="#">Chapter Goals</a>                           |   |
| <input type="checkbox"/> <a href="#">10 Things All Volunteers Should Know</a>    | <input type="checkbox"/>  |
| <input type="checkbox"/>   | <input type="checkbox"/>  |

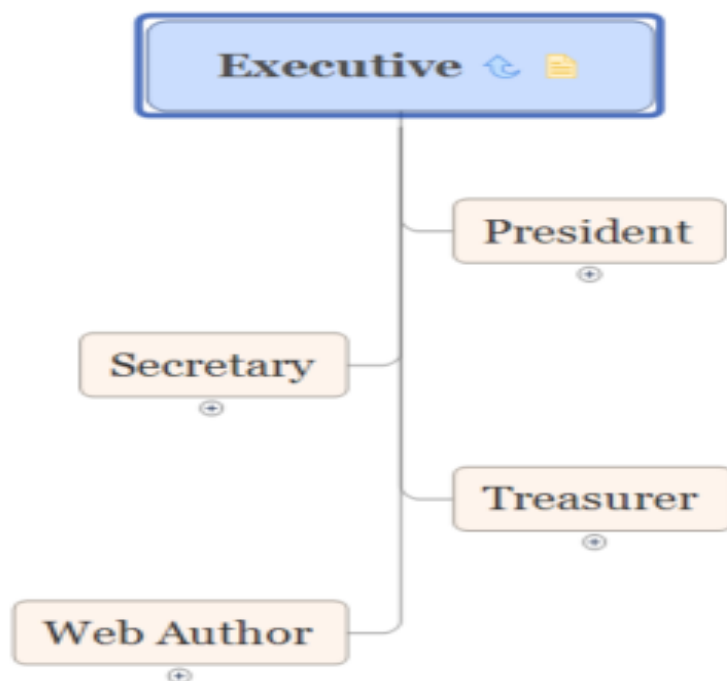
# LEADERSHIP TRACK

At this level we're dealing with a Director that has demonstrated a high level of core competency in several areas and a desire to assume even more responsibilities within the Chapter, leading whole "program areas" and taking the lead on projects and tasks. Ideally, every 2-3 years, there would be a rotation in offices held. In the most mature chapters, there may even be a sequence in offices defined, akin to a 2nd VP going to 1st VP then to President then to Immediate Past President (so a 4 year "commitment").



## Executive:

This is the group of officers whose primary duties is the efficient administration of the business of the chapter. Most chapters use the familiar president, vice-president, secretary and treasurer model with committees focusing on the chapter's key mission areas. Other chapters split the vice president's duties into four or more functional areas that align with administration, communications, membership and training. And there are a variety of other hybrid/matrix organization models that may be adapted to the chapter's unique requirements and circumstances. The web author, because of the critical position this person plays in the success of the chapter is included in the Executive branch.

