Mid Atlantic Region

- Background & Regional Discussion 10 mins
  - NLC Key Take-away
- The Well-Run Chapter 10 mins
- Chapter Chair Focus Group Sessions 20 mins
  - Leadership
  - Volunteer Engagement
  - Client Engagement
  - Community Engagement
  - Admin Excellence
- Focus Group Discussion 25 mins
- Regional Support: Organization 10 mins
- Housekeeping & Wrap-up 5 mins
Values, Beliefs and How We Act.

Clients Matter: Our clients’ success is our success.

Small Business Matters
Small business is the engine of our national economy through business formation, job creation and wealth building. Small businesses and their support are critical to vibrant communities in our society.

Giving Back Matters
We give volunteers, stakeholders and sponsors the ability to give back to communities through their support of SCORE. Successful small business owners understand the importance of giving back to their communities.

Volunteers Matter
SCORE is volunteer business people helping small business people solve business problems. Volunteers give freely of their time, energy and knowledge to help others. SCORE volunteers donate over 1 million hours of their time each year to support their communities.

Experience Matters
A client's experience matters – the truest measure of our mission and our service – we ensure that our clients have a positive experience. A volunteer's experience matters – their relevant knowledge, wisdom and experience serve our clients through mentorship and education. A volunteer's experience with SCORE matters – we ensure that volunteers find value and satisfaction while engaged with SCORE.

Relationships Matter
In relationships, we act with integrity, respect, honesty, purpose, and professionalism. We listen with an open mind, encourage and openly communicate with all people seeking help from SCORE. Personal, long-term relationships are a driver of small business success. Community alliances are critical to the success of SCORE.

Diversity Matters
We believe in the importance, value and power of diversity – diversity of people and diversity of thought. The diversity of race, gender, ethnicity, geography, and experience is important and valuable in SCORE. We strive to achieve diversity of our volunteer corps, staff, board and clients.

Lifelong Learning Matters
We believe that small business owners who are lifelong learners adapt to change more readily and are more successful. Volunteers as lifelong learners remain relevant, achieve personal satisfaction and growth.
Values, Beliefs and How We Act.

Clients Matter: Our clients’ success is our success.

Small Business Matters
Small business is the engine of our national economy through business formation, job creation and wealth building. Small businesses and their support are critical to vibrant communities.

Giving Back Matters
We give volunteers, stakeholders and sponsors the ability to give back to communities through their support of SCORE. Successful small business owners understand the importance of giving back to their communities.

Volunteers Matter
SCORE is volunteer business people helping small business people solve business problems. Volunteers give freely of their time, energy and knowledge to help others. SCORE volunteers donate over 1 million hours of their time each year to support their communities.

Experience Matters
A client’s experience matters—the truest measure of our mission and our service—we ensure that our clients have a positive experience. A volunteer’s experience matters—their relevant knowledge, wisdom and experience serve our clients through mentorship and education. A volunteer’s experience with SCORE matters—we ensure that volunteers find value and satisfaction while providing help to others.

Relationships Matter
In relationships, we act with integrity, respect, honesty, purpose, and professionalism. We listen with an open mind, encourage and openly communicate with all people seeking help from SCORE. Personal, long-term relationships are a driver of small business success. Community alliances are important and valuable in SCORE. We strive to achieve diversity of our relationships.

Diversity Matters
We believe in the importance, value and power of diversity—diversity of people and diversity of thought. The diversity of race, gender, ethnicity, geography, and experience is important and valuable in SCORE. Volunteers as lifelong learners remain relevant.

Lifelong Learning Matters
We believe that small business owners who are lifetime learners adapt to change more readily and are more successful. Volunteers as lifelong learners remain relevant.

Growth Matters!
Values, Beliefs and How We Act.

Clients Matter:
Our clients’ success is our success.

Growth Matters!
How we manage our Chapters Matters!
Well-Run Chapter
The Well-Run Chapter Grows the Right Way

Leadership
Chapter Chair

Compliance / Strategy / Performance / Membership
Well-Run Chapter

Leadership

Chapter Chair

Leadership Team
Finance / Membership / Admin / Marketing
Well-Run Chapter

Leadership

Chapter Chair

Leadership Team
Finance / Membership / Admin / Marketing

Volunteer Engagement
Recruit / Retain

Client Engagement
Mentor / Workshop

Community Engagement
Outreach / Marketing
Well-Run Chapter

Leadership

Chapter Chair

Leadership Team
Finance / Membership / Admin / Marketing

Volunteer Engagement
Recruit / Retain

Client Engagement
Mentor / Workshop

Community Engagement
Outreach / Marketing

Admin
Timely / Professional
Compliance & Performance
Well-Run Chapter

Leadership

Chapter Chair

Leadership Team
Finance / Membership / Admin / Marketing

Volunteer Engagement
Recruit / Retain

Client Engagement
Mentor / Workshop

Community Engagement
Outreach / Marketing

Chapter Initiatives

Regional & National Support

Admin
Timely & Professional
Compliance & Performance
## CC Survey: What are Impediments?

