Volunteer Onboarding Guidelines for Chapter Leaders

A Consolidated Guide to Successful SCORE Onboarding

These guidelines are thorough and comprehensive. Leadership at SCORE turns over every 12-24 months, and this document is intended to answer questions as if someone were new to onboarding at SCORE. We encourage use of the table of contents to find the sections most relevant to you and your chapter.

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Volunteer Onboarding Guidelines for Chapter Leaders

I. Introduction – Making the Case

We struggle to grow our chapter memberships yet 70% of all applicants never become volunteers and half of those who do join are gone within a year! Volunteers are the heartbeat of SCORE yet sometimes we are missing and losing great volunteers because we do not treat them properly from the very beginning, we do not accept the changing nature of volunteering or because of other barriers we maintain.

The world has changed and SCORE must change with it or we will become irrelevant.1 The days of having chapters full of retired executives who treat their SCORE volunteering with the passion and commitment of a second career are over. Our applicants are more and more coming from full or partially employed workers and retirees all who lead very active lives with a limited bandwidth for volunteering.

We must treat SCORE and our chapters as our first clients and address these changes in a deliberate and business-like manner.

A. The Problem

- We need volunteers
- We need leaders
- Our applicant pool has changed significantly. Fewer retirees are applying or are available to dedicate the hours they have in the past.
- It currently takes 6.25 applicants to get 2 Provisionals
- Half of them are gone within a year. The net is one active volunteer at a year
- Turnover is high

B. The Solution

Using these guidelines and the new volunteer member classifications will make it easier for our chapter leaders to attract, train and engage a diverse, committed and effective volunteer pool with the high values of SCORE that we all aspire to uphold and sustain.

The intent:

1) Create a more flexible and inclusive SCORE organization for our new generation of volunteers
   a) Four classifications of volunteers. Expanding from one.
   b) Lower barriers to entry including less training time and lower demands.
   c) More effective and efficient onboarding.
   d) Flexibility on time contribution and more virtual (online) mentoring.

2) Deliver a welcoming, engaging and effective onboarding process

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1 Reference the SCORE Futures Project work conducted by the SCORE Board of Directors. See the Volunteer Center and presentations made at the 2017 NLC for slides and audio. https://volunteer.score.org/vc/2017-national-leadership-conference
a) Assign coaches to all provisionals to assist with onboarding.
b) Processes, guides and tools to facilitate training and onboarding.

3) **Ensure uniform commitment to SCORE mission, vision and ethics**
   a) Recruiting for values process and guides.
   b) Clarity of volunteer roles by classification.

Onboarding begins at the very first contact. It may be an online application or a referral from a volunteer. From that moment on the prospect is evaluating us and our chapter. They do not know enough about us yet to determine if SCORE can satisfy their desire to give back to the community. On the other side of that coin we may not know enough about them yet to determine if they might fit our mission, vision and values. Our support and guidance for provisionals helps them to learn how there might be a confluence of interests, motives, values and expectations for them within our chapter.

It is essential that we promptly contact applicants. Further, we must maintain contact with provisional members throughout their training process to help, guide and encourage them. We cannot ignore them!

This guide is a roadmap. Onboarding is not rocket science but it does require good social skills, smart management and strong leadership. The principles and guidelines apply to chapters of all sizes with enough flexibility to be practical. See Section VIII for recommendations on addressing the challenges of Change Management.

If we do nothing else, we must do this for our provisional applicants:

1. Make them feel welcome
2. Assist them with their training to complete the checklist
3. Help them to find their roles within SCORE and engage them in the work of the chapter
4. Help them to build relationships with other volunteers
5. Assist them in becoming part of the social fabric of the chapter

**II. Onboarding Overview**

None of us ever wants to walk into a meeting as a visitor or new member and be ignored and yet this happens all too often as friends talk to friends. Onboarding includes social engagement as well as the technical training and familiarization needed to become a qualified volunteer. Remember that as we drive to increase our diversity to reflect our client base, our new volunteers may very well not look like us or the majority of our current membership. It takes additional effort on our part to help them to overcome that intrinsic barrier.

Engagement is neither automatic nor immediate.

Here is a prototypical SCORE volunteer cycle.

I. In the SCORE Volunteer cycle, candidates approach SCORE with some level of interest and intrinsic motivation. They think that volunteering with SCORE might provide them some benefit. It is essential that we understand that neither they nor SCORE know if there is going to be a fit and a payout from an
investment by them; especially at this early stage. It is important for you to help them to discover the benefits of volunteering throughout the cycle. When at any stage in the process of interacting with SCORE the cost outweighs the benefits they will leave. This is inevitable.

2. Once two people (ideally) in your chapter have interviewed a candidate and introduced him or her to the appropriate membership and/or leadership volunteers, make a decision about accepting them as a provisional member. Give the applicant enough information to make an informed decision. This includes explaining and demonstrating the many benefits of SCORE volunteering as well as the mission, vision, Code of Ethics, training requirements and volunteer contribution expectations.

3. Once accepted, it is imperative, if at all possible, that the provisional member be assigned and introduced to a Coach to help them through the social and technical hurdles of becoming part of the team. The roles of the Coach and the Provisional are covered in section V of this document, and there are Coaching resources on the Volunteer Center. You may wish to use a version of the “Volunteer Orientation Handbook” but recognize that it is about 60 pages long.

4. Continue to engage and re-engage volunteers throughout and beyond the training period. Help them to discover and enjoy the many ways that they can contribute to our mission.

III. Onboarding Process

Here is a simplified flow for onboarding applicants who have been interviewed and accepted for provisional membership as either as mentors or subject matter experts.

1. Assign a Coach to the provisional member. Consider whether the coach is assigned one or more provisional member at a time; smaller chapters may not be able to assign a separate coach to every provisional member. In such cases, the responsibility lies with the chapter leadership to assign aspects of the coaching role to multiple members through clear assignments and expectations.