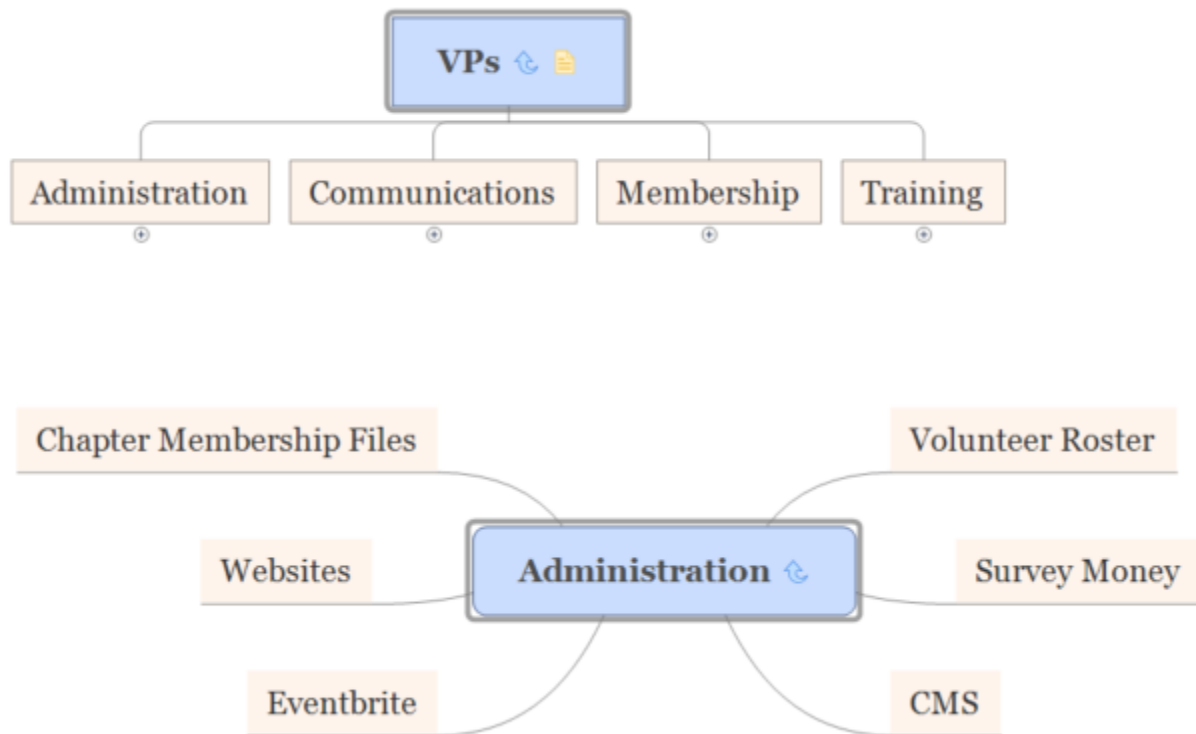


Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |  |                          |  |
|--------------------------|--|--------------------------|--|
| <b>President:</b>        |  |                          |  |
| <input type="checkbox"/> | <a href="#">BIVA Board</a>                     | <input type="checkbox"/> | <a href="#">Chapter Administration</a>           |
| <input type="checkbox"/> | <a href="#">BI Headquarters</a>                | <input type="checkbox"/> | <a href="#">Chapter Strategic Plan</a>           |
| <input type="checkbox"/> | <a href="#">Chapter Goals</a>                  | <input type="checkbox"/> | <a href="#">Chapter KRAs</a>                     |
| <input type="checkbox"/> |  | <input type="checkbox"/> |  |
| <b>Secretary:</b>        |  |                          |  |
| <input type="checkbox"/> | <a href="#">Chapter VII: Rechartering</a>      | <input type="checkbox"/> | <a href="#">Club Treasurer Workshop webinar</a>  |
| <input type="checkbox"/> |  | <input type="checkbox"/> |  |
| <b>Treasurer:</b>        |  |                          |  |
| <input type="checkbox"/> | <a href="#">Chapter VII: Finance</a>           | <input type="checkbox"/> | <a href="#">Investment Club Hub</a>              |
| <b>Web Author:</b>       |  |                          |  |
| <input type="checkbox"/> | <a href="#">Own Chapter Webpage on BI site</a> | <input type="checkbox"/> | <a href="#">ChapterWebpage QualityGuidelines</a> |
| <input type="checkbox"/> | <a href="#">Chapter Web Authoring Overview</a> | <input type="checkbox"/> | <a href="#">CMS Web Author User Guide</a>        |

