



Leadership Team—2010

President Pre-Approval Form

Incoming President's Name: _____

Chapter Name: _____

President Expectations

1. Have been a member for a minimum of six months (with the exception of core group members).
2. Be a good, energetic, responsible leader.
3. Display a positive, supportive and professional attitude at all times.
4. Arrive at meetings 15 minutes early to set up the room, greet visitors, and ensure that the meeting effectively starts on time.
5. Follow the BNI Meeting Agenda as outlined in the Leadership Team Manual and as discussed in the Leadership Team Training.
6. Facilitate monthly Leadership Team Meetings and submit the Leadership Team Meeting Report to the BNI Regional Office and Assistant Director.
7. Conduct weekly New Member Orientations after each meeting when a new member is inducted.
8. Coordinate and ensure that the:
 - a. Vice President and Secretary/Treasurer responsibilities are being carried out
 - b. Visitor Host program is effectively carried out
 - c. Membership Committee program is effectively carried out
 - d. Education Coordinator is fulfilling responsibilities
 - e. Event Coordinator is fulfilling responsibilities
 - f. Mentoring Program is conducted within the chapter
 - g. Power Team Program is conducted within the chapter
 - h. PR/Communications Coordinator is fulfilling responsibilities
9. Have e-mail, Internet, Adobe Reader, fax, and Word capabilities.
10. Respond to communication from your Assistant Director and the BNI Regional Office in a timely manner.
11. Order Chapter Supplies as needed.
12. Handle ongoing leadership, motivation, direction, and coaching as required by chapter needs.
13. Communicate with your Assistant Director on a weekly basis (phone or in-person) and cooperate with BNI Headquarters and the BNI Regional Office in their pursuits to improve and maintain the quality of your chapter.
14. Attend mandatory Leadership Team Training.
15. Sign the Leadership Team Agreement Form provided at the Leadership Team Training.
16. Attend monthly Leadership Mindshare sessions, or arrange for a representative to attend in your place.
17. Commit to fulfilling the Presidential duties from (begin date) _____ through (end date) _____.

I agree to fulfill the duties as outlined above. I further agree to attend Leadership Team Training on one of the dates available as indicated on the registration form, as well as conduct Monthly Leadership Team Meetings and attend the monthly Leadership Mindshare beginning in September 2010 (see www.bnioregon.com for schedule).

I also understand that complying with these responsibilities will result in membership compensation for that month successfully completed during my leadership term. I also understand that I will voluntarily step down from the position if, after coaching, I am unable to comply with the requirements of the position.

Incoming President Signature _____ Date _____

Director Signature _____ Date _____

Please return this form by fax to the BNI Regional Office at 503-621-3274 or email to robin@bni.com. Incoming Presidents: Please call your Assistant Director to discuss potential leadership team members. Remember, you must be able to work well with your leadership team in order to have a successful chapter. In addition, your leadership team must have a good working relationship with the BNI Regional Office to get the proper support needed to be a successful chapter. Let's work together to develop a strong leadership team that your chapter will benefit from.



Leadership Team—2010

Vice President Pre-Approval Form

Incoming Vice President's Name: _____

Chapter Name: _____

Vice President Expectations

1. Have been a member for a minimum of six months (with the exception of core group members).
2. Be a good, energetic, responsible leader.
3. Display a positive, supportive and professional attitude at all times.
4. Arrive at meetings 15 minutes early to set up the room, greet visitors, and ensure that the meeting effectively starts on time.
5. Participate in monthly Leadership Team Meetings to discuss non-agenda items outside of the regular meeting.
6. Conduct brief weekly Membership Committee check-ins after each meeting to review applications in progress, potential positions to be filled, and current member issues that need be addressed.
7. Hold monthly Membership Committee Meetings to discuss chapter health; complete and submit monthly Membership Committee Reports to the BNI Regional Office.
8. Keep accurate and current records of chapter attendance, referrals, and visitors and effectively communicate these statistics to the Leadership Team and chapter members as needed.
9. Consistently enforce the attendance policy by making phone calls and sending out reminder letters to the members as needed.
10. Effectively manage and be an active voting member of the Membership Committee.
11. Have e-mail, Internet, Adobe Reader, fax, Excel and Word capabilities.
12. Respond to communication from your Assistant Director and the BNI Regional Office in a timely manner.
13. **Enter all attendance, referrals, visitors, and Thanks for Closed Business records on the online tracking BNI Connect database.**
14. Assist President in providing leadership, motivation, direction, and coaching as required by chapter needs.
15. Communicate and cooperate with the chapter President, Assistant Director, BNI Headquarters and the BNI Regional Office in their pursuits to improve and maintain the quality of your chapter.
16. Attend mandatory Leadership Team Training.
17. Attend the Mid-Term Membership Committee Training (dates to be announced).
18. Sign the Leadership Team Agreement Form provided at the Leadership Team Training.
19. **Ensure that the Membership Committee consists of trained Membership Committee members at all times.**
20. Be available to substitute for the President at the monthly Leadership Mindshare sessions.
21. Commit to fulfilling the Vice Presidential duties from (begin date) _____ through (end date) _____.