2. The Coach(es) assist the provisional member through the entire introductory training process. See Section V of this document for more information. The below is a suggested order.
   a. Host them at a chapter meeting and/or have a meeting to introduce them to chapter leadership and other volunteers. Get to know them and help them in getting to know you and the chapter.
   b. Go over the onboarding checklist and give them a copy of the Volunteer Orientation Handbook downloaded from the Volunteer Center. This may be in print or electronic format. Discuss expectations and reach agreement.
   c. Share the onboarding checklist for their classification (mentor, subject matter expert, workshop presenter, and non-client serving volunteer) and show them how to use it.
   d. Assist the provisional member in setting up their appointments for onboarding.

“Training/onboarding was unstructured with no clear direction on expectations or even what step was next. It would have been extremely helpful to have a local onboarding checklist which makes clear who/what is next and when you are ready to take on clients on your own.” Provisional With No Intent to Stay 2017
e. The onboarding process will include orientation and, as appropriate to their classification, co-mentoring sessions, workshops, committee meetings, administrative training, etc.

3. The coach ensures that the provisional goes through an orientation. Orientation may be done individually, in small groups or in cohorts of provisionals as long as there is no unreasonable delay in getting it done. Sample agendas and PowerPoint presentations are available and listed in Section VII of this document. Orientation should cover:
   i. Code of Ethics
   ii. SCORE mission, vision, and values
   iii. How to access and use CORE
   iv. The ways that volunteers can contribute to the SCORE mission and the benefits that volunteers can expect (See list of Volunteer Opportunities)
   v. Local chapter familiarization
   vi. Instruct them on how to use the CORE email system and to check it regularly for chapter and SCORE announcements.
   vii. Give them key phone numbers and emails for leadership.
   viii. Other as appropriate

4. The Coach reports provisional progress regularly (not less than monthly is recommended) to the membership committee and/or the chapter executive committee.

5. The coach recommends provisionals for election to full membership or recommends dropping them when appropriate. Decisions should be made in consultation with the appropriate chapter leaders/chapter executive committee.

Here is an example process flow that you may find useful as a model:

<table>
<thead>
<tr>
<th>Activity</th>
<th>New Vol.</th>
<th>Vol. Coach</th>
<th>Member/Recruiting Chair/Chap Leadership</th>
<th>Admin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate has the idea to consider volunteering</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviews</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decide to volunteer (mutual)</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership decision to accept as provisional</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enter into CORE as a provisional member</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Obtain a SCORE email address and temporary password for access to CORE as appropriate</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensure that Code of Ethics module is completed</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add new volunteer to CC and e-mail lists</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send Chapter Onboarding info</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meet with coach to begin chapter onboarding process</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Invite to coffee groups / activities / committees</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct training</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training completion</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coach recommends membership – Leadership vote</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make active; start client, administrative or other assignments</td>
<td>X X X X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
IV. Volunteer Classifications Including Training Guidelines

Not every volunteer will be a mentor. The following table lays out the training requirements for four different volunteer classifications (Mentor, Volunteer, Subject Matter Expert and Workshop Presenter). Mentoring is our premier service but other specialties are required to deliver training and operate our chapters. Here are the four classifications.

<table>
<thead>
<tr>
<th>Classification</th>
<th>Mentor</th>
<th>Subject Matter Expert</th>
<th>Volunteer</th>
<th>Workshop Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition / Description</td>
<td>A Mentor is qualified to mentor any client including existing businesses and start-up clients. Mentors are proficient in guiding a client of any industry on how to write a business plan.</td>
<td>A Subject Matter Expert has knowledge and experience in a specific set of business skills. They assist clients when those skills are needed. May be lead teachers in their specialties. Co-mentor under the supervision of a Mentor.</td>
<td>SCORE Volunteers work in support of the SCORE mission and vision by handling the myriad of administrative and support tasks required to operate a chapter. Do not mentor clients.</td>
<td>Workshop Presenters do as their title suggests. They present live and online workshops. NOTE: Outside speakers and workshop presenters to NOT have to join SCORE.</td>
</tr>
</tbody>
</table>

It is important to remember that, while certain standards must be met to protect our clients and the SCORE brand, the hurdles that your chapter puts in front of potential volunteers must be reasonable. We are no longer a service corps of retired executives where volunteering is a second career. Our younger, more diverse and more active volunteer base expects to contribute on levels that fit their lifestyles. This means that we will have more volunteers who may be contributing fewer hours in a more flexible and periodic manner, aka microvolunteers.² NOTE: The intent is to make it easier for non-

² Reference the SCORE Futures Project work conducted by the SCORE Board of Directors. See the Volunteer Center and presentations made at the 2017 NLC for slides and audio. https://volunteer.score.org/vc/2017-national-leadership-conference
mentoring volunteers to join and contribute to the chapter while maintaining the highest standards for those volunteers who mentor and teach our clients.

It is important that you not use excessive requirements such as dozens of co-mentoring sessions for mentors. Six should be adequate for you to determine the ability to work independently or in a team. Do not, for example, mandate full days of co-mentoring which essentially bars working applicants from becoming mentors and volunteers. If a provisional and/or coach decide after six mentoring sessions that more are appropriate, do so in a planned manner with specific goals and consideration for the needs of the provisional.

Quantity does not replace quality. Make sure that the co-mentoring sessions are done with qualified mentors who are willing to teach and are able to have a debrief after every session. The debrief does not need to be done in person and can be done by phone or email if needed. The SLATE in Action Mentoring Discussion Guide is highly recommended as a framework for discussion. Encourage reflection and create a culture of a continuous feedback loop.

The following Volunteer Orientation Checklist table lays out the training guidelines for each of the four volunteer classifications. You are not required to have all four classifications of volunteer in your chapter. You must, however, comply with the training requirements for each classification you have.
A. New Volunteer Onboarding Checklist

The Coach and the Provisional along with others in the chapter who are involved in training, onboarding and engagement are responsible for completing this orientation in a timely manner. See the Excel spreadsheets for user-friendly formats of the checklist.

