



Chapter Operations Manual

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Table of Contents

BNi Overview..... 5

 How to Use this Chapter Operations Manual..... 5

 History of the Organization 5

 BNi Philosophy & Principles 5

 Philosophy 5

 Mission Statement 5

 Vision..... 5

 BNi Core Values 6

 BNi Code of Ethics 6

 General Policies 7

 Administrative Policies 7

 Non-Discrimination Policy 8

 No Harassment Policy 8

 Program Guidelines 8

 Branding Compliance 9

 GDPR COMPLIANCE..... 10

BNi Weekly Chapter Meeting Agenda..... 11

 BNi In-Person Meeting Agenda Outline..... 11

 BNi In-Person Meeting Agenda Detail..... 12

 BNi Online® Meeting Agenda Outline..... 21

 BNi Online® Meeting Agenda Detail 21

 Large Chapter Agenda Adjustments..... 27

Chapter Processes 28

 Growth 28

 Member Development..... 29

 Retention of Members 30

Monthly Chapter Success Meeting..... 31

 Agenda and Instructions..... 31

 Attendees 31

 Preparation for the Meeting 31

 Agenda 31

Chapter Organizational Chart 34

President	35
President Checklist of Responsibilities	35
Chapter Supplies.....	36
Weekly Follow-Up & Reminder Email Communication	36
In-Person Chapter Meeting Venue	37
Meeting Themes	37
Annual Theme Calendar (Sample).....	38
Vice President	39
Vice President Checklist of Responsibilities	39
Taking Attendance	40
Membership Committee.....	41
Membership Committee Specialists	41
Membership Committee Report*	41
Weekly Membership Committee Check-Ins.....	41
Quality Assurance Specialist.....	42
Checklist of Responsibilities	42
New Membership Application Review Process	42
Reasons to Decline an Application	51
Transferring Members	51
Member Engagement Specialist.....	52
Checklist of Responsibilities	52
The Seven-Month Check-In	52
Perform Coaching Moments	53
Community Building Specialist	54
Checklist of Responsibilities	54
Identify & Communicate the Top Ten BNI Classifications	54
Implementing the Attendance Policy.....	55
Certificate of Credit.....	56
Leave of Absence	56
Member Relations Specialist.....	57
Checklist of Responsibilities	57
BNI Classification Concerns	57
Evaluating Member Complaints	58
Dispute Resolution Options	59
Accountability Letters	61

Secretary/Treasurer	62
Secretary/Treasurer Checklist of Responsibilities.....	62
Monthly Membership Dues Report	63
Speaker Rotation Schedule.....	63
Bank Accounts for Non-BNI–Related Activities.....	64
Opening Non-BNI–related Activities Bank Accounts (USA).....	65
Open a Non-Interest-Bearing Checking Account.....	66
Visitor Hosts	68
Visitor Host Team Checklist of Responsibilities	68
The BNI Connect Visitor Portal.....	69
Definitions	69
Visitor	69
Guest.....	70
Substitute	70
Visiting BNI Members (not Substituting).....	70
Visitor Orientation.....	70
Visitor Host—Follow-Up Specialist	73
Education Coordinator	74
Education Coordinator Checklist of Responsibilities	74
The Process	75
Mentor Coordinator.....	77
Mentor Coordinator Checklist of Responsibilities.....	77
Building the Mentoring Team.....	78
Attributes of Good Member Mentors	78
Member Mentor Worksheet	78
Training Member Mentors.....	79
BNI Passport Instructions.....	79
Mentor Coordinator and New Member’s First Meeting	79
Assign the Names of the Member Mentors	79
Instructions for Using the Passport	79
Check-In and Follow-Up	80
Appendix.....	81
Renewal Process	81

BNI Overview

How to Use this Chapter Operations Manual

Welcome to the updated version of the BNI Chapter Operations Manual. This Leadership Team Manual is designed to provide best practices and guidelines to BNI Leadership Teams for how to operate a BNI chapter. Leadership Team is defined as President, Vice President, Secretary Treasurer, Membership Committee, Visitor Host, Education Coordinator, and Mentor Coordinator. Of course, this Leadership Team Manual cannot address every situation that might arise within a BNI Chapter, so Leadership Teams should use their professional judgment in deciding how to proceed in any given situation. All your Leadership Team Support material in one location! This PDF is searchable; you can also click on links in the Table of Contents as well as throughout the document to quickly take you to respective sections.

