

October 27, 2014

**Executive Summary:** Serving as a SCORE volunteer is a privilege with the great benefit of being able to contribute to the mission to “Foster vibrant small business communities through mentoring and education.” In our 50 year history SCORE has assisted over ten million clients. We currently deliver approximately a half million services each year.

There are three fundamental criteria to for applicants to consider:

1. Do you have some business experience that is of value if you share it?
2. Are you willing to share that business experience with clients through mentoring and education?
3. Are you willing to work within the guidelines of the SCORE Code of Ethics?

Buffalo Niagara SCORE volunteers share their experience with over 3,000 services to entrepreneurs and small businesses every year through face-to-face and online mentoring and workshops.

Because of the importance of the work we contribute to society there is a training program that is followed from interview through to training with SCORE Certified Mentors.

### **Provisional to Active SCORE Member on-boarding process:**

1. Interview and/or attend monthly meeting
2. On-line application
3. Submit “Code of Ethics” Form
4. Access to the SCORE website for training
5. Complete 2 on-line courses (Orientation & SCORE Mentoring Methodology)
6. Meet for local Orientation appointment
7. Attend a Workshop
8. Do 5-6 Co-counselling’s with a SCORE Certified Mentor

### **New Volunteer Details**

SCORE Chapter 45, Buffalo Niagara

Welcome! Your experience matters. We very much appreciate your willingness to join SCORE in our mission to grow successful small businesses across America, one business at a time. By sharing your experience you can help individuals and families to achieve and sustain the American Dream.

This stage of the application process is designed to help you to become an even better resource and to insure that our clients receive the best business counselling and mentoring possible.

The following is a brief overview of the training process for making your way from "provisional" to full membership.

## A. The Provisional Process

1. Early in the process you will be assigned a “coach” who will be your “go-to” SCORE member for questions or concerns. You and your coach should keep in touch to see how you're doing. Once you apply to volunteer, either on-line or via hard copy, you will receive an email with the needed information to access the volunteer center to start the process to become a provisional member. Each new provisional member is required to complete the on-line orientation and the SCORE/Deluxe Mentoring Methodology certification. Both of these courses are found at <http://www.training.score.org/> under education/training. Please print the certificate of completion for both courses and deliver to any one of the Membership Committee or your coach. Once your application has been processed locally and entered into the system, you will receive a welcome letter and SCORE pin from our national office in Herndon, VA. Make sure to be on the lookout for SCORE emails that may end up in your junk mail. You will want to white list those addresses.

### 2. Orientation (in person, local)

The next step is orientation with a senior SCORE Certified Mentor.

### 3. Code of Ethics and Conduct (on-line or in person)

If you have not already done so, while in the SCORE online Volunteer Center, in the green box, please click "Get Forms", print out the Code of Ethics and Conduct, (second listing under “Other SCORE Forms”) sign and date it, and bring it to any one of the Membership Committee or your coach.

### 4. Monthly Meetings

Always the second Tuesday, December excepted. 10-1. Lunch reservations needed (handled by email). Locations rotate, ask for that month's location. Your current status as "provisional" in the on-line directory (CORE), will ensure you get email notice prior to each lunch (as well as any other Chapter-wide notice). Lunch contribution after being our guest is \$10 if you choose to stay for the meal.

### 5. Attend a Workshop

The monthly all-day workshop runs from about 8 a.m. to 4 pm. You can take morning/afternoon sessions separately. Find the dates and locations on our website. The purpose of this is to provide you with the small business fundamentals that most of our clients need to know.

[www.buffaloniagara.score.org/localworkshops](http://www.buffaloniagara.score.org/localworkshops)

### 6. Co-Counselings

For non-counseling Volunteers, the requirement is to observe one counseling session. For future counseling volunteers, to observe/participate in 5-6 sessions.

You may counsel with any counselor as long as (s)he is on the Active (as opposed to Provisional) roster. Inquire on line through SCOREcast (see below) to find out when clients are scheduled. Then arrange to show up at the same time as the client. Note that sometimes clients don't show up when they say they will. At the SBA office in Buffalo, clients are scheduled for 10, 11 and 12 noon.

Please ask your co-counsellor to fill out and submit a Mentor's Report Form on your session(s). Again, these go to any member of the Membership Committee or your coach.

### **Notes:**

[www.BuffaloNiagara.score.org](http://www.BuffaloNiagara.score.org) 716-551-4301 (phone at the SBA office)  
Chapter voicemail 716-253-1130 Email [buffaloniagara45@gmail.com](mailto:buffaloniagara45@gmail.com)

**Client data** – all volunteers are required to become familiar with SCORE's client data entry system called CORE. CORE may be accessed from the website Volunteer Center. The Volunteer Center is accessed by logging in on [www.buffaloniagara.score.org](http://www.buffaloniagara.score.org) website with the user name and password that are provided. the Data entry is not difficult *but is essential to both the Chapter's receipt of National funds, and the ability of a second, third or Specialist counselor to pick up a knowledge-full file rather than start in the dark.* You'll learn this at local orientation. Entry time is typically less than 8 minutes, immediately after counseling with the client.