<table>
<thead>
<tr>
<th>TRAINING ELEMENTS</th>
<th>Chapter Owner/Resource</th>
<th>Mentor/Resource</th>
<th>Subject Matter Expert (SME)</th>
<th>Volunteer</th>
<th>Workshop Presenter (WP)</th>
</tr>
</thead>
<tbody>
<tr>
<td>R = Required</td>
<td>O = Optional</td>
<td>Blank = Not Necessary</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Complete the SCORE Online Training Sessions.</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>a. SCORE On-Line 001 - Volunteer Orientation. (12 min.)</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>b. SCORE On-Line 002 - Mission, Vision, Values. (7 min.)</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>c. SCORE On-Line 003 - SCORE Today. (6 min.)</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>d. SCORE On-Line 004 - Code of Ethics. (8.5 Min.)</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>e. SCORE On-Line 005 - Mentor Certification. (61 min.)</td>
<td>Candidate</td>
<td>R</td>
<td>O</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. SCORE On-Line 006 - Introduction to CORE. (12 min.)</td>
<td>Candidate</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. SCORE On-Line 007 - Measuring Success. (6 min.)</td>
<td>Candidate</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. SCORE On-Line 008 – SCORE’s Culture of Inclusion</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>2. Technical training on how to use the website, VC, and CORE</td>
<td>Coach</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>O</td>
</tr>
<tr>
<td>a. SCORE e-mail address <a href="mailto:name@scorevolunteer.org">name@scorevolunteer.org</a></td>
<td>Coach</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>b. Intros to leadership and volunteers – chapter meetings, coffee, committee meetings, etc.</td>
<td>Coach</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>3. Orientation to chapter and SCORE mission, vision, and culture</td>
<td>Coach</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>O</td>
</tr>
<tr>
<td>4. Participate in three (3) Co-Mentor Sessions if possible with different Mentors.</td>
<td>Coach</td>
<td>R</td>
<td>O</td>
<td>O</td>
<td></td>
</tr>
<tr>
<td>5. Participate in three (3) Co-Mentor Sessions as lead + completed Mentor Certification Guide</td>
<td>Coach</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.a. Attend local or online workshop sessions, such as Simple Steps for Starting Your Business (familiarization with small business fundamentals) 6-8 hours for Mentor or ~2 hours for WP</td>
<td>Candidate</td>
<td>R</td>
<td>O</td>
<td>O</td>
<td>R</td>
</tr>
<tr>
<td>7.b. Training for and demonstrated competency in specialist area or admin support area</td>
<td>Candidate</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7.c. Sign the Workshop Presenter Code of Ethics</td>
<td>Candidate</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. All candidates must become familiar with:</td>
<td>Candidate</td>
<td>R</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. SCORE Website – review all tabs</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>b. The National Office</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>c. The National SCORE Volunteer Center.</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>o The Volunteer Center</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>o The Volunteer Handbook</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>o SCORE Standard Operating Manual (in full or part as applies)</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td></td>
</tr>
<tr>
<td>9. Local orientation</td>
<td>Coach+</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
<tr>
<td>10. Complete SCORE profile in CORE</td>
<td>Candidate</td>
<td>R</td>
<td>R</td>
<td>R</td>
<td>R</td>
</tr>
</tbody>
</table>
B. Mentor Classification

Mentor is the title to recognize our new and existing volunteers who have completed full mentor training. Mentor training is more rigorous since mentors work with clients directly. A mentor is qualified to mentor any client including existing businesses and start up clients. Mentors are an essential part of our mission to provide mentoring to our clients.

The significant changes for many chapters that this process brings are the following:

- A move away from past practices that have included, in some cases, the requirement of 15 - 30 co-mentoring observations and other time-intensive activities that make it very hard to become a mentor.
- Formalized process for mentor training including the use of Coaches to guide the training and the use of intentional reflection and analysis (ie by using the SLATE in Action Mentoring Discussion Guide) to support the learning and application of SLATE.
- A formalized process including 3 co-mentoring sessions as the observer followed by 3 sessions as the lead. A debrief after each, ideally using the SLATE in Action Mentoring Discussion Guide.
- An assessment after the 6 sessions with the Provisional and Coach to determine readiness to be certified as a mentor on completion of other training. If additional training is warranted, develop a plan to carry that out.

<table>
<thead>
<tr>
<th>Classification →</th>
<th>Mentor</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition / Description</strong></td>
<td>A mentor is qualified to mentor any client including existing businesses and start-up clients. Mentors are proficient in guiding a client of any industry on how to write a business plan.</td>
</tr>
<tr>
<td><strong>Limitations</strong></td>
<td>None</td>
</tr>
<tr>
<td><strong>Business Card Title</strong></td>
<td>SCORE Certified Mentor</td>
</tr>
<tr>
<td><strong>Example Duties</strong></td>
<td></td>
</tr>
</tbody>
</table>
  - Mentoring  
  - Team Advisory Services  
  - Teaching workshops  
  - Leadership  
  - Administration |
| **Training Elements** | 
  - See the checklist as this may be a significant change for your chapter  
  - Any deviations should be well thought out and consider the changing nature of our volunteer pool. Do not rely on past practice to justify extended demands. |

C. Volunteer

SCORE Volunteers work in support of the SCORE mission and vision by handling the myriad of administrative and support tasks required to operate a chapter. They do not mentor clients so their training does not include the co-mentoring requirements. The training burden is reduced substantially.
This new classification is a major change to recognize that many members do not mentor. Until now all members were expected to be trained as mentors.

