

Volunteer Orientation & Training Handbook

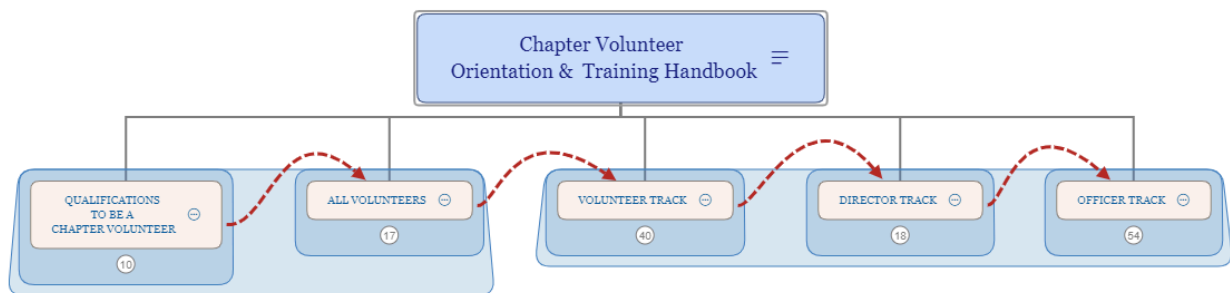
OBJECTIVE:

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 counseling" 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 to demonstrate knowledge of and some level of proficiency in the skills highlighted are identified; and
4. Identification/links to training resources 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 BI world.

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 note the best reference in a particular category please let us know at 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 her exploration. We expect our new volunteer users will be the prime source of improvements, link auditing, and general critiques.

VOLUNTEER TRAINING

OVERVIEW:

The chapter "Volunteer Orientation & Training Program" is based on sequential developmental tracks. All BI members passing the initial screening process and are accepted to join the ranks of the Chapter's volunteer corps start with a general *All Volunteers* orientation and then progress to the *Volunteer Track*. Some volunteers never progress beyond the *Volunteer Track*, satisfied to contribute to BI and Chapter missions through the performance of various tasks, skills, projects, etc.

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 are responsible for managing projects.

Volunteers who wish to enter the *Director Track* start a one-year training period as an *Associate Director*. Associate directors are designated by vote of the chapter board. During their associate training period, the volunteer will assume additional responsibilities including leading committees or managing major chapter activities. Upon successfully completing their associate training curriculum the volunteer is eligible to be voted in by the board as a *Voting Director*.

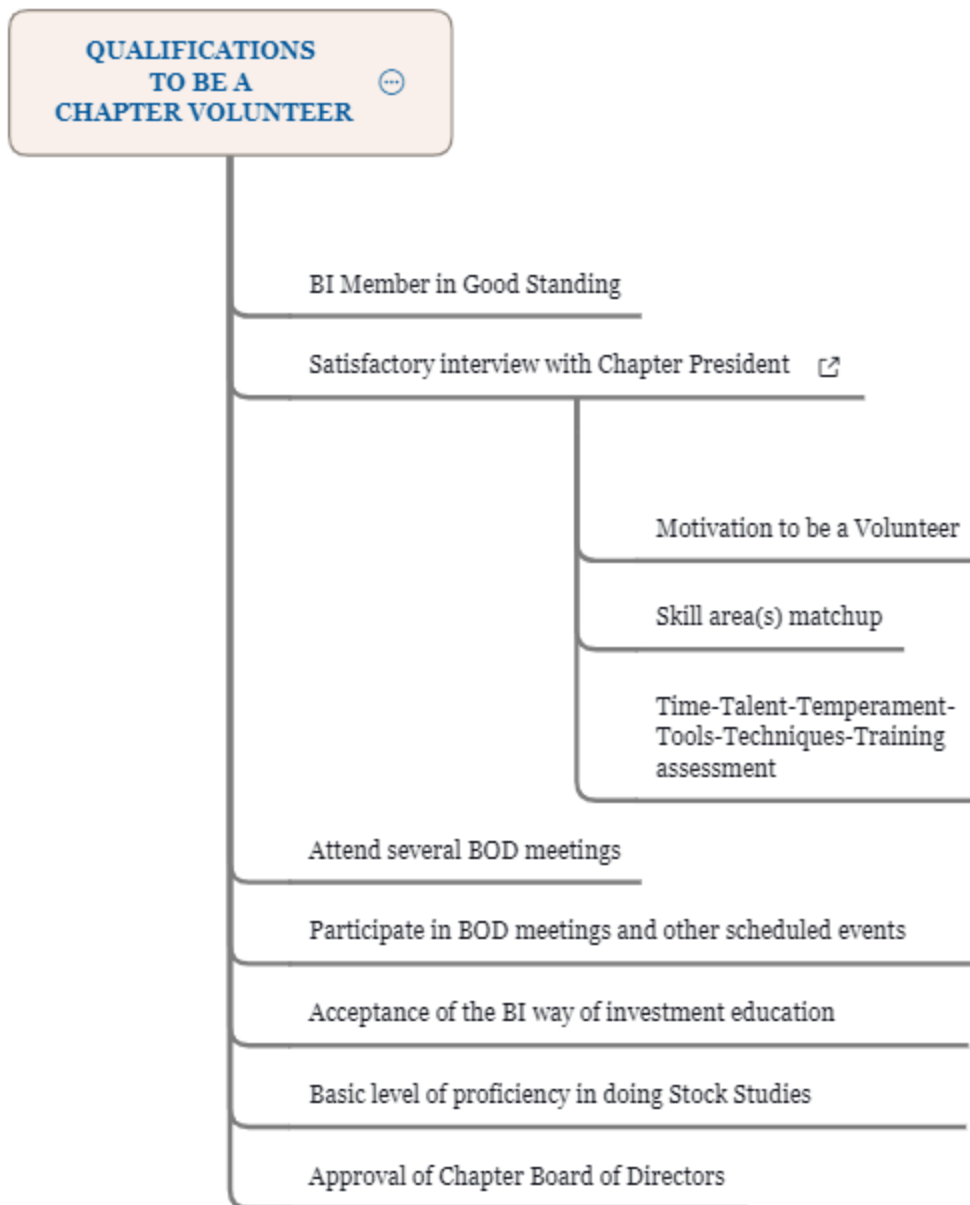
Chapter officers are elected from the voting director cadre though exceptions can be made based on individual circumstances. Elected officers are automatically voting directors by virtue of being voted in by the board to serve in the office.

