

B 1

Welcome to the BI Online Chapter Volunteer Orientation Meeting 5 March 2019



The image shows a tablet on a wooden desk. The screen displays the text: "make decisions", "representatives of", "board of directors", "a body of elected", "appointed members", and "activities of". A fountain pen, a calculator, and a pair of glasses are also visible on the desk.

1

B 2

Disclaimer

- The information in this presentation is for educational purposes only and is not intended to be a recommendation to purchase or sell any of the stocks, mutual funds, or other securities that may be referenced. The securities of companies referenced or featured in the seminar materials are for illustrative purposes only and are not to be considered endorsed or recommended for purchase or sale by BetterInvesting National Association of Investors Corporation ("BI"). The views expressed are those of the instructors, commentators, guests and participants, as the case may be, and do not necessarily represent those of BetterInvesting. Investors should conduct their own review and analysis of any company of interest before making an investment decision.
- Securities discussed may be held by the instructors in their own personal portfolios or in those of their clients. BI presenters and volunteers are held to a strict code of conduct that precludes benefiting financially from educational presentations or public activities via any BetterInvesting programs, events and/or educational sessions in which they participate. Any violation is strictly prohibited and should be reported to the CEO of BetterInvesting or the Director of Chapter Relations.
- This presentation may contain images of websites and products or services not endorsed by BetterInvesting. The presenter is not endorsing or promoting the use of these websites, products or services.
- **This session is being recorded for future use.**

2

B 3

Agenda

1. Welcome & Introductions
2. Chair's Report (Joan)
 - a. Region & Chapter Realignment
 - b. OLC Mission
3. President's Report (Jane)
 - a. OLC Membership Overview
 - b. Organizational Structure
 - c. Volunteer Support
4. OLC web page tour (Dennis)
5. Questions
6. Future meetings

3

B 4

REGION & CHAPTER REALIGNMENT PROGRAM

4

B 5

Why Realignment of Chapters and Regions?

- Strong & viable chapter to serve members and clubs and fulfill the organization's mission
- Serve members/clubs in areas with no local chapter
- Provide clear direction to chapters
- Provide needed training and resources to volunteers
- Manageable structure

New Volunteer and Chapter Structure
presented at BINC 2018, Orlando Florida

Pat Donnelly
Chair, BetterInvesting Volunteer Advisory Board
Kamie Zaracki
CEO, BetterInvesting