<table>
<thead>
<tr>
<th>Classification</th>
<th>Volunteer (Non-Mentoring)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition / Description</td>
<td>SCORE Volunteers work in support of the SCORE mission and vision by handling the myriad of administrative and support tasks required to operate a chapter. These volunteers do not mentor clients.</td>
</tr>
<tr>
<td>Limitations</td>
<td>May not mentor unless Mentor training is completed or unless s/he becomes classified as a Subject Matter Expert</td>
</tr>
<tr>
<td>Business Card Title</td>
<td>SCORE Volunteer</td>
</tr>
<tr>
<td>Example Duties</td>
<td>• Administrative tasks - any</td>
</tr>
<tr>
<td></td>
<td>• Support tasks – any</td>
</tr>
<tr>
<td></td>
<td>• Marketing</td>
</tr>
<tr>
<td></td>
<td>• Webmaster</td>
</tr>
<tr>
<td></td>
<td>• Committee membership and work</td>
</tr>
<tr>
<td></td>
<td>• Community ambassador / outreach</td>
</tr>
<tr>
<td></td>
<td>• Treasurer</td>
</tr>
<tr>
<td></td>
<td>• Leadership</td>
</tr>
<tr>
<td></td>
<td>• Etc.</td>
</tr>
</tbody>
</table>

D. **Subject Matter Expert**

Subject Matter Experts (SME) are those existing and new volunteers who have a skill set that our clients need. SME’s may not be in a position to undergo full mentor training. SME’s can be brought in by mentors to work as co-mentors with clients. Or they may deliver workshops, provide leadership or act in an administrative role. CPA’s, attorneys, tax experts, engineers, teachers and marketers are just a few examples of experts who might be SME’s for your chapter.

This change recognizes that we need to be able to call on experts to assist our clients and our chapters and these experts are probably too busy to complete mentor certification but they do want to contribute to SCORE.
### Workshop Presenter

Workshop Presenters deliver workshops in support of SCORE mission, vision and values. They support the SCORE educational mission and promote the SCORE brand. These volunteers do not mentor clients or have other roles in the chapter. The expectation is that they are skilled presenters with current knowledge that they are willing to share with our clients while complying with the Code of Ethics. Workshop Presenters must not use SCORE to promote their businesses.

This is a new concept for SCORE. The idea is that some experts may wish to be a part of SCORE and contribute by presenting workshops. The hope is that over time as they engage with our clients in workshops they may wish to expand their qualifications to possibly include mentoring or SME.

**NOTE:** Outside speakers do NOT have to join SCORE. They are, however, expected to comply with the non-solicitation language in the SCORE Operating Manual (SOM).

<table>
<thead>
<tr>
<th>Classification →</th>
<th>Workshop Presenter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Definition / Description</strong></td>
<td>Present workshops in support of SCORE mission, vision and values. These volunteers do not mentor clients.</td>
</tr>
<tr>
<td><strong>Limitations</strong></td>
<td>Workshop presentations only. Must complete training to do more.</td>
</tr>
<tr>
<td><strong>Business Card Title</strong></td>
<td>SCORE Workshop Presenter</td>
</tr>
</tbody>
</table>
| **Example Duties** | • Live local workshop presentations  
   • Online workshop presentations  
   • Develop workshop content |
I. How to Qualify Subject Matter Experts and Workshop Presenters

Here are suggestions for how to determine if candidates for these classifications will be able to contribute to the SCORE mission.

- For Subject Matter Experts, they should demonstrate mastery in their field. Consider asking for 1-2 references. Do they have certifications? For social media, do they have a website and/or digital presence?
- For Workshop Presenters, good practice includes reviewing workshop materials and asking the WP to present at a chapter meeting.

V. Coaching Guidelines

A. Chapter Leadership Responsibility

It is incumbent upon chapter leadership to find qualified coaches who will work closely with ALL new volunteers to assist them in becoming a part of the chapter social network as well as helping them to learn the fundamentals of being a productive member. Ideally, each provisional member will have a coach who will guide them through the process. Smaller chapters may need to assign parts of the effort to different volunteers. See Section VII for additional coaching resources. Here is an overview.

Good coaches are a precious resource and very valuable. These coaches need to engage the volunteer and guide them in an increasingly rich engagement with clients and fellow volunteers. They need to take initiative on behalf of their volunteer. The need to be current on their own training requirements. Select your coaches very carefully as they influence the volunteer values and behaviors for years to come. Here are some desirable characteristics of a good coach:

- Desire to serve as a coach – Chapter leadership has thoughtfully asked if the volunteer wants to serve in this additional and critical role
- Sociable and likeable – they are happy to connect with new people
- Good listener – they want to hear what the provisional is interested in and will help them to achieve their goals as a SCORE volunteer
- Motivated – they are motivated to help the provisional, and supportive of the work of the chapter and the SCORE Association
- Flexible – they adapt to the style and needs of the provisional as appropriate
- Engaged – they are engaged in the chapter community and the work of the chapter
- Reliable – they will reliably and consistently communicate with the provisional
- Results-oriented – they will work with the provisional to get the training done
- Familiar – they know how the chapter and SCORE work so they can be a guide and resource
- Knowledgeable – They are familiar with the documents and online training that the provisional member is expected to learn
- Capable – they are a skilled contributor (mentor, subject matter expert, volunteer)

“If your actions inspire others to dream more, learn more, do more and become more, you are a leader”.  

John Quincy Adams
Once these volunteers are identified, they need to receive adequate training so that they can fulfill their responsibility.

B. Recommended Training for New Coaches

Coach training may typically involve:

- Discussing with them the traits of a good coach
- Being aware of the different classifications of volunteers and the training requirements for each
- Reviewing the checklist to ensure that they are aware of the requirements for a new member to move from provisional to active status
- Reviewing the documents that provisional members are expected to review
- Ensuring that they can navigate the SCORE website from both the client and the volunteer perspective so that they can introduce it to the new member and show the new volunteer the resources available to clients and to members. It is especially important to be aware of webinars, templates and documents that mentors can recommend to clients.
- If they are coaching volunteers who will mentor, ensuring that they can navigate CORE, find clients, enter session notes and be familiar with CORE reports
- Providing chapter specific information that they can review with new members (rosters, meeting information, passwords, phone numbers, office duties, etc.)
- Reporting to keep the membership and executive committees up to date on the status of the new member in the onboarding process.

Materials for coaches may include copies of documents they are expected to review with new members, current chapter checklists for completing provisional training, chapter specific handouts for chapter information, and the list below of the roles and responsibilities of a coach. The chapter may decide to provide a binder with all this information when a member agrees to become a coach with additional checklists to use for new members.