History of the Organization

Dr. Ivan Misner was a management consultant when he started the organization in 1985. He worked with companies that needed assistance in strategic planning and organizational development. As a business consultant, he received most of his business through referrals. However, he was not satisfied with the types of business groups that existed and he put together a networking group that was structured and focused on doing business and had an emphasis on positive reinforcement and support. That organization became BNI[®].

To learn the entire history of BNI globally and in the USA, you can find an electronic copy of *Givers Gain[®]: The BNI[®] Story* on BNI Business Builder under BNI BB Training > Presentations.



BNI Philosophy & Principles

Philosophy

Success in BNI means being a positive and supportive Member of an organization based upon mutual support. This requires commitment to your fellow Members as well as to the philosophy of Givers Gain[®]. By giving business to others, you will get business in return.

Mission Statement

The mission of BNI is to help BNI Members increase their business through a structured, positive and professional referral marketing program that enables them to develop long-term, meaningful relationships with quality business professionals.

Vision

BNI's Vision statement is Changing the Way the World Does Business[®]

BNI Core Values

1. Givers Gain®

Be willing to give first, before you expect to gain. Giving unconditionally creates a better world for everyone and creates important opportunities and lasting relationships.

2. Building Relationships

Building strong relationships creates an environment of trust and support that yields happiness, opportunity and meaning.

3. Lifelong Learning

Your value grows as you develop your knowledge and skills. Create a curriculum based on the person you want to become and follow that curriculum to get yourself there.

4. Traditions + Innovation

We honor our traditions and look to a brighter future fuelled by innovation, optimism, and excitement.

5. Positive Attitude

We find the good in everything that happens to us and that propels our lives forward. Finding the good in every person enables us to attract terrific people, opportunities, and wealth.

6. Accountability

We keep the promises we make, especially when it is hard to do so. This creates trust and supports strong relationships.

7. Recognition

We appreciate that recognition fuels the growth of successful organizations. The person who masters the art of recognition attracts success, meaning, and happiness.

BNI Code of Ethics

When evaluating Members, please apply the following BNI Code of Ethics to the various situations. This is not meant to be a list of specifics but can be applied in principle to almost any conflict or complaint.

Upon acceptance to BNI, I agree to abide by the following BNI Code of Ethics during the service of my participation in the organization:

1. I will provide the quality of services at the price I have quoted.
2. I will be truthful with the Members and their referrals.
3. I will build goodwill and trust among Members and their referrals.
4. I will take responsibility for following up on the referrals I receive.
5. I will display a positive and supportive attitude.
6. I will live up to the ethical standards of my profession. *

*Professional standards outlined in a formal code of conduct for any profession supersede the above standards.

General Policies

Membership Committees of each Chapter have final authority related to BNI Policies. Membership Committees may put a BNI Member on probation or open a Member's classification for failure to comply with the Member Policies, the Code of Ethics or BNI Core Values.

1. Only one person from each BNI classification can join a chapter of BNI. Each Member can only hold one BNI classification in a BNI Chapter.
2. BNI Members must represent their primary professional focus.
3. BNI Members must arrive on time and stay for the entire published meeting time.
4. An individual can only be a Member of one BNI Chapter. A Member cannot be in any other program that holds Members accountable to pass referrals.
5. A BNI Member is allowed three absences within a continuous six-month period. If a Member cannot attend, they may send a substitute; this will not count as an absence.
6. Members are expected to be engaged in the BNI Chapter by bringing qualified referrals and/or visitors.
7. Visitors may attend BNI Chapter meetings up to two times.
8. Only BNI Members who have completed the Member Success Program, and BNI Directors/Director Consultants can do Feature Presentations during the BNI Meetings.
9. Leaves of absence are possible for certain extenuating circumstances (e.g., extended medical issue that prevents member from working) at the discretion of the Membership Committee.
10. Members who wish to change their BNI classification must submit a new membership application for approval.
11. All BNI membership lists are for the purpose of giving referrals only. Before sending any marketing or business solicitation communications to BNI Members outside your Chapter or Director/Director Consultants, the recipient must give their consent. Consent must be freely given, specific, informed and unambiguous.