This training manual is the guide for new volunteers on the Chapter's overall training and development program.

QUALIFICATIONS TO BE A VOLUNTEER:

Our Chapter grows through the efforts of a core group of dedicated, active volunteers drawn from our Chapter's BetterInvesting 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. The interview process is a two-way flow of information where the applicant learns more about BetterInvesting and the chapter and the interviewer finds out more about the future volunteer, her motivations, and what skill sets she would bring to the chapter. .



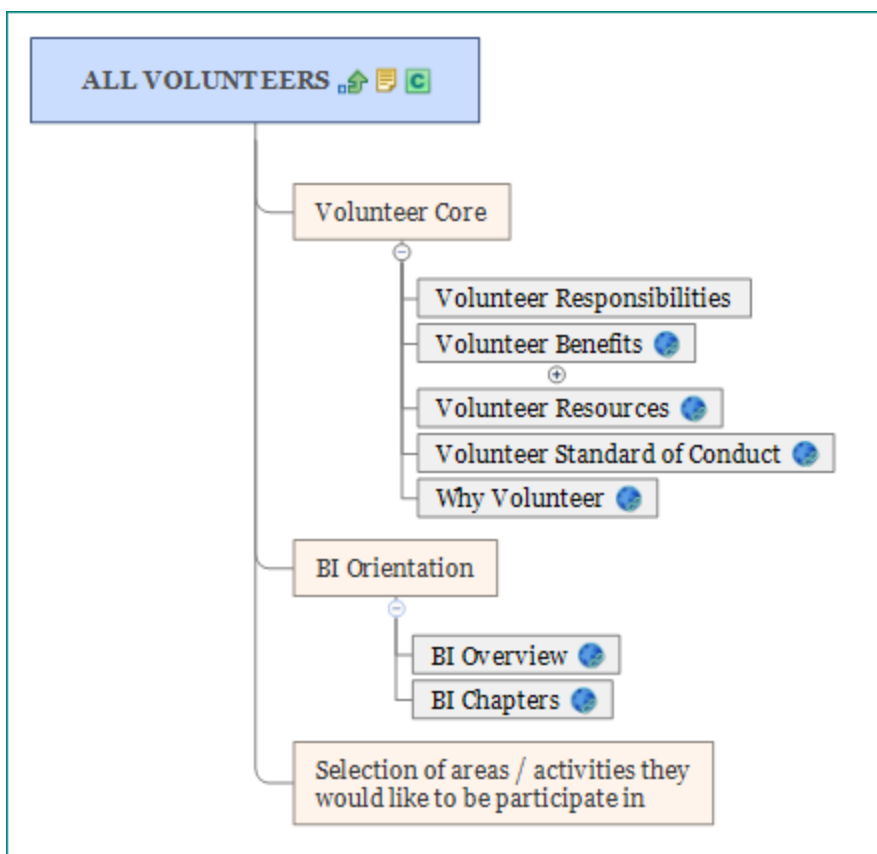
Hyperlinks associated with this section:

Satisfactory Interview with President

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 success team.