The coaching section below can be used to introduce them to this new role. Also use the additional coach resources listed in Section VII of this document.

(The section below is intended to be given to the Coach to guide them through the coaching process.)

C. Becoming a SCORE Coach

A good SCORE coach is one of the most valuable resources a chapter has. You are the welcoming face of SCORE to a new member, the first new friend in a network of strangers, the one who brings them into the circle of chapter volunteers. As you guide them through the process of becoming a fully active and engaged member of SCORE, they come to know and understand our vision, our mission and our values.

Through you, they will learn the qualities we value in SCORE members, the importance of helping our clients achieve their dreams, and the resources we can apply toward achieving those goals. As you convey the chapter culture and create a sense of fellowship, you reinforce with them our value that
“Volunteers Matter.” With each new engaged volunteer, the chapter becomes stronger, more active, and better equipped to sustain itself and reach out to the community to help others.

New volunteers, once they have taken the initiative to contact SCORE and have completed the initial interview process, often want to move forward quickly. You reinforce their enthusiasm when you connect with them quickly, are genuinely happy to work with them, and offer real assistance in moving their training along.

It is important that you understand what motivated them to volunteer and help them to achieve their goals that are consistent with those of SCORE to create a win-win situation.

You were selected by your chapter leadership because they believe that you possess the skills and knowledge to be a good coach. If you are new to coaching, you may not be aware of the new classes of volunteers and the requirements for each class. You may also not be aware of all the activities a provisional member must satisfy before becoming an active member of your chapter. Your chapter leadership should provide you with the information you need, either in the form of structured training or by providing you with appropriate reading material.

As coach, you will be instrumental in determining whether a provisional member becomes an active member. You will help the provisional member determine if they are a good fit for the chapter and, conversely, the leadership/executive committee will rely heavily on your recommendation to accept them or not into the chapter.

See Section VII for additional Coach Resources.

**Your Role as Coach**

Your initial mission as a Coach is to get provisionals onboard, trained and engaged in the SCORE mission as quickly and as well as possible. We have traditionally called out a 90-day provisional period during which new members receive orientation and training. History shows that delays in onboarding lead to higher drop-out rates. Volunteers, Subject Matter Experts and Workshop Presenters could be onboarded in a matter of days to a few weeks. Their training checklists require only an hour at most of online modules. The rest comes down to local familiarization. Mentor training adds the co-mentoring observations as well as technical training like the all-day workshop. Your role is to facilitate these training elements.

- Meet and/or be in touch with the new volunteer on a regular basis
- Monitor their timely completion of the tasks outlined on the onboarding checklist
- Teach specific processes and procedures used at SCORE both at the local and national level
- If they will become mentors,
  - Help them develop necessary skills to be a good mentor
  - Explain and demonstrate the mentoring process during sessions with clients
  - Help them connect with other mentors to participate in mentoring sessions with a variety of mentors
  - Ask questions designed to help them investigate and discover their solutions to problems, rather than just giving them answers
• Facilitate their growth by providing resources and networks
• Periodically assess their level of understanding and ability to implement what they have learned
• Give constructive feedback on how they are progressing
• Listen to constructive feedback on how well you are meeting their expectations as a coach
• Encourage their total development as a SCORE volunteer including participation in other SCORE activities

**What You Can Expect of the Provisional Member**

During their training period you can expect them to:

• Complete the Code of Ethics and other online training modules
• Take the initiative in completing their training tasks as prescribed in this Volunteer Orientation Guide and in the New Volunteer Onboarding Checklist
• Complete role-specific training and become comfortable with their duties
• Develop their own personal style within their role, while adhering to SCORE policies and procedures
• Participate as an active member of the chapter team
• Reach out to you and/or the chapter chair if they have questions or concerns

Some Additional Thoughts:

• Although new volunteers may complete the onboarding process in different sequences, the Coach should be aware of when the new volunteer achieves milestones in the process (i.e. learning about CORE, attending a mentoring session, completing the on-line trainings, etc.) and contact them appropriately.
• Let the new volunteer know that you are available to them after they become an active member; that you will continue to provide guidance and support on an as needed basis. We recommend at least one year.
• Encourage the new mentor to expand their knowledge and skills so that they grow their confidence. As needed, provide constructive feedback.
• Pay attention to signs that the person isn’t committed, i.e. if they can’t find time for training, that is a red flag. Discuss the situation with the new volunteer to determine if the process should continue.

**VI. Provisional and New Member Engagement Best Practices**

Depending on the size and makeup of your chapter, your provisionals and your volunteers, you may find benefit from some of these best practices.

• Interview candidates in person and use the Values-Based Interview Guidelines. Use two interviewers if possible. It is recommended that you ask for a resume. The Values-Based Interview Guidelines can be found in the Volunteer Center.
• Have coffee or a meal with applicants, provisionals and new volunteers.
• Conduct your orientation meetings with more than one provisional and allow deliberate time for networking and getting to know one another. Have committee chairs and other members join the meeting as well. Just make sure that this does not delay onboarding.

• Hold a special meeting before or after your monthly chapter meeting that is devoted to new volunteers that have joined the organization in the past 6 months. This meeting is informal and provides a forum for new members to get to know each other and share tips and tricks they have learned with other new volunteers. Some experienced mentors also attend to supplement the discussion. The Lancaster, PA chapter calls this a New Volunteer Forum.

• Invite the provisionals to attend committee meetings. Pay attention to the interests that they have expressed in their application and in the interview process. Feel free to ask them to join a committee.

• Arrange orientation and other meetings after working hours to accommodate provisionals who are still employed and may not be able to attend many, if any, chapter meetings during the day.

• If the provisional is working or otherwise unavailable during mentoring office hours, make sure that you connect them with mentors who can have them co-mentor and train with them during their ad-hoc mentoring sessions.

• Introduce provisionals and new members to other volunteers who might have shared interests. This may include co-mentoring, project work, administrative tasks, workshop support and so on.