<table>
<thead>
<tr>
<th>Area of Support</th>
<th>Support Requested</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RECRUITMENT</strong></td>
<td>Volunteer Recruitment</td>
</tr>
<tr>
<td></td>
<td>Volunteer Engagement</td>
</tr>
<tr>
<td><strong>MARKETING</strong></td>
<td>Marketing Tools for Attracting Volunteers</td>
</tr>
<tr>
<td></td>
<td>Public Relations Resources</td>
</tr>
<tr>
<td></td>
<td>Email and Online Marketing</td>
</tr>
<tr>
<td></td>
<td>Referral Building and Community Outreach</td>
</tr>
<tr>
<td><strong>LEADERSHIP</strong></td>
<td>Recruiting for Leadership</td>
</tr>
<tr>
<td></td>
<td>Succession Planning for Leaders</td>
</tr>
<tr>
<td><strong>WORKSHOPS</strong></td>
<td>Developing local partner specific programs (such as Mayor’s breakfast, women’s cohort, etc.)</td>
</tr>
<tr>
<td><strong>CORE</strong></td>
<td>CORE: Advanced Support</td>
</tr>
<tr>
<td></td>
<td>CORE: Basic Support</td>
</tr>
<tr>
<td><strong>FINANCE</strong></td>
<td>Funding Opportunities (district allocations, internal grants)</td>
</tr>
<tr>
<td><strong>MENTORING MODELS</strong></td>
<td>CEO Roundtables</td>
</tr>
<tr>
<td><strong>VOLUNTEER EDUCATION</strong></td>
<td>Organizing Training Events</td>
</tr>
<tr>
<td></td>
<td>Generational Differences</td>
</tr>
</tbody>
</table>
Focus Groups

• 5 Focus Groups
  – 20 Minutes

• Report to Larger Group
  – 5 minute discussion per group

• 2 Goals for each Group:
  – Identify 2-3 Opportunities to make a Chapter “Well Run”
  – Give the Regional team direction on where to help
Focus Groups

With respect to **Leadership**, the Well-Run Chapter …

– How do we ensure we build and sustain a well-run Chapter?
  • Chair
  • Exec team
  • Functional Committees
  • Succession
Focus Groups

With respect to **Volunteers** and the Well-Run Chapter …

– How do we build and retain strong, skilled, diverse and engaged membership teams?
  
  • Recruiting
  • On-Boarding
  • Diversity: gender, skills
  • Retaining
Focus Groups

With respect to **Client Services**, and the Well-Run Chapter …

– How do we grow, stay vital and relevant within our community?

  • Growing total services
  • Ensuring quality of services
  • Workshops & Seminars
Focus Groups

With respect to our local **Community** and the Well Run Chapter …

– How do build awareness of SCORE as the “Go-to-Source” for small business
  • Outreach programs
  • Advertising & Marketing programs
  • Use of Constant Contact
Focus Groups

With respect to Admin and the Well-Run Chapter …

– How do we ensure a timely and professional management of client and member needs?
  • Clients Not Yet Counseled
  • Calendar management
  • Financial controls
Focus Group Report & Discussion
5 minutes per Group

• Leadership
• Volunteers
• Clients
• Community
• Admin
SCORE Mid-Atlantic Regional Support Team

Steve Records
SCORE National

Gene Murtha RVP Mid Atlantic Region
Leadership, Performance, Compliance

Regional Finance
Regional Volunteers
Regional Clients
Regional Marketing
Regional Admin
Chapter Chairs
SCORE Mid-Atlantic Regional Support Team

Steve Records
SCORE National

Gene Murtha RVP Mid Atlantic Region
Leadership, Performance, Compliance

Regional Finance
Regional Volunteers
Regional Clients
Regional Marketing
Regional Admin
Chapter Chairs

Nathan Idio
Nathanusoro.idio@scorevolunteer.org
803-665-4893
Mid-Atlantic Regional Budget Allocations flow process as of August 15, 2017

- Regional Financial Funding (from SCORE Association's yearly budget allocations)
- District Financial Funding (from Regional Budget allocations)
- Chapter Financial Funding (from District Budget allocations)
- District Headquarters (HQ) Financial Funding (from District Budget allocation)
- Volunteer/Functional/Departmental Funding (from Chapter Budget allocations)
Chapter Level Processing Flow

