

2022

BNI®

BNI CHAPTER LEADERSHIP TEAM ROLE CORE COMPETENCIES CHECKLIST

WHAT IS THE EXPECTATION FOR EACH ROLE?
THE CHECKLISTS WILL HELP YOU MAKE
DECISIONS WHEN YOU ARE BUILDING THE
INCOMING TEAM



BNI Leadership Team Member Role Core Competencies Checklist

These competencies outline what to look for when you are making your selections to fill Leadership Team roles.

Note that the roles are listed in the order they are selected

1) VICE PRESIDENT – chosen by the **current Membership Committee and current Vice President**

Ability to:

- Maintain weekly reports using BNI Connect and Zoom
- Mark visitor and member attendance
- Prepare for 7 month check-ins
- Chair the Membership Committee
- Ensure the application process is running smoothly and timely
- Present the VP report as per the BNI Meeting Agenda
- Ensure that accountability letters for attendance and performance are consistently sent to members as needed
- Lead by Example
- Submit the PALMS Report after EACH meeting
- Run the second half of the monthly Chapter Success Meeting.
- Attend LT Roundtables
- Complete role specific training in BNI Business Builder and attend LT orientation prior to taking on role
- Work collaboratively with the Membership Committee to make decisions about venue/policy/ membership/ applications/BNI policy/set expectation within BNI guidelines
- Sign applicable LT Agreement(s) prior to taking on role

2) MEMBERSHIP COMMITTEE MEMBERS – chosen by the **incoming Vice President**
The Membership Committee and Vice President work **collaboratively** to: conduct interviews, onboarding of new members, make venue decisions and uphold BNI policies.

Ability to:

- Complete Member Success Program within the 12 months prior to taking on the role
- Completion of role specific training in BNI Business Builder and attend LT orientation prior to taking on role
- Lead by Example
- Signing of applicable Leadership Team Agreement(s) prior to taking on role
- Attend Monthly Chapter Success Meetings
- Watch and engage struggling members
- Ensure the chapter venue (Zoom is the online venue) is conducive to growth and professionalism
- Ensure that ALL members conduct themselves in a professional way in line with the BNI Policies and the Code of Ethics.

COMMUNITY BUILDER CHAIR

- Maintain the TOP 10 most wanted classifications list
- Schedule visitor events and communicates with the Chapter Consultant
- Lead By Example

MEMBER RELATIONS CHAIR

- Follow the structured conflict resolution process as defined in the training manual
- Deal with classification conflict within the chapter
- Communicate with the Chapter Consultant regarding all conflict

MEMBER ENGAGEMENT CHAIR

- Encourage member participation in the Power of One
- Review the Traffic Lights and PALMS reports to engage struggling members
- Communicate with the Mentor Coordinator to ensure the new members are engaged in the Passport Program

QUALITY ASSURANCE CHAIR

- Ensures the application process is timely
- New member onboarding is no longer than 2 weeks
- 7 Month check in renewal interviews are taking place consistently

3) PRESIDENT AND SECRETARY TREASURER– chosen by the incoming **Vice President and Membership Committee**

Ability to:

PRESIDENT

- Run the meeting according to the BNI Approved Agenda.
- Ensure that the meeting starts and stops on time.
- Run the first half of the monthly **Chapter Success Meeting**.
- Attend Monthly LT Roundtables
- Complete role specific training in BNI Business Builder and attend LT orientation prior to taking on role
- Lead by Example
- Sign applicable LT Agreement(s) prior to taking on role

SECRETARY TREASURER

- Attend the first half of the monthly Chapter Success Meeting
- Attend LT Roundtables
- Complete role specific training in BNI Business Builder and attend LT orientation prior to taking on role
- Announce upcoming renewals
- Maintain Monthly Budget reports
- Maintain Speaker Roster
- Announce 4-6 week Speaker Roster and enter roster and topics into BNI Connect
- Lead by Example
- Signing applicable LT Agreement(s) prior to taking on role

4) EDUCATION COORDINATOR, COMMUNICATIONS COORDINATOR, VISITOR HOST COORDINATOR – chosen by the **incoming President**

Ability to:

EDUCATION COORDINATOR

- Works with the chapter President and Vice President to come up with BNI related topics and themes
- Review and recommend: BNI Podcasts, Walker This Way Videos, BNI Business Builder courses for members to watch, listen and learn from
- Coordinate a 3-5 minute Education Moment each week.
- Complete role specific training in BNI Business Builder and attend LT orientation prior to taking on role
- Lead by Example
- Sign applicable Leadership Team Agreement(s) prior to taking on role

COMMUNICATIONS COORDINATOR

- Manage the chapter's BNI branded website, Facebook pages and all other social media collateral, ensuring branding standards are adhered to
- Announce BNI related upcoming courses/workshops/events at each meeting
- Read the weekly regional newsletters for content.
- Lead by Example
- Sign applicable Leadership Team Agreement(s) prior to taking on role

VISITOR HOST COORDINATOR

- Build a strong Visitor Host Team
- Follow up with visitors by a phone call within 24 hours of meeting
- Arrive early along with the Visitor Host team for every meeting
- Ensures the Visitor registration table is set up prior to the start of each meeting.
For BNI online, ensure that the networking breakout rooms are pre-set up and that visitors are being engaged in those rooms.
- Make sure Visitors are registered in BNI Connect
- Review application process with Visitors during Visitor Orientation
- Completion of role specific training in BNI Business Builder and attend In person LT orientation prior to taking on role
- Lead by Example
- Signing of applicable Leadership Team Agreement(s) prior to taking on role

5) MENTOR COORDINATOR – chosen by the **incoming Vice President and Membership Committee**

Ability to:

- Ensure that each new member is enrolled and engaged in the BNI Passport Program
- Assigns 10 Member Mentor roles and ensures that each Member Mentor is reaching out to the new member in a timely manner (not the other way around)
- Consistently communicates with the chapter BNI Member Consultant
- Communicates with the chapter President and MC regarding new members being inducted
- Attends the first half of the monthly Chapter Success Meeting
- Completion of role specific training in BNI Business Builder and attend LT orientation prior to taking on role
- Lead by Example
- Signing of applicable Leadership Team Agreement(s) prior to taking on role