• Maintain the coaching relationship beyond the provisional process. Some chapters ask their coaches to actively maintain that relationship beyond a year to be sure that the new volunteer has access to relationships and information.

“The new members (provisionals) are terrific but many of the certified members seem to be there because it’s a place to go as opposed to helping small business people. They give poor, stale advice and in some cases blatantly wrong input. There should be a requirement for all mentors to undergo training on a regular interval or they should not be able to counsel/mentor. The Provisionals get rated but no one is rating the certified mentors. For many it’s time to park the bus and take away their driver’s license.”  

Provisional with no intent to stay. 2017
### A. Mentoring With Clients: SLATE in Action Mentoring Discussion Guide

The intent of this guide is to assist new volunteers and their trainers in having a conversation about how SLATE is employed during each of the co-mentoring training sessions. New volunteers can use this guide with the mentors they observe and lead with, a coach or representative of the onboarding committee to foster meaningful learning dialogue to help them better understand the SLATE methodology. When a Provisional leads the session during co-mentoring they are the “mentor” in this observation.

<table>
<thead>
<tr>
<th>S</th>
<th>Stop and Suspend Judgment</th>
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<tbody>
<tr>
<td></td>
<td>• Was the purpose of the meeting clearly stated?</td>
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<tr>
<td></td>
<td>• How did the mentor demonstrate his or her focused attention to the client?</td>
</tr>
<tr>
<td></td>
<td>• In what ways did the mentor engage the client?</td>
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<tr>
<td></td>
<td>• How did the mentor suspend judgement while the client spoke?</td>
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<thead>
<tr>
<th>L</th>
<th>Listen and Learn</th>
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<tbody>
<tr>
<td></td>
<td>• In what ways did the mentor exhibit active listening and ask questions to help the client think deeply?</td>
</tr>
<tr>
<td></td>
<td>• How was the mentor learning more about the client’s needs and objectives as time went along?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>A</th>
<th>Assess and Analyze</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• How did the mentor use exploratory dialogue including questions to help the client assess the issues?</td>
</tr>
<tr>
<td></td>
<td>• In what ways did the mentor help the client analyze the issues logically and methodically so that he or she could determine the best course of action?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>T</th>
<th>Test Ideas and Teach with Tools</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• How did the mentor provide opportunities for testing to discover the best idea or to refine an idea?</td>
</tr>
<tr>
<td></td>
<td>• What types of tools did the mentor suggest to expand the client’s knowledge?</td>
</tr>
<tr>
<td></td>
<td>• In what ways did the mentor help the client learn more about his or her idea as the session went along?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>E</th>
<th>Expectations Setting and Encourage the Dream</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• How did the mentor end the session?</td>
</tr>
<tr>
<td></td>
<td>• Were clear expectations and appropriate next steps determined?</td>
</tr>
<tr>
<td></td>
<td>• In what ways did the mentor provide encouragement for entrepreneurship?</td>
</tr>
<tr>
<td></td>
<td>• Did the mentor talk specifically about a next meeting?</td>
</tr>
</tbody>
</table>

**CONSIDER:**

1. Are there any areas of the SLATE methodology where you will have particular strengths?
2. Are there any elements of SLATE that might be areas of weakness for you? If so, how can you improve on these areas?
3. How will you ensure that you are applying the SLATE methodology throughout your mentoring?
4. SLATE is the mentoring process. What about the techical and business related content of mentoring?
   a. Do you know how to find local and national SCORE mentors who can help you with this client in areas you are not expert?
   b. Do you know how to find SCORE and other resources that you can use and/or refer the client to?
   c. Are their areas that you can self-develop with workshops and other training resources such as those on the SCORE.org website and in the SCORE Volunteer Center?
B. Volunteer Opportunities – Every Volunteer Contributes

There are many ways for members to contribute to the SCORE mission.

PROMOTE

Our promotional roles are an opportunity to bring awareness to the SCORE brand, ensure that local entrepreneurs know what services are available to them, and encourage the development of partnerships to help your chapter grow. Examples of roles:

Volunteer Roles

- Community Ambassador
- Development (Partnerships & Fundraising)
- Media Contact for National and Local PR
- Marketing
- Client Engagement

EDUCATE

As an educator who presents workshops, facilitates roundtable discussions, and develops innovative ways to achieve the American dream! Examples of roles:

Mentor, Subject Matter Expert, Workshop Presenter Roles

- Mentor
- Email or video Mentor
- Workshop Facilitator
- Roundtable Facilitator
- Volunteer Educator/Trainer
- Workshop/Event Coordinator

OPERATE

For those who have a knack for inputting data, pulling reports, making arrangements for events, or other administrative duties:

Example Volunteer Roles

- Chapter Administrator
- Treasurer
- Event Facilitator
- IT Administrator
- Recruitment, Retention, New Volunteer HR Coordinator

LEAD

SCORE has many opportunities available for individuals who possess leadership talent and enjoy the thrill of casting vision, rallying individuals toward it, and helping each person see how their unique strengths help fulfill the purpose of SCORE.

The 5 essential leadership roles are:

- Regional Vice President
• District Director
• Assistant District Director
• Chapter Chair
• Assistant Chapter Chair

Other chapter/district leader roles:

• Finance
• Recruitment, Retention & HR Community Outreach,
• Marketing, Development
• Education
• Administration
• Client Services

Here is an example chapter role list. Provisionals are asked to select their roles during training and all volunteers are expected to reaffirm their contributions on an annual basis. Multiple choices are expected. *The minimum volunteer classification training to take on the role is indicated. M= Mentor, V=Volunteer, SME=Subject Matter Expert, W= Workshop Presenter