Initiate and process Form 14s & 100s (from both Chapter & Volunteer) through District (chapter actions) and directly to SCORE National (Volunteer actions)

Process Insurance Policy Payment Requests through District

Process other supplementary forms & requests through District

Administrate Receipt and expenditure of allocated Chapter budget funds

KEY Actions:
- All expressed Chapter actions must be generated from this level except those actions peculiar only to District or Regional needs
- Action generation for the benefit of Volunteers or Chapter
- All actions must be authorized by Chapter Chair or his/her appointee (usually Treasurer)

District Level Processing Flow

Authorize and process all request, actions sent from Chapter to District for onward processing to National

Authorize Budget allocations and re-allocations to Chapters with proper accountability and oversight

Assist Chapters and SCORE National on end of fiscal year auditing (Form 3') and accounts reconciliations, coordination, support actions, and processes monitoring

Execute all Financial & Fiscal policies as promulgated by Region and SCORE

Advise and recommend processes, strategic directions, and request to SCORE National

KEY Actions:
- All expressed District actions must be generated from this level except those actions peculiar only to Regional needs.
- Action generation for the benefit of District, District Headquarters, and Chapter benefits.
- All actions must be authorized by District Director or his/her appointee – usually District Treasurer/Financial Controller/ADD

Regional Level Processing Flow

Authorize and process all request, actions sent from District for onward processing to National

Assist Districts and SCORE National on overall Financial and accounting mission and vision coordination, support actions, and processing monitoring

Advise and recommend financial and accounting processes, strategic directions, and request through both SCORE National and down the District

In-Charge of overall regional financial oversight and well-being of District' Financial and Accounting systems and Structure

KEY Actions:
- All expressed Region actions must be generated from this level.
- Action generation for the benefit of the Region, District, and Chapter benefits.
- All actions must be authorized by Regional Vice President or his/her appointee – usually Regional Director of Finance & Regional Executive Committee Member

Current State (as of August 15, 2017)
Regional Budget Allocations (from SCORE Association's yearly budget allocations)

Volunteer/Functional/Departmental Funding (from Chapter Budget allocations)

Chapter Budget allocations (from Regional Budget allocations)
Changed state (after August 15, 2017)

**Chapter Level Processing Flow**
- Initiate and process Form 14s & 100s (from both Chapter & Volunteer) through District (chapter actions) and directly to SCORE National (Volunteer actions)
- Process Insurance Policy Payment Requests through District
- Process Form 3s through National with monitoring and supervision from District
- Process other supplementary forms & requests through District
- Administrate Receipt and expenditure of allocated Chapter budget funds

**District Level Processing Flow**
- KEY Actions:
  - All expressed Chapter actions must be generated from this level except those actions peculiar only to District or Regional needs
  - Action generation for the benefit of Volunteers or Chapter
  - All actions must be authorized by Chapter Chair or his/her appointee (usually Treasurer)

**Regional Level Processing Flow**
- ****** All District level Financial, Fiscal, and Accounting processes migrating to Regional Financial office (Regional Director of Finance)****
- Authorize and process all request, actions sent from Chapter(s) for onward processing to National with signatory privileges resting on the Regional Financial office
- Assist Chapter(s) and SCORE National on overall Financial and accounting mission and vision coordination, support actions, and processing monitoring with Chapter(s) reporting Financial status and concerns directly to Regional financial office
- In-Charge of overall financial oversight and well-being of Chapter Financial and Accounting systems and Structure
- Assign Budget allocations and reallocations directly to Chapters with proper accountability and oversight - Responsibilities placed with Region
- Inherit, manage, and administer all Chapter Financial processes and privileges - Responsibilities placed with Region

**KEY Actions:**
- All expressed Region actions must be generated from this level
- Action generation for the benefit of the Region, and Chapter(s)
- All actions must be authorized by Regional Vice President or his/her appointee – usually Regional Director of Finance (Regional Leadership Committee Member)
Housekeeping Check

• FY 17 Budgets
  – Spend it before you lose it

• FY 18 Budget Process
  – Send Form 14 to Nathan as Regional Director of Finance
  – Nathan will approve and send to Herndon
  – Nathan will track against allocation, ask for projections

• Performance: Chapter Dashboard
**SCORE Dashboard Performance Report**  
**Fiscal Year:** 2017  
**Month:** Jul