The Chapter uses SCOREcast, an on-line facility for scheduling both counselors and clients.

**Name badges** – On completion of provisional status, you'll get a badge, and if you mostly counsel in Buffalo at the SBA you are eligible for an SBA photo-ID back door badge.

**Business cards** – There are blank cards in the SBA. When you've completed provisional status, we'll print you a your-name-only set of cards.

**Time Frames** - 90 days is the normal time for completion of provisional status. When you have met all provisional requirements, notify one of us; we'll take a formal Executive Committee vote, and upon approval change your status to full membership ("active") which will be recognized at a monthly meeting. Good luck and best wishes. Call our chapter voicemail at 716-253-1130 or email us [buffaloniagara45@gmail.com](mailto:buffaloniagara45@gmail.com) if you have questions.

### **B. After Provisional: "Active" Membership Requirements**

1. NSO requirements. Have and use email because all NSO and Chapter communications are by e-mail; annually re-accept Code of Ethics and Conduct. Each member must have and read email regularly in order to be informed of Chapter meetings, schedules, events, and other information.

2. Local requirements – everyone. Accept one administrative responsibility (first year by Chapter need, second and subsequent years by individual choice). Choices include, for example, serving on a Chapter Committee, being a speaker, giving a workshop presentation, distributing Chapter brochures and other advertising, or helping with Chapter/NSO administration.

3. Local requirements – counselling and contributing. Due to the fact that volunteer availability varies, we do not mandate a specific time commitment from our volunteers. We do, however as a service organization, expect all volunteers to be actively contributing materially to the work of the chapter. This work is primarily mentoring and training. Here is a list of some of the ways in which volunteers contribute (invariably in more than one way):

- Serve on a specific administrative capacity in support of chapter operations (e.g. assistant Administrator, Secretary, Treasurer, etc.) scheduling, organizing, etc.
- Regularly mentor clients face-to-face – as evidenced by completed 641 reports
- Regularly mentor clients as an active member of the Email Mentoring program
- Serve on the Membership Committee and actively perform tasks assigned by it\*
- Serve on the Marketing Committee and actively perform tasks assigned by it\*
- Serve on the Workshop Committee and actively perform tasks assigned by it\*

- Serve as workshop faculty
- Assist in our workshops as a mentor, registrar, administrator or other role
- Serve on other committees and working groups as requested by the EC
- Serve as a chapter recruiter, ambassador or advisor in a specific target market or specialty as requested by the Executive Committee (EC)
- Act as a greeter and host for guests at our chapter meetings & events
- Act as a coach to assist probationary members to become full members
- Serve on the Speakers Bureau
- Participate in programs such as Straight Talk, Matchmaker, Simple Steps & others
- Chapter meeting coordinator (book locations & manage attendance and meals)
- Community relationship development – build relationships with other organizations
- Continuing education for volunteers
- Lead and/or participate in chapter fund-raising
- Other: (fill in the blank)

4. Monthly Business Meetings. The Chapter does not attendance at monthly business meetings. That being said, the meetings are a source of local business information, continuing education, and camaraderie for the attendees. It's a good opportunity to learn about your co-mentors' skills, enabling you to tap their expertise for your clients. Your ideal target, when possible, would be at least 6 of 12 meetings. Meetings are always the second Tuesday of the month, 10-noon, with optional lunch.

### C. Other Information

SBA: We have a legacy of collaboration and cooperation with the SBA Buffalo District office in support of our small business community. You may hear about the following SBA-Chapter activities, at which your participation is encouraged.

Straight Talk – This occurs annually on the Saturday following Martin Luther King's birthday celebration. Running from 7:00 a.m. until mid-afternoon, it attracts usually 250-350 participants and many local business organizations.

Following Straight Talk, there are 8 Tuesday evening seminars in February and March (6-9 p.m.), covering a variety of business topics. We attend all functions, and speak at some. The cost of Straight Talk and the eight seminars is nominal, making it a landmark value for new entrepreneurs.

EXPO-Matchmaker – This occurs in mid-May and includes Small Business Week recognitions, lunch, and a morning of 10-minute business matchmaking intervals with prime government contractors and local large-scale employers.

Other Workshops and Seminars Buffalo Niagara SCORE conducts an average of over 40 workshops and seminars each year. These are targeted for entrepreneurs who are just starting businesses and existing businesses. We have many opportunities for volunteers to engage in this important educational outreach program.

**SCORE Mission:** Foster vibrant small business communities through mentoring and education.

**Our Vision:** Every person has the support necessary to thrive as a small business owner.

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