<table>
<thead>
<tr>
<th>Mark Choices</th>
<th>Role or task</th>
<th>Class*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Serve on a specific administrative capacity in support of chapter operations (e.g. assistant Administrator, Secretary, Treasurer, etc.) scheduling, organizing, etc.</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Regularly mentor clients face-to-face – as evidenced by completed CORE reports</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Regularly mentor clients as an active member of the Email or Video Mentoring program</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Serve on the Membership Committee and actively perform tasks assigned by it*</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Serve on the Marketing Committee and actively perform tasks assigned by it*</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Serve on the Workshop Committee and actively perform tasks assigned by it*</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Serve as workshop faculty</td>
<td>WP/SME</td>
<td></td>
</tr>
<tr>
<td>Assist in our workshops as a mentor, registrar, administrator or other role</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Serve on other committees and working groups as requested by the EC</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Serve as a chapter recruiter, ambassador or advisor in a specific target market or specialty as requested by the Executive Committee (EC)</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Act as a greeter and host for guests at our chapter meetings &amp; events</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Act as a coach to assist probationary members to become full members</td>
<td>M</td>
<td></td>
</tr>
<tr>
<td>Serve on the Speakers Bureau</td>
<td>W</td>
<td></td>
</tr>
<tr>
<td>Participate in chapter programs, workshops and events</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Chapter meeting coordinator (book locations &amp; manage attendance and meals)</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Community relationship development – build relationships with other organizations</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Continuing education for volunteers</td>
<td>WP/SME</td>
<td></td>
</tr>
<tr>
<td>Lead and/or participate in chapter fund-raising</td>
<td>V</td>
<td></td>
</tr>
<tr>
<td>Other: (fill in the blank)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4 Buffalo Niagara SCORE
VII. Available Support Materials - List

Here is a list of resources, templates, lists, presentations and other materials that are available to assist you and your chapter. More are being developed and will be made available on the Volunteer Center:

SCORE HQ
Volunteers
- New Volunteer Onboarding Checklist
- Volunteer Orientation Handbook – Coming by Oct 1, 2018
- Mentor Certification Guide – Coming later in FY19
- Co-Mentoring Observation Form (Observer can use to assess the session)
- SOM – Coming by Oct 1, 2018
- “How to Fill Out Your Profile” – Coming by Oct 1, 2018
- Workshop Presenter Guidelines

Chapter Leaders
- SCORE’s NEW Onboarding Program Overview (PPT deck developed by Beta chapters)
  - Onboarding Program Overview Presentation
- Interviewing
  - Values-Based Interview Guidelines – updated to reflect all four classifications. Coming by Oct 1, 2018
- New Volunteers
  - Welcome Email (HQ)
  - New Prospective Volunteer Email re: SCORE email address (HQ)
  - New Volunteer Application, Email, and CORE Entry Process (HQ)
  - Mission, Vision, Values (HQ)
  - National Impact Infographic (HQ)
  - Megaphone Data (HQ)
  - Training Modules (Contact SCORE Manasota)
- New Volunteer Orientation – Shared by multiple SCORE Chapters
- Coach Training Resources
  - Coaching New Volunteers – Presentation to recruit coaches includes:
    - PPT slides
    - MS Word Handout

Other Resources:
- 90-Day Provisional survey

Local (Still compiling):
- Chapter intake process – extend or modify this document
- Examples of local information for orientation
- Provisional to member congratulations letter
- Sample rejection letter

CORE Training: help.score.org
VIII. Change Management

While it may be tempting to hang on to the fifty plus year history of SCORE when we started with retired executives in social groups seeing SCORE as a second career; that is no longer sustainable in this fast-moving Internet age. Our clients need current knowledge and our applicants want flexibility in how and when they volunteer.⁵

This can be hard to accept for members who are very comfortable with the way things have been for many years.

The Beta testing identified two vital elements of adoption of the Onboarding recommendations laid out in this document (Acceptance and Readiness / Ability).

1) **Acceptance** – Do we want to do this?

Acceptance is that attitude expressed by your leadership and your membership. Do you want to change or would you prefer to fight for the status quo? Your chapter as an average will fall somewhere on the continuum. Certain individuals will hold different opinions and those may be at the extremes. Some may actively work to derail your efforts to adapt your chapter to the new millennium. One question you will have to address is how influential those members at the extremes are and how to move forward.

Consider the following characteristics and honestly rate your chapter on a scale of 1 to 10. Find your place on the horizontal axis of the grid.

<table>
<thead>
<tr>
<th>Low Level of Acceptance (rating = 1)</th>
<th>High Level of Acceptance (rating = 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characterized by:</td>
<td>Characterized by:</td>
</tr>
<tr>
<td>• Happiness with the status quo</td>
<td>• Embrace the future</td>
</tr>
<tr>
<td>• Lack of awareness of SCORE 2025</td>
<td>• Understanding of SCORE 2025</td>
</tr>
<tr>
<td>• Resistance to change; sees no value in the changes</td>
<td>• Capable of change</td>
</tr>
<tr>
<td>• Active or passive pushback from leaders and members</td>
<td>• Active engagement by leaders and members</td>
</tr>
</tbody>
</table>

2) **Readiness / Ability** – Can we do this?

Readiness / Ability is the functional capacity of the chapter to implement the changes. A high level is represented by chapters that have fully functioning committees and have been following the fundamentals of this Onboarding program for years.

Consider the following characteristics and honestly rate your chapter on a scale of 1 to 10. Find your place on the horizontal axis of the grid.

---

⁵ Reference the SCORE Futures Project work conducted by the SCORE Board of Directors. See the Volunteer Center and presentations made at the 2017 NLC for slides and audio. [https://volunteer.score.org/vc/2017-national-leadership-conference](https://volunteer.score.org/vc/2017-national-leadership-conference)
<table>
<thead>
<tr>
<th>Low Level of Readiness / Ability (rating = 1)</th>
<th>High Level of Readiness / Ability (rating = 10)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characterized by:</td>
<td>Characterized by:</td>
</tr>
<tr>
<td>• Need a Membership Committee</td>
<td>• Strong functioning Membership Committee</td>
</tr>
<tr>
<td>• No Coaches in place</td>
<td>• Strong chapter leadership</td>
</tr>
<tr>
<td>• Chapter leadership needs development</td>
<td>• Coaches trained and in place</td>
</tr>
</tbody>
</table>

Now that you have rated your chapter on these two axes, find your place on this grid.