Hyperlinks associated with this section:

[Volunteer Responsibilities](#)

[Volunteer Benefits](#)

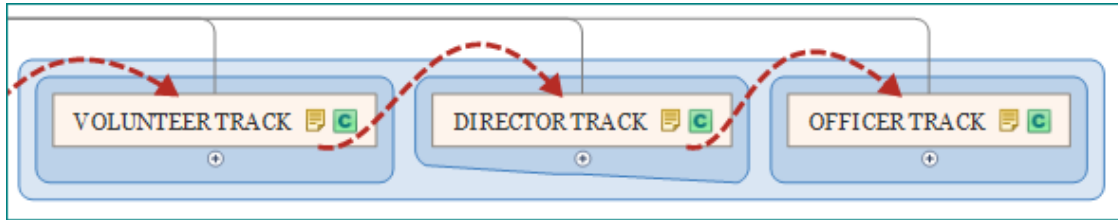
[Volunteer Resources](#)

[Volunteer Standard of Conduct](#) rev date 11/2021

[Why Volunteer](#)

VOLUNTEER TRACKS:

There are 3 defined volunteer service tracks within the chapter.



VOLUNTEER TRACK:

This area lists a variety of initiatives, projects, and special 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 improvement is critical to continuously build interest for serving as a volunteer. The various BI award levels should be used to further recognize significant 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 the 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 TRACK

- Initiatives / Projects
 - Invest Better Campaign
 - Money Smart Week
 - First Cuts
 - Club Visits
 - New Member Growth
 - BetterInvesting for Life
 - Youth Program
 - Awards Program
 - BI/FINRA
 - Products, Services & Membership
 - Speakers Bureau
- Specialty Issues / Skills
 - Interspire
 - Basics of CMS
 - Basics of CMS Presentation
 - Chapter Web Page
 - Eventbrite
 - Chapter Membership Files
- Core Areas
 - Teaching
 - Prospective Members
 - Club Members
 - Individual Members
 - New teachers
 - Event Planning & Coordination
 - Annual Meetings
 - Seminars & Workshops
 - Chapter Meetings
 - Investor Fairs
 - Education Fairs
 - Communications
 - Marketing
 - Chapter Administration

These volunteer activities fall into four areas:

Skill Training

Hyperlinks associated with this section:

Course of Study for Beginning Investors	BetterInvesting Online Volunteer Training Series	Chapter Finances and Rechartering
---	--	---

Initiatives/Projects

Hyperlinks associated with this section:

Invest Better Campaign	Public Outreach	First Cuts
Visit-a-Club	New Member Growth	Awards Program
BetterInvesting for Life Handbook	Youth Program	BI/FINRA
Products, Services & Membership	Speakers Bureau	Club Support Visits

Specialities Issues / Skills

Hyperlinks associated with this section:

Interspire	CMS Presentation	Basics of CMS
Eventbrite	Chapter Membership Files - accessible by chapter's president and secretary only	

Core Areas

Hyperlinks associated with this section: *(none identified yet)*

Teaching	<ul style="list-style-type: none"> • Prospective Members • Club Members • Individual Members • New teachers
----------	---

Event Planning & Coordination Chapter IV, Chapter Operations Manual, Planning & Committees	<ul style="list-style-type: none"> • Annual Meetings • Seminars & Workshops • Chapter Meetings • Investor Fairs • Education Fairs 	
Communications		
Chapter Administration		

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.