Policies are subject to change. All proposed policy changes need to be reviewed first by the International Board of Advisors.

Administrative Policies

1. There is an initial application fee. Participation fees are paid annually or biennially. Some regions may offer a 5-year Membership as well. Contact the local Secretary/Treasurer for amounts and payment instructions.
2. BNI may establish Chapters in every city or community with people interested in developing a referral-based business. In addition, BNI reserves the right to open more than one Chapter per community or city where demand of BNI's services are requested.
3. Membership fees are payable 30 days prior to the due date. Members not paid by the first day of the month they are due, are considered late and will be assessed a late charge. If fees are not paid within 15 days, the Member will be officially dropped by BNI.



4. Fees are non-refundable. A Certificate of Credit will be given, upon request, to Members in good standing for the unused portion of their time. This certificate of credit will be valid for a duration of 2 years from the issue date.
5. Fees cannot be transferred from one person to another unless the fees are from the same company.
6. BNi has a strict policy on returned checks. A Member has three working days in which to contact their Regional BNi office and resolve the matter. Any returned checks not resolved within this period will be turned over to collections. All returned checks will be assessed a minimum \$25 returned check fee. If a Member passes a second NSF check, that Member will be subject to immediate termination.
7. BNi is a marketing service provided by BNi Global, LLC. BNi or any of its franchisees reserve the right to discontinue a Member's participation in this program.
8. A Member requesting a transfer from their current Chapter to a new Chapter will be required to submit a completed new Member application to the Membership Committee of the new Chapter. In addition, if the Member has less than 6 months of paid membership credit, they must submit a renewal payment. Or, if the Member has more than 6 months of paid membership credit, no additional investment is required. Upon acceptance into the new Chapter, the credit from their previous Chapter will be added to their membership in the new Chapter as well as the renewal time, if applicable.

Non-Discrimination Policy

BNi Global requires that Chapters review and select persons for membership in all classifications based on qualifications without regard to actual or perceived race (including hair texture and natural hair styles), color, gender, gender identity or expression, religion, religious creed (including religious dress and religious grooming), national origin, ancestry, citizenship, marital status, domestic partner status, sexual orientation, age or physical or mental disability, legally protected medical condition or information as defined by local or state law, status as a victim of domestic violence, sexual assault or stalking, enrollment in a public assistance program, or any other classification protected by applicable law (referred to as "protected characteristics"). BNi will support no Chapter's action when in violation of this non-discrimination statement.

No Harassment Policy

BNi does not tolerate harassment of our Franchisees, regional teams, leadership teams or Members at the hand of another. Any form of harassment on the basis of race, creed, color, age, sex, sexual orientation, gender identity, national origin, ancestry, citizenship status, religion, marital status, disability, military service or veteran status, genetic information or any other classification protected by applicable federal, state, or local laws and ordinances is prohibited and will be treated as a disciplinary matter. BNi is committed to freedom from harassment within our network.

In addition, as BNi is a global organization with a diverse Membership. It is the responsibility of all Members, Directors, Franchisees, regional teams, and leadership teams to promote mindfulness of and sensitivity to cultural differences. Doing so ensures BNi is best able to serve its Members by creating a welcoming environment.

Program Guidelines

Program Guidelines are not policies but recommended practices that allow Chapters to run more smoothly and effectively.

Visiting Chapters

- Before visiting another Chapter, the visiting Member should call that Chapter's President first.
- Members visiting other Chapters should announce that they are from another Chapter.
- Visiting Members must not do or say anything that competes with a Member of that Chapter.
- The Chapter should be cautious in giving referrals to individuals they don't know, including visiting Members.
- Visiting Members should pay for their own meal (if applicable).
- Visiting Members follow the same visiting policies as non-members; no more than two visits are allowed.

Absences and Tardiness

- Absences and tardiness mean less business for Members; therefore, the Membership Committee may give warnings to Members who are consistently late or leave early. If the problem continues, the Member's classification may be subject to being re-opened.

Substitute Program

- Potential substitutes include customers, friends, family, BNI Members from other Chapters and/or employees.
- The primary purpose for a substitute is to represent a BNI Member. BNI recommends minimal use of a substitute.
- Members should alert the Chapter of a substitute so that the Visitor Host can be there to greet him/her.