The quadrant that you lie in will help to determine the strategies you can use to achieve implementation.

See the following for strategies.

**Quadrant 1** – Relatively Low Acceptance with Relatively High Readiness/Ability

This would imply that you have a well-functioning membership committee and a coaching program in place but there is resistance to accepting the changes recommended in this document. Here are some suggested strategies:

1. Review the Futures Project information and discuss the implications with your leadership and your membership.
2. Recognize that the status quo may have to change to sustain and grow for the future.
3. Review this set of guidelines. Identify the personal, organizational and structural roadblocks and develop a business-like operating plan that incorporates evolution.
4. Work on that plan implementation as a team. Monitor and manage your progress.
5. Individuals who are unable to accept the change after reasonable discussion and evaluation may need to be moved to other roles.

**Quadrant 2** – Relatively High Acceptance with Relatively High Readiness/Ability

This would imply that you not only have a well-functioning membership committee and a coaching program in place but there is also a desire to improve that process by implementing these practices. Here are some suggested strategies:

1. Review the Futures Project information and discuss the implications with your leadership and your membership.
2. Look for opportunities to sustain and grow for the future.
3. Review this set of guidelines. Identify the personal, organizational and structural opportunities to incorporate these practices.
4. Work on continuous improvement with a plan as a team. Monitor and manage your progress.
5. Work toward sustainability over time.
**Quadrant 3 – Relatively High Acceptance with Relatively Low Readiness/Ability**

This would imply that you are motivated to move ahead but do not have the well-functioning membership committee and a coaching program in place. Or your chapter is so small, so new or in recovery that the resources and structures are just not in place. Here are some suggested strategies:

1. Apply the best practices that you can.
2. Start with the volunteers you have to interview, welcome and coach provisionals. This will help you to build your membership resources.
3. Be open to the possibility that very new members (mentors and volunteers) may be able to contribute to onboarding as members of the membership committee and even coaching.
4. Use this on-the-job training to develop your teams and expand as you can.
5. Use the Volunteer classification to bring on and engage members for marketing, recruiting and workshop support as well as other chapter operations.
6. Use the Workshop Presenter classification to expand your workshop program as this is one of the best ways to attract both clients and members.
7. Some chapters do not yet have enough new clients to efficiently conduct co-mentor training. Use video mentoring within your chapter and with other chapters to supplement the traditional face-to-face in-person mentoring.

**Quadrant 4 – Relatively Low Acceptance with Relatively Low Readiness/Ability**

This would imply that you are not motivated to move ahead and do not have a well-functioning membership committee and a coaching program in place. Or, as seen in some chapters, there is so much pressure to maintain the status quo that membership recruiting has stalled. Single individuals can and have effectively stopped recruiting at chapters.

1. Review the Futures Project information and discuss the implications with your leadership and your membership.
2. Recognize that the status quo may have to change to sustain and grow for the future.
3. Review this set of guidelines. Identify the personal, organizational and structural roadblocks and develop a business-like operating plan that incorporates evolution.
4. Work on that plan implementation as a team. Monitor and manage your progress.
5. Individuals who are unable to accept the change after reasonable discussion and evaluation may need to be moved to other roles.
**Summary:** Change is not easy. The graphic to the right shows the experience of our 16 Beta test chapters. They range from small to large and from brand new to founding chapters.

One key is to have the conversations and to treat your chapter like it is your most important client. Operate in a business-like manner.

Yes, this has implications to your culture. Find solutions to make those implications a positive rather than to focus on the negative.

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**IX. The Future and Next Steps**

Additional training materials are under development and will be rolled out through FY 2019 and beyond. Your input to best practices will be appreciated. Help us to make this even better.

Work is underway to see if there are better approaches to recruiting. The hope is that we will be able to attract more members who are committed to our mission and vision and are in a position to come onboard and contribute in meaningful ways.

The Beta testing in FY 2018 and broader use in FY 2019 is informing the design and roll-out of the Salesforce replacement for CORE. That interaction will continue as Salesforce is expanded to make it easier to onboard and monitor membership.

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**X. Foundation for this Onboarding Program**

This is a grassroots program that has involved many hundreds of volunteer and staff hours over a span of several years to bring to this point. A special credit goes to the great many unnamed volunteers at the 24 chapters that contributed best practices including the 16 who tested this for over half a year. A dozen volunteer members of the National Advisory Council and staff were the motive force behind building this. It is built by SCORE for SCORE; for our future. Here are key milestones:

- Groundwork for understanding the volunteer experience begun in 2015
- National Advisory Council Team formed October 2016
- Prototype materials developed based on chapter experiences and best practices
- Onboarding introduced at August 2017 National Leadership Conference and test chapters were recruited
- 16 Chapters testing and refining onboarding materials and processes since November 2017
Primary Contributors to this program:

Beta Chapters – 16 testing the prototype materials beginning in October 2017
1. Washington DC
2. Boston
3. Columbus
4. Houston
5. Charlotte
6. NE New Jersey
7. Dayton
8. Pinellas
9. Manasota
10. Wichita
11. Palm Beach
12. Midlands
13. Montgomery County
14. Greater Aiken
15. Yankton, SD
16. New York City

Additional Chapters Contributing
• Portland, Maine
• Las Vegas
• Lancaster
• Kansas City
• Silicon Valley
• Charlotte
• Greater Seattle
• Buffalo Niagara
• Fox Valley
• Many more

Advisory Council (AC) & Staff Team
• Steven Martin, volunteer AC – current team
• Susan Fort, staff – current team
• Kathryn Kelly, staff – current team
• Raubia Nouristani, staff – current team
• Julie Poland, volunteer AC – current – coaching team
• Marilyn Scott, volunteer AC – current – coaching team
• Eileen Buchanan, volunteer AC
• Ann Witty, volunteer AC
• Hugh McMaster, volunteer AC
• Bill Morland, volunteer AC
• Lori Murphy, volunteer AC 2017
• Andrew Beamon, staff
• Many more