I agree to fulfill the duties as outlined above. I further agree to attend Leadership Team Training on one of the dates available as indicated on the registration form.

I also understand that complying with these responsibilities will result in membership compensation for that month successfully completed during my leadership term. I also understand that I will voluntarily step down from the position if, after coaching, I am unable to comply with the requirements of the position.

Incoming Vice President Signature _____ Date _____

Director Signature _____ Date _____

Please return this form by fax to the BNI Regional Office at 503-621-3274 or email to robin@bni.com. Incoming Vice Presidents: Please call your Assistant Director to discuss potential Membership Committee members. Remember, you must be able to work well with your Membership Committee in order to have a successful chapter. In addition, your Membership Committee must have a good working relationship with the BNI Regional Office to get the proper support needed to be a successful chapter. Let's work together to develop a strong leadership team that your chapter will benefit from.



Leadership Team—2010 Secretary/Treasurer Pre-Approval Form

Incoming Secretary/Treasurer's Name: _____

Chapter Name: _____

Secretary/Treasurer Expectations

1. Have been a member for a minimum of six months (with the exception of core group members).
2. Be a good, energetic, responsible leader.
3. Display a positive, supportive and professional attitude at all times.
4. Arrive at meetings 15 minutes early to set up the room, greet visitors, and ensure that the meeting effectively starts on time.
5. In the absence of the President and Vice President, run the chapter meeting using the BNI Meeting Agenda as outlined in the Leadership Team Manual and as discussed in the Leadership Team Training.
6. Participate in monthly Leadership Team meetings to discuss non-agenda items outside of the regular meeting.
7. Announce on a weekly basis whose dues are due in the next two months.
8. Hand out renewal applications to members and collect dues from renewing members on a weekly basis.
9. Maintain a speaker rotation list and announce upcoming speakers on a weekly basis; include chapter director on a regular speaker rotation.
10. Introduce the weekly speakers using updated Member Bio Sheets.
11. Maintain the Speaker Resource Table.
12. Provide a weekly Secretary/Treasurer's Report during each chapter meeting, to include:
 - a. Members whose fees will expire on the first day of the following two months.
 - b. Members who still owe renewal fees
 - c. Members whose memberships have lapsed or been dropped
 - d. The visitor verbatim statement about the investment to join BNI

Note: If there are any questions from visitors during the report regarding the amount or use of the fees, ask the visitor to see you after the meeting. If you or the chapter President cannot answer their questions, refer them to your BNI Director.
13. **Download your chapter's Membership Dues Report from the BNI Connect database, mark corrections clearly in the margin, initial the bottom and fax to the BNI Regional Office at 503-621-3274 or email to bni@bnioregon.com by the 10th of each month.**
14. Accurately, legibly and within 24 hours of a chapter meeting, complete and mail the DART Report with any monies received after each meeting collected.
15. Track, collect, and disburse chapter monthly meeting room/breakfast dues, if applicable.
16. Announce weekly the amount of money in the chapter kitty.
17. Have e-mail, Internet, Adobe Reader, fax, and Word capabilities.
18. Assist President in providing leadership, motivation, direction, and coaching as required by chapter needs.
19. Communicate and cooperate with the chapter President, Assistant Director, BNI Headquarters and the BNI Regional Office in their pursuits to improve and maintain the quality of your chapter.
20. Attend mandatory Leadership Team Training.
21. Sign the Leadership Team Agreement Form provided at the Leadership Team Training.
22. Be available to substitute for the President at the monthly Presidents Mindshare sessions.
23. Commit to fulfilling the Secretary/Treasurer duties from (begin date) _____ through (end date) _____.

I agree to fulfill the duties as outlined above. I further agree to attend Leadership Team Training on one of the dates available as indicated on the registration form.

I fully understand that the chapter kitty, chapter checking account, and any room dues associated with my chapter is my responsibility. I am responsible for collecting chapter room dues and paying the venue on a weekly basis as stated in our chapter contract with the venue. I am responsible for handling any discrepancies within the chapter. I also understand that BNI Oregon & SW Washington is not affiliated with any chapter checking account or room dues accrued by the chapter members.