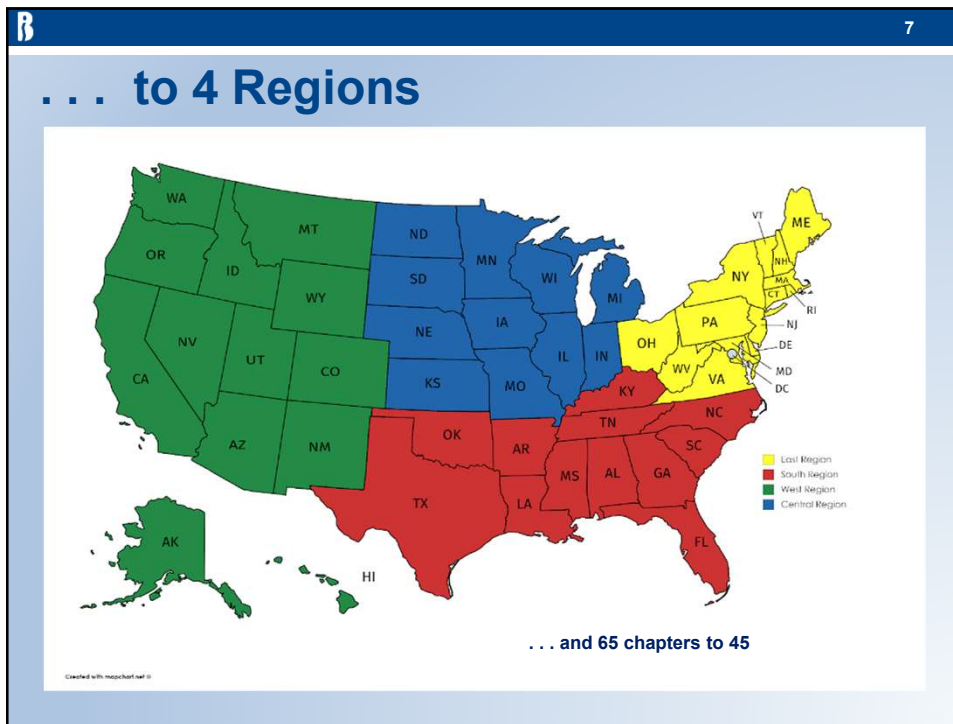
5

B 6

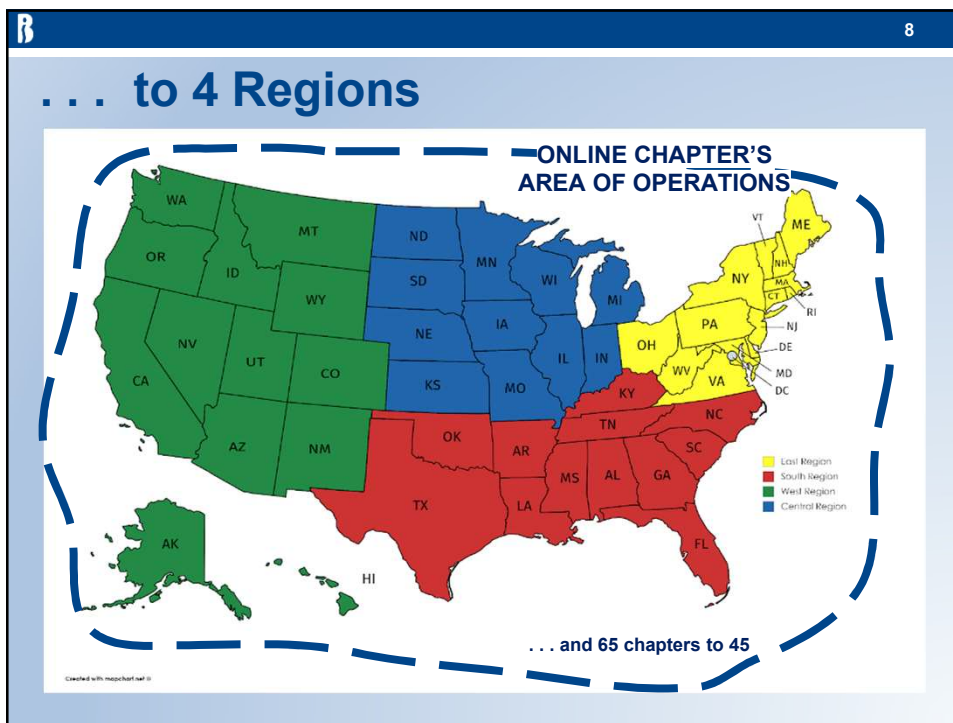
BI Regions: from 7 Regions . . .

Region & Chapter Boundaries (August 2015)


6




7



8

 9					
Focus on proven Chapter success metrics					
Objective	Required	Education		Club Support	Outreach
		Member	Public		
Model Club	Yes	X	X		X
Visit A Club	Yes			X	X
Club Visits	Yes	X		X	
Money Smart Week	Yes		X		X
Annual Planning Meeting	Yes	Administrative Activity			
Rechartering	Yes	Administrative Activity			
Education Programs & Other	Yes No	X	X	X	X

9

 10	
<h1 style="margin: 0;">ONLINE CHAPTER'S MISSION</h1>	

10

B 11

BetterInvesting's Mission Statement

Is to provide a program of sound investment information, education, and support that helps create successful lifetime investors