Business Representation

- Members agree to only represent the professional classification approved by the Membership Committee.
- Members of BNI who represent multi-level marketing organizations should represent their products and services in BNI and not the business opportunity element of their business.

Branding Compliance

Complying with all branding requirements is important for Leadership Teams in BNI to properly market and build relationships. When branding requirements are not properly followed, it can hurt our brand, it could result in serious consequences including legal repercussions.

Leadership Teams must comply with all current branding requirements for all Chapter PowerPoint presentations, printed and digital materials, tablecloths, signage, promotional items, and social media pages.

Some Leadership Teams have tried to circumvent complying with our branding requirements by leaving off "BNI" or our logo. This is not appropriate and hinders our ability to build a strong, professional brand. BNI needs to be appropriately used on all materials related to the chapter, marketing the chapter, or marketing individuals engaged in activity related to BNI.

Executive Directors are responsible for enforcing branding compliance. Before you produce anything for BNI, seek written approval.

Leadership Teams will have 3 months to update branded items after any official changes are made to the BNI brand. For more information about branding, refer to the [Brand Standards Manual](#).

GDPR COMPLIANCE

General Data Protection Regulation (GDPR) provides the world's toughest data and privacy protection laws. It imposes requirements on organizations that collect data or target people in the European Union (EU). As an international organization, GDPR impacts BNI Members, Leadership Teams, Directors, and Global Support Team regardless of if you are in the EU or not.

GDPR Date, Retention and Erasure Requirements

All Member facing forms need to have a GDPR Disclaimer with the appropriate "lifespan" (see below). Here is an example:

"To protect personal data under GDPR & Privacy Shield, this form must be destroyed within 3 working days after reasonable lifespan."

Form	Sample Lifespan
Leadership Team Meeting Report	1 working day
Membership Committee Meeting Report	1 working day
Application Review Checklist	2 weeks
Business Reference Verification	1 week
Member Compliant Paperwork	Varies*
Applicant Interview Notes	1 working day
Visitor Sign-in Sheet	1 working day
Seven Month Review	3-4 weeks
Slips (Referral, One-to-One, TYFCB, CEU)	1 working day
Printed Reports (Chapter Traffic Lights, Member Traffic Lights, PALMS Reports, etc.)	1 working day

*Check with your director for guidance. Note: Any other forms that have identifiable information (e.g., Member names, Member Positions and dates, etc.) destroy 1 working day

BNI Weekly Chapter Meeting Agenda

Wasting time in unproductive meetings has become a common joke in business. To avoid wasting your time, every BNI Chapter meeting has been run by an agenda since we were founded in 1985. Each item on the agenda was an innovation that generates more referrals for members.

The BNI Meeting Agenda is the core element that makes the BNI system work for each Member. With the best of intentions, there have been chapters who have altered the agenda for their chapter. They felt their innovation was better. When comparing the number of referrals passed in the least amount of time, no agenda has proven more effective than the BNI Weekly Meeting Agenda. Only BNI Chapter Members get to use this agenda. It has been refined through millions of meetings to maximize effectiveness. Use the agenda in an energizing way, to engage the members and wow the visitors and you will generate more referrals for your chapter.

BNI In-Person Chapters use the In-Person Meeting Agenda below.

BNI Online[®] Chapters use the BNI Online Chapter Meeting Agenda [here](#).

BNI Hybrid Chapters will use both.

BNI In-Person Meeting Agenda Outline

1. Open Networking
2. Welcome Visitors and Introduce Leadership Team
3. Core Value of the Week
4. Purpose and Overview of BNI[®]
5. Networking Education
6. Announce BNI[®] Network Leaders
7. Welcome New and/or Renewing Members to the Organization
8. Members Introduce Themselves and Give their Weekly Presentation
9. Welcome Visitors to BNI[®] and Have Members Introduce Them
10. Vice President's Report
11. Membership Committee Report
12. Secretary/Treasurer Announces Speaker Rotation
13. Speaker(s) Give 5-12 Minute Feature Presentation(s), Including Questions and Answers
14. Referrals and Testimonials
15. Referral Reality Check
16. Visitor Recognition
17. Secretary/Treasurer's Report