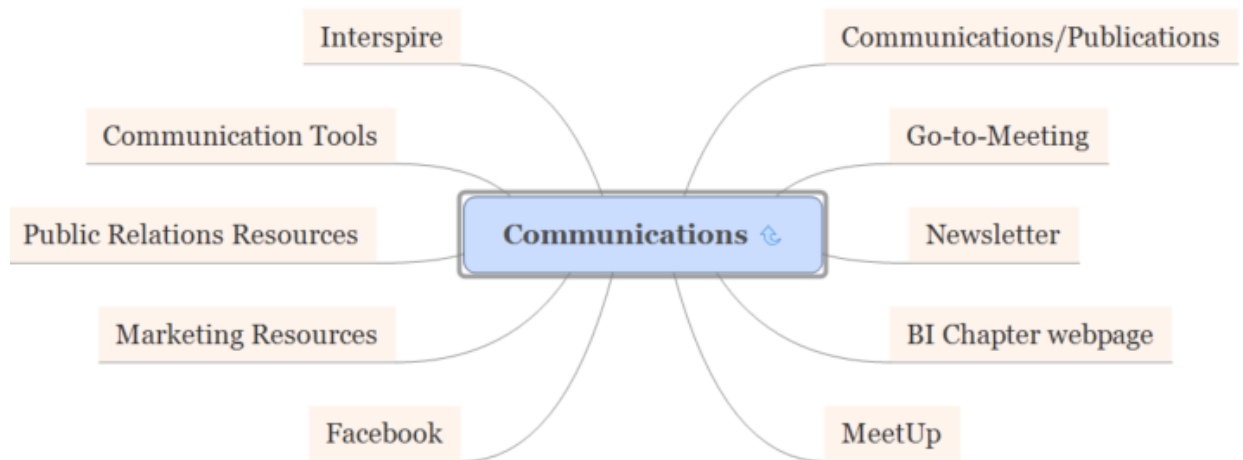
## Vice Presidents

In this organizational structure the traditional vice president's role (a just-in-case stand-in for an absent president) is repositioned to be focused on the mission of the chapter (training and education for members of BI) and the key enabling initiatives (membership, communications and administrative). In smaller chapters these functions are headed up by committee chairs. The position of vice president should include significant duties that prepare the incumbent to assume the president's duties in the course of normal rotation.



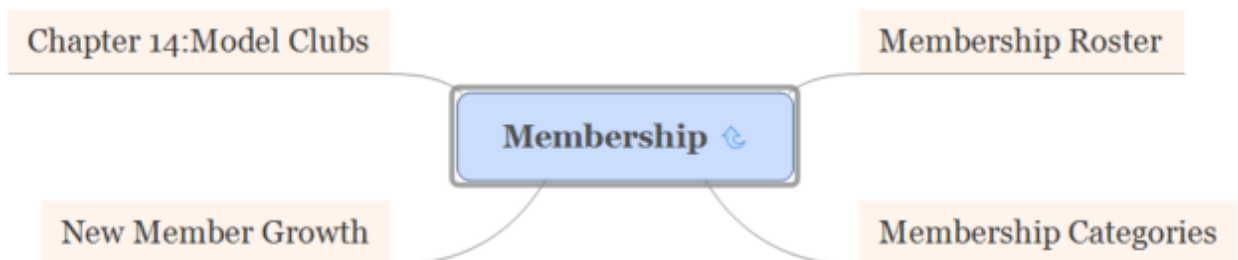
Hyperlinks associated with this section: (check off as completed; add additional as needed)

|   |   |
|---|---|
| <input type="checkbox"/> <a href="#">Volunteer Roster</a> | <input type="checkbox"/> <a href="#">CMS</a>                      |
| <input type="checkbox"/> <a href="#">Eventbrite</a>       | <input type="checkbox"/> <a href="#">Chapter Membership Files</a> |
| <input type="checkbox"/> Survey Monkey                    | <input type="checkbox"/> Website(s)                               |