### Go to District Reports

<table>
<thead>
<tr>
<th>Metrics</th>
<th>Jul 2017</th>
<th>Jul 2016</th>
<th>FY 2017</th>
<th>FY 2016</th>
<th>YTD Change vs. FY 2016</th>
<th>YTD % Change vs. FY 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client Data</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Unique Clients Served</td>
<td>15,901</td>
<td>16,098</td>
<td>116,248</td>
<td>121,245</td>
<td>-4,997</td>
<td>-4.12</td>
</tr>
<tr>
<td>Total Unique Clients Served Local Mentoring</td>
<td>15,025</td>
<td>14,855</td>
<td>110,155</td>
<td>111,707</td>
<td>-1,552</td>
<td>-1.39</td>
</tr>
<tr>
<td>Total Unique Clients Served Nat Email Mentoring</td>
<td>876</td>
<td>1,243</td>
<td>6,093</td>
<td>9,538</td>
<td>-3,445</td>
<td>-36.12</td>
</tr>
<tr>
<td>Total Unique Clients Served Local Workshops</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Clients Served – National Workshops</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Sessions / Workshops Data</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Mentoring Sessions</td>
<td>22,389</td>
<td>30,555</td>
<td>247,109</td>
<td>252,013</td>
<td>-4,904</td>
<td>-1.95</td>
</tr>
<tr>
<td>Total Workshops Held</td>
<td>867</td>
<td>827</td>
<td>10,683</td>
<td>10,479</td>
<td>204</td>
<td>1.95</td>
</tr>
<tr>
<td><strong>Follow On and Quality Data</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Client ‘One &amp; Done’ Rate - YTD</td>
<td></td>
<td></td>
<td>62.09%</td>
<td>63.32%</td>
<td>-1.22%</td>
<td>-1.93</td>
</tr>
<tr>
<td>Session Follow On Rate</td>
<td>56.09%</td>
<td>67.34%</td>
<td>57.61%</td>
<td>55.98%</td>
<td>1.63%</td>
<td>2.91%</td>
</tr>
<tr>
<td>Net Promoter Score (NPS)</td>
<td>83.38</td>
<td>82.52</td>
<td>84.16</td>
<td>82.10</td>
<td>2.05</td>
<td>2.50%</td>
</tr>
<tr>
<td>Long Term Clients (3 hours mentored)</td>
<td>2,363</td>
<td>2,562</td>
<td>28,073</td>
<td>28,766</td>
<td>-693</td>
<td>-2.41</td>
</tr>
<tr>
<td><em>In Business</em> Clients %</td>
<td>37.29%</td>
<td>34.61%</td>
<td>35.39%</td>
<td>32.10%</td>
<td>3.29%</td>
<td>10.26%</td>
</tr>
<tr>
<td>Client ‘One &amp; Done’ Rate - Lifetime Historical</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Volunteer Data</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Active Volunteers</td>
<td>10,317</td>
<td>9,649</td>
<td>13,130</td>
<td>12,750</td>
<td>380</td>
<td>2.98%</td>
</tr>
<tr>
<td>New Volunteers</td>
<td>237</td>
<td>222</td>
<td>2,663</td>
<td>2,675</td>
<td>-12</td>
<td>-0.45</td>
</tr>
<tr>
<td>Volunteer Certification %</td>
<td>89.23%</td>
<td>68.78%</td>
<td>85.29%</td>
<td>80.06%</td>
<td>5.22%</td>
<td>6.52%</td>
</tr>
<tr>
<td>Volunteer Certification % - Active Only</td>
<td>97.41%</td>
<td>96.91%</td>
<td>97.41%</td>
<td>96.91%</td>
<td>0.50%</td>
<td>0.52%</td>
</tr>
<tr>
<td>% of Women &amp; Minority Volunteers</td>
<td>26.53%</td>
<td>25.19%</td>
<td>28.01%</td>
<td>25.65%</td>
<td>2.36%</td>
<td>9.19%</td>
</tr>
<tr>
<td>Total Volunteer Mentoring Hours</td>
<td>27,664</td>
<td>35,972</td>
<td>301,948</td>
<td>313,305</td>
<td>-11,357</td>
<td>-3.62%</td>
</tr>
</tbody>
</table>

**Run On:** 08/07/2017  
**Report Source:** Dashboard_Report_National.rptdesign  
**Page 1 of**
Housekeeping Check

• Compliance
  – COE & SLATE: sine qua non
  – “Roster Integrity”: members should be volunteering and in compliance
  – Goals and Leadership into CORE

• Communication
  – Use @scorevolunteer.org address
  – Request: Add your contact info as an e-signature in footer with Chapter and phone

• Dates
  – On-site meetings over the next weeks
  – Regional meeting March
Baltimore, Maryland
August 13 – 15, 2017

Thank you for your service to SCORE & our Clients