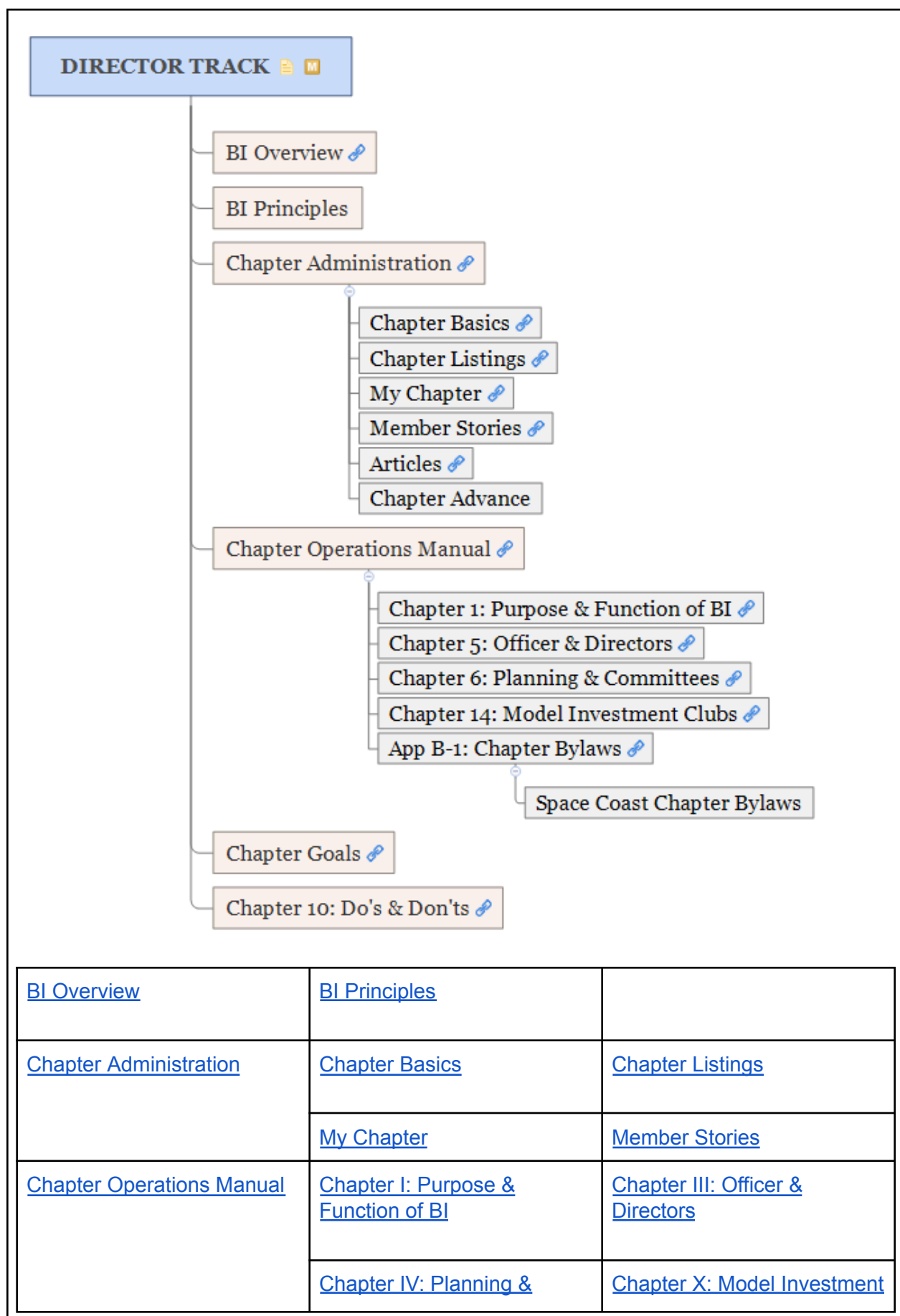
<input type="checkbox"/> Budget/Finance/Audit	<input type="checkbox"/> GTM Organizer	<input type="checkbox"/> Outreach/Money Smart Week
<input type="checkbox"/> Club Support/Visit Coordinator	<input type="checkbox"/> Marketing/Publicity	<input type="checkbox"/> President/Chairman
<input type="checkbox"/> 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 the volunteer begins to add to her competencies new knowledge about running the business of a Chapter.

The normal timeline is a one-year apprenticeship followed by a vote by the Voting 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 eligible to be a voting director. Not all, or even most, of the areas below need to be mastered. The objective is to attain some level of competency in one or more of them and an awareness that there is more to be learned.

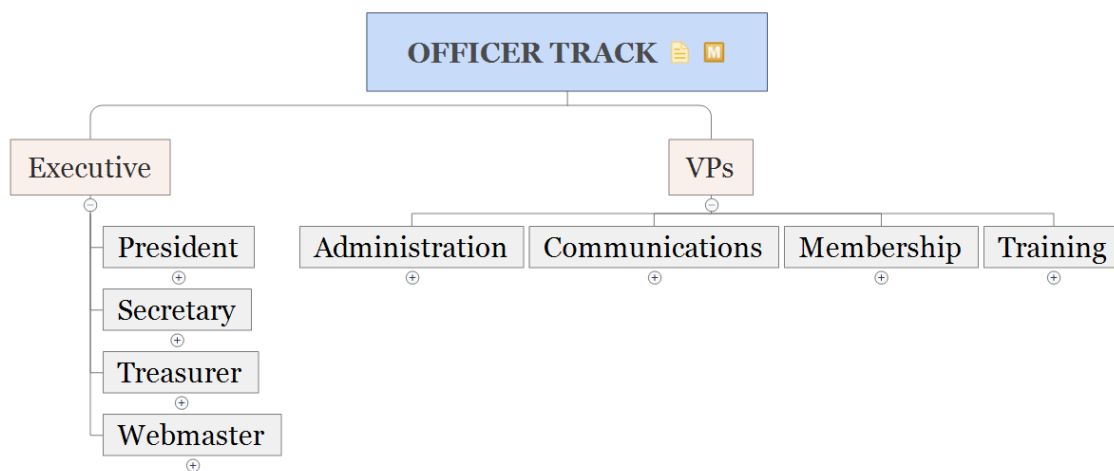
Demonstrated competency before being considered as a voting director is required.



	Committees	Clubs
	Appendix B-1: Chapter Bylaws	Bylaws (update hyperlink to go to your chapter's Bylaws if local modifications, approved by BIVAB, exist)
Chapter Goals	10 Things All Volunteers Should Know	

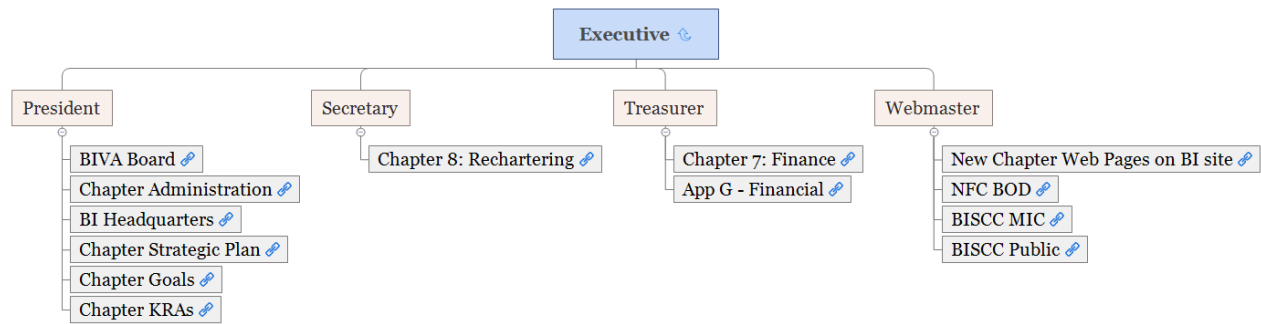
OFFICER TRACK:

At this level, we're dealing with a Voting 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" vice being 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 (a 4-year service "commitment").



Executive:

This is the group of officers whose primary duties are the efficient administration of the business of the chapter. The vice president, in this configuration, is missing from the executive (administrative) world since that function is focused more on mission accomplishment and the achievement of enabling initiatives.



Hyperlinks associated with this section:		
President:	BIVA Board	Chapter Administration
	BI Headquarters	Chapter Strategic Plan
	Chapter Goals	Chapter KRAs
Secretary:	Chapter VII: Rechartering	Club Treasurer Workshop webinar
Treasurer:	Chapter VII: Finance	Investment Club Hub
Webmaster:	New Chapter Web Pages on BI site cannot find	BISCC BOD
	BISCC MIC	

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).



Hyperlinks associated with this section:		
VP-Administration	Volunteer Roster done, BISSC-BOD	Survey Monkey
	CMS	Eventbrite done, link to eventbrite.com
	Websites	Chapter Membership Files
VP-Communications:	Communications/ Publications Done, links to BISSC-BOD, not sure	Go-to-Meeting done, goes to transfer GTM license doc on BISSC-BOD
	BISSC Newsletters Done, linked to BISSC-BOD newsletters?	BISSC Chapter Webpage
	MeetUp	BI Space Coast Chapter Facebook Page
	Marketing Resources	Public Relations Resources
	Communication Tools	Interspire
VP-Membership:	Membership Roster access by chapter president and secretary only (in Volunteer Resources Chapter Operations HO Apps)	Membership Categories
	New Member Growth	Chapter 10: Model Clubs
VP-Training & Education:	Online Tools	BINC done
	Powerpoint templates	Training Workshop
	Teaching Resources	Volunteer Contributions not sure

	<u>Chapter Training Strategy</u>	<u>Chapter Training Program</u>