11

B 12

Same ... but unique

We have the same mission as all other BetterInvesting Chapters

Our members are geographically dispersed across the US and world-wide

We're large – more than twice the size of the largest BI chapter

We are building this unique chapter

TOGETHER

12

B 13

DRAFT Online Chapter's Mission Statement

- BI's Mission focusing on individuals, club members, volunteers and outreach programs
- To be an exemplar for all BetterInventing chapters for creating and demonstrating best practices in providing these services in an online environment

13

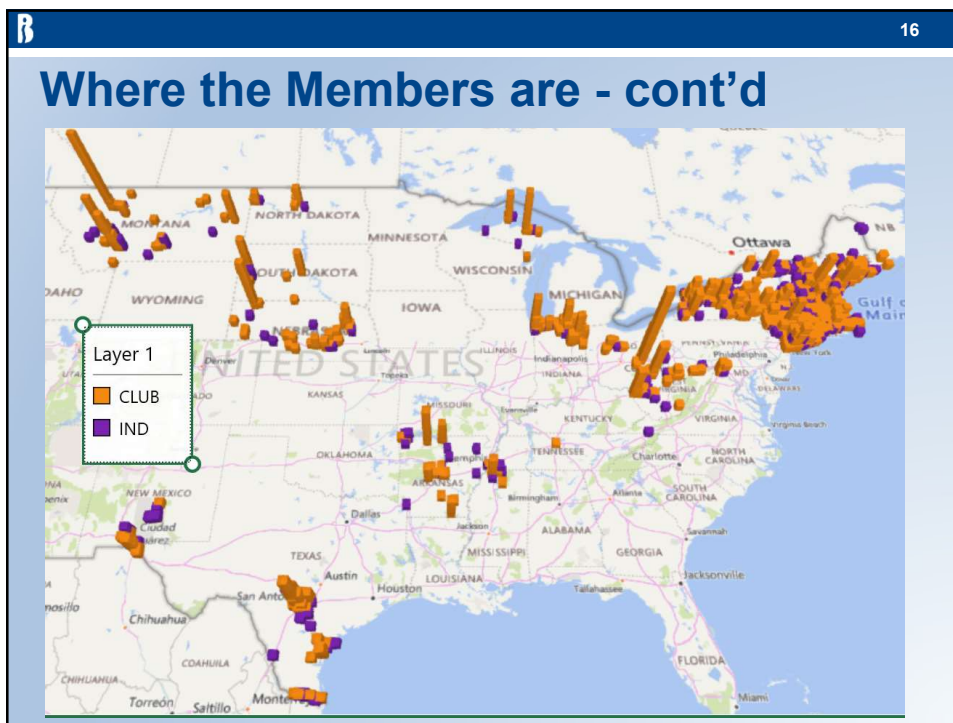
B 14

**ONLINE CHAPTER
MEMBERSHIP
OVERVIEW**

14



15



16

B 17

Where the Members are – cont'd

SOURCE REGION	ASSOC	CLUB	INDIV	SUB	GRAND TOTAL
CENTRAL	3	225	35	6	269
EAST	70	1,072	499	64	1,700
Overseas	6	78	63	3	150
SOUTH	11	116	37	6	170
WEST	4	248	56	10	316
Grand Total	94	1,739	690	89	2,605