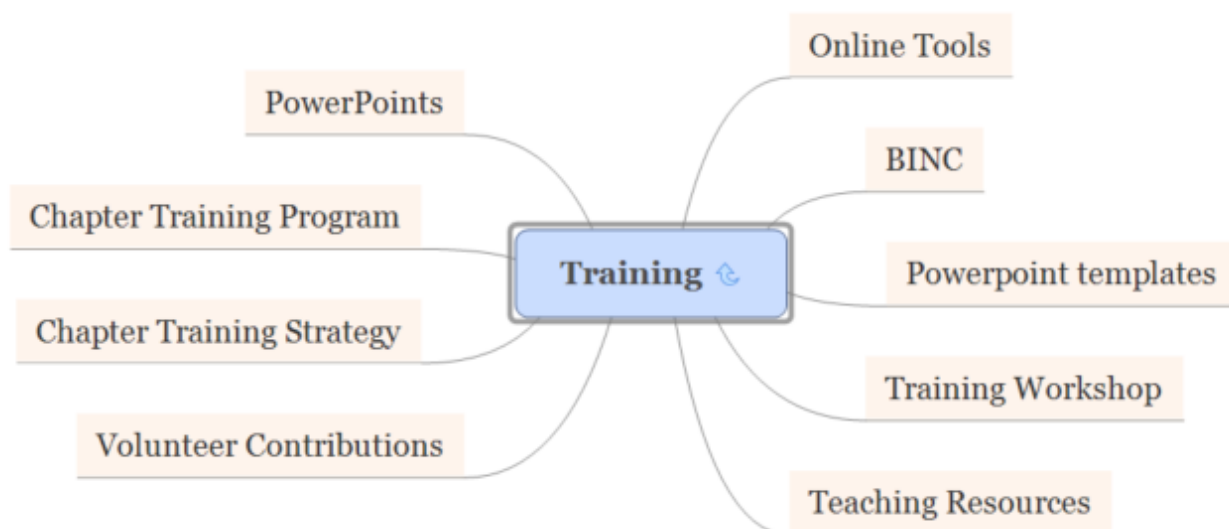
Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |   |                          |  |
|--------------------------|---|--------------------------|--|
| <input type="checkbox"/> | <a href="#">Communications/Publications</a> | <input type="checkbox"/> | <a href="#">Go-to-Meeting</a>              |
| <input type="checkbox"/> | Chapter Newsletters                         | <input type="checkbox"/> | Meetup                                     |
| <input type="checkbox"/> | <a href="#">Marketing Resources</a>         | <input type="checkbox"/> | <a href="#">Public Relations Resources</a> |
| <input type="checkbox"/> | <a href="#">Communication Tools</a>         | <input type="checkbox"/> |  |
| <input type="checkbox"/> | <a href="#">Interspire</a>                  | <input type="checkbox"/> |  |



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |   |                          |   |
|--------------------------|---|--------------------------|---|
| <input type="checkbox"/> | <b>Membership Roster</b> access by chapter president and secretary only (in Volunteer Resources Chapter Operations HO Apps) | <input type="checkbox"/> | <a href="#">New Chapter 10: Model Clubs Member Growth</a> |
| <input type="checkbox"/> | <a href="#">New Member Growth</a>   | <input type="checkbox"/> |   |
| <input type="checkbox"/> |   | <input type="checkbox"/> |   |



Hyperlinks associated with this section: (check off as completed; add additional as needed)

|                          |                                      |                          |   |
|--------------------------|--------------------------------------|--------------------------|---|
| <input type="checkbox"/> | <a href="#">Online Tools</a>         | <input type="checkbox"/> | <a href="#">BINC</a>                    |
| <input type="checkbox"/> | <a href="#">PowerPoint templates</a> | <input type="checkbox"/> | <a href="#">Training Workshop</a>       |
| <input type="checkbox"/> | <a href="#">Teaching Resources</a>   | <input type="checkbox"/> | <a href="#">Volunteer Contributions</a> |
| <input type="checkbox"/> |                                      | <input type="checkbox"/> |   |
| <input type="checkbox"/> |                                      | <input type="checkbox"/> |   |

## In Conclusion

Congratulations and thank you for volunteering to help others become successful and better investors. You are now embarking on a new and personally rewarding adventure. Up until now you have been in a “learn - do” cycle where you’ve benefited from all the training resources available to all members and applied this knowledge in your own investment program. By volunteering, you’ve added “share” to this cycle. You’re not done with learning. Being a volunteer provides you the opportunity and resources to expand your knowledge, not just about investing, but in a broader area of learning new skills that we hope will spill over to enhance your professional and personal quality of life.

Welcome aboard and thank you for joining the Volunteer Cadre that is so valued by our membership and BetterInvesting.