I also understand that complying with these responsibilities will result in membership compensation for that month successfully completed during my leadership term. I also understand that I will voluntarily step down from the position if, after coaching, I am unable to comply with the requirements of the position.

Incoming Secretary/Treasurer Signature _____ Date _____

Director Signature _____ Date _____

Please return this form by fax to the BNI Regional Office at 503-621-3274 or email to robin@bni.com.



Leadership Team—2010

Cabinet Member Responsibilities

Chapter Name: _____

Incoming Presidents: Share these Cabinet Member Responsibilities with those members who have agreed to the position. Please find members who are willing to fulfill the position through September 30, 2011. All positions must attend mandatory Leadership Team Training and sign the Leadership Team Agreement Form. Insert the member's names next to the appropriate position on the Ratification Form. Email the Ratification Form to your Assistant Director and to robin@bnioregon.com or fax to 503-621-3274 for verification of who will be in the position PRIOR to ratifying the slate within the chapter. Once the slate is approved, please email "SLATE APPROVED" to the BNI Regional Office. If changes are made, please let us know.

Education Coordinator (1 member)

1. Provide or coordinate 2-3 minute Networking Education Moments at each meeting.
2. Work with Leadership Team to address chapter issues through the Networking Education Moment.
3. Work with the Director to provide educational topics that improve and maintain the quality of your chapter.
4. Be responsible for building and maintaining a chapter library.

Event Coordinator (2 members)

1. Schedule chapter social events to build chapter relationships among members.
2. Participate and represent your chapter at regional events such as Open Houses, BNI Picnic/Summer BBQ, and other educational events.
3. Coordinate or find coordinators for the annual Visitor Day process in the spring.
4. Report all local, regional and national BNI events on a weekly basis to chapter members.

Mentor Program Coordinator (1 member)

1. Coordinate mentoring pairs with seasoned and new chapter members.
2. Or, facilitate a group mentoring program within the chapter.
3. Follow up with mentors and mentees to ensure a successful program is delivered.

Power Team Coordinator (1 member)

1. Implement the Power Team Program within the chapter.
2. Communicate with each Power Team Leader to ensure that Power Teams are meeting on a regular basis.
3. Report to the Membership Committee on progress of Power Teams.

PR/Communications Coordinator (1 member)

1. List chapter information in local newspapers and business calendars.
2. Submit press releases to create local publicity for Visitor Days, Member Showcase speakers, and other newsworthy chapter events.
3. Manage the chapter's Facebook page as assigned by the BNI Regional Office.
4. Ensure that the chapter's web page is up-to-date and accurate.

Visitor Host Coordinator (1 member)

1. Arrive at meetings 15 minutes early to set up the room and greet visitors.
2. Ensure Visitor Host supplies arrive at the meeting on time.
3. Order Visitor Host supplies through the Chapter President, as needed.
4. Ensure that Visitor Host—Greeters, Open Networkers, Orientation Facilitators, and Follow Up Specialists carry out their assigned tasks.
5. Participate in monthly Leadership Team Meetings to represent the Visitor Host Team.

Visitor Host—Greeters (2 members)

1. Arrive at meetings 15 minutes early to set up the room and greet visitors.
2. Set up Visitor Host table, sign-in visitors, gather business cards, and set expectations for the visitor's meeting experience.

Visitor Host—Open Networkers (2 members)

1. Arrive at meetings 15 minutes early to set up the room and greet visitors.
2. Assist visitors in finding a place to set their things and give a brief overview of the expectations for the visitor's meeting experience.
3. Introduce visitors to members in their potential Power Team.

Visitor Host—Orientation Facilitators (2 members)

1. Conduct Visitor Orientation toward the end/after each meeting, approximately 15-20 minutes in length.
2. Encourage visitors to submit an application, walking them through the application process and reviewing the membership expectations.

Visitor Host—Follow Up Specialist (1 member)

1. Follow up with each visitor with a personal phone call.
2. And, mail a Thank You card to each visitor.

Membership Committee (6 members)

1. Review applications for potential conflicts.
2. Check business references. Conduct interviews, research, and One-to-Ones.
3. Conduct brief weekly Membership Committee check-in after each meeting to review applications in progress, potential classifications to be filled, and current membership issues that need to be addressed.
4. Maintain confidentiality with applicant and member issues.
5. Participate in monthly Membership Committee meetings.

Note: Two of these members will be Reserves. Membership Committee Reserves participate on the Membership Committee on an as-needed basis, or may fill in should a Membership Committee position become available. They MUST go through training in order to hold this position.