17

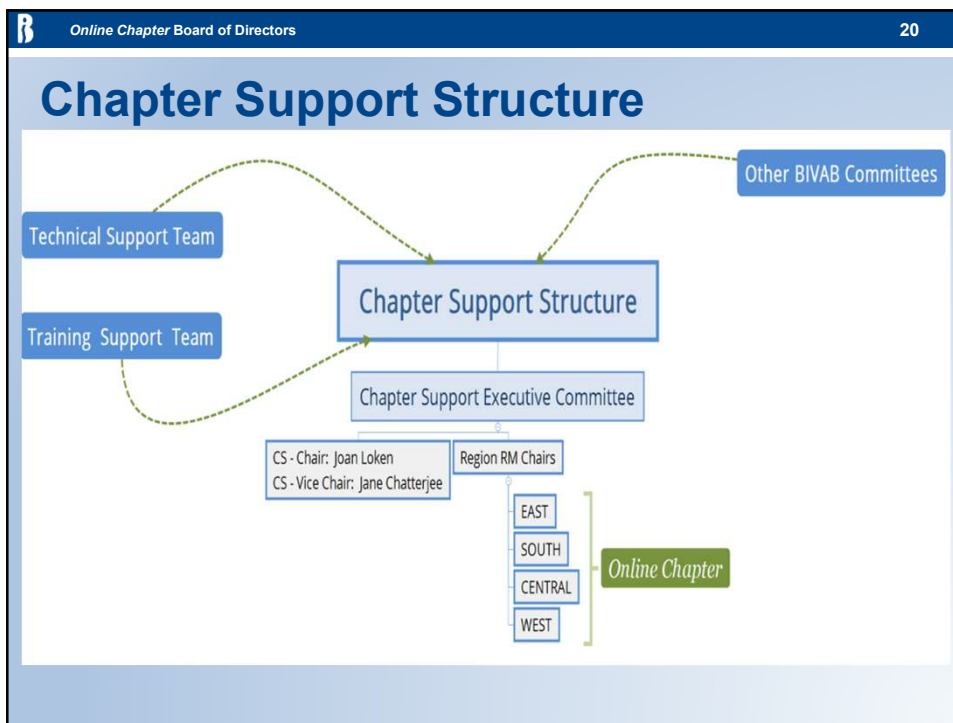


18

B 19

ONLINE CHAPTER ORGANIZATIONAL STRUCTURE

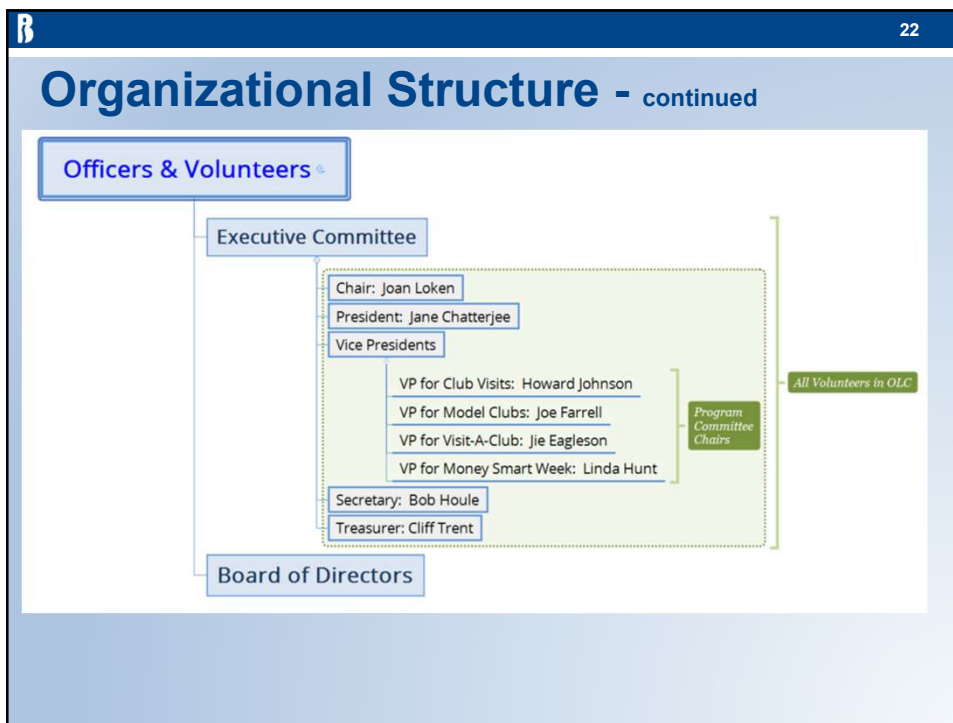
19



20



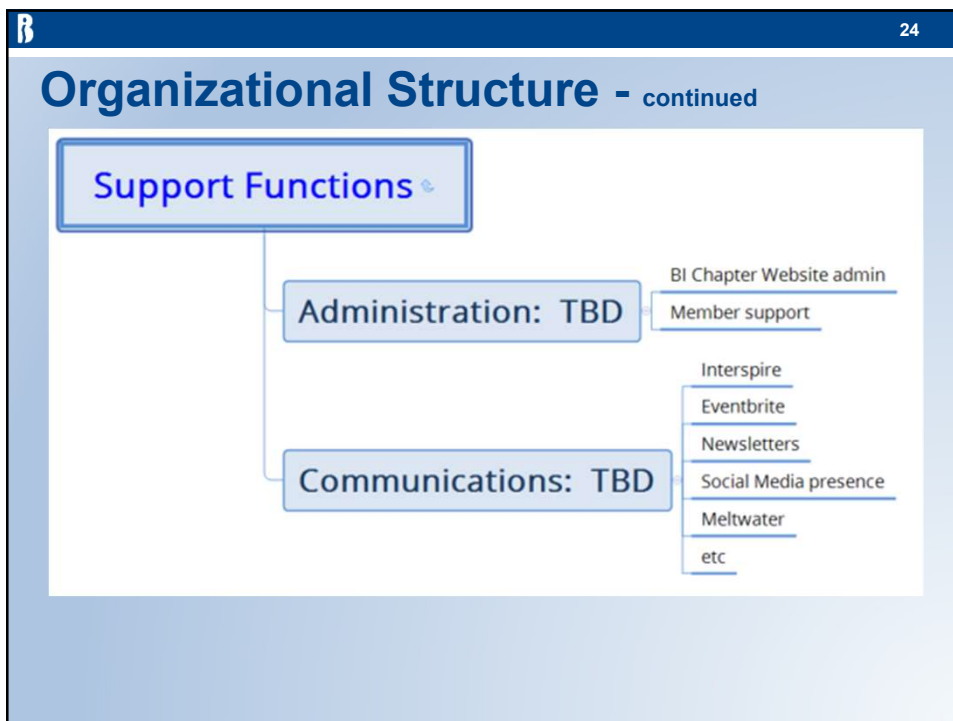
21



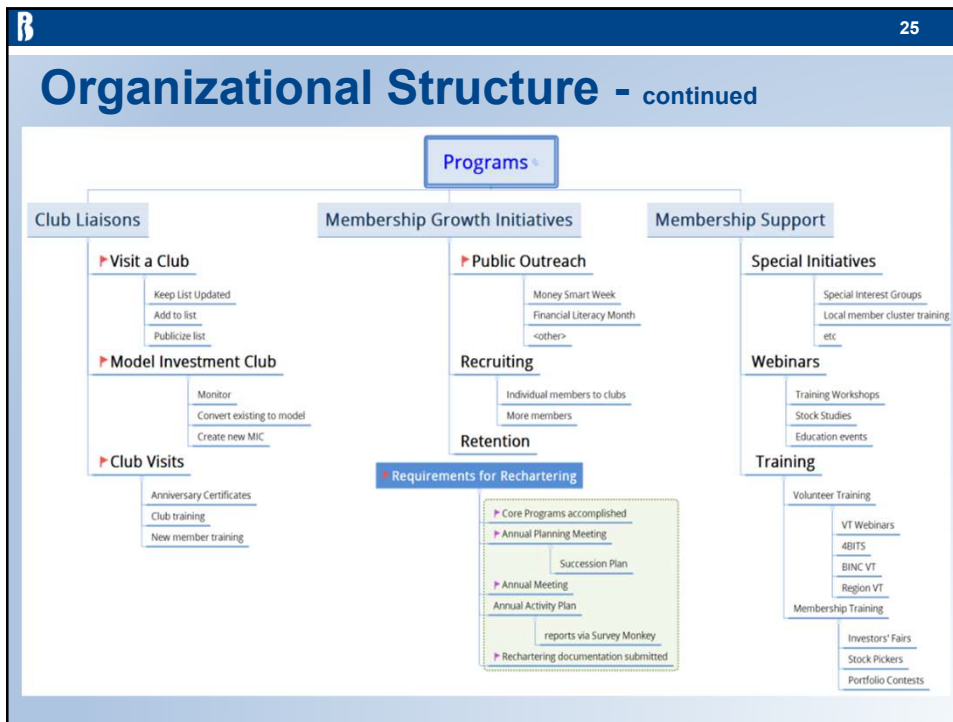
22



23



24



25



26



27



28



29



30

B 31

Where are we? – Timeline...Future

- 1st OLC Planning Meeting – Summer 2019
- By end BI FY 2018-19 – end start-up phase
- BI FY 2019-20 – transition to full BI Chapter status
- 2nd OLC Planning Meeting – Summer 2020
- 1st OLC Elections Meeting – Summer 2020
 - Elect OLC Board – for BI FY 2020-21
 - OLC begins to operate as a regular BI Chapter

31

B 32

OLC - Membership

Sources:

- BI Members not affiliated with any Chapter
- Members from small Chapters rolling into OLC
- New BI Members in OLC areas

Types:

- Clubs & Individual Members
- Satellites – Volunteer-led member clusters
 - prev. small chapters / continuing programs

32

B 33

Satellites – support by OLC

Support – how to work with OLC & what to expect...

Continue to support your membership & put on your local programs such as:

- Model clubs
- Outreach programs incl. MSW
- Club visits, Visit-a-Club program, BI certificates
- Webinars – GTW set up
- Education programs
- Etc

33

B 34

OLC - Volunteers

- From small chapters rolled into the OLC
- Active (or inactive)
- New Volunteers from OLC Membership
- Volunteer Skills & Interests Survey – inventory
 - Identify needed skills for OLC jobs
 - Core Programs / Mgmt. & Admin.
 - GTM / Teaching & Presentation / Tech
- Volunteer Development – Board

34

B 35

OLC - Board

- Assoc Directors – 1 year – voted at Bd Mtgs
- Voting Directors – 1-3 yr appoint. – at Election Mtg
- Director role - tied to OLC jobs – ‘working board’
- Officers – from Directors – after Election Mtg
- OLC President – 3 yr max.
- Treasurer - BI – Cliff Trent
- OLC Chair – Chapter Support Chair
- Board Development – Succession plan

35

B 36

OLC – Region & Chapters

- OLC itself is not part of any Region
- OLC – develop relationship with ‘local’ Regions
- Each Region - OLC RM – liaison, help, go-to
- OLC RMs – part of OLC ExCom
- OLC RMs – Officers & Function VPs for OLC – initial
- OLC Chair – Chapter Support Chair
- OLC Members – Chapter Guest Lists – sign up

36

B 37

Why is OLC a good fit for me?

- Benefits to Members**
 - Have a Home Chapter
 - Participate in OLC Programs
- Benefits to Volunteers**
 - Use skills volunteering for OLC
 - Involvement in running OLC
- Benefits to Former Small Chapters**
 - Become OLC Satellites & participate
 - Do 'fun stuff' without chapter admin. burden

37

B 38

What Do I Need to Do?

- Please submit your **Skills & Interest Survey** using the Survey Monkey link on the OLC web page
- We need your ideas & skills! We can train you on Webinar & other needed skills.
- EXCOM will be reaching out to you to follow up on your interests and how you can contribute.
- Email BIOnlineChapter@gmail.com when you want an event advertised. *OLC Communications* will post your event on the OLC web page, send Interspire messages to your target audience and help you make your event a success.
- After each event report it using Survey Monkey

38

B 39

Review of OLC's Webpage



Dennis Genord

39

B 40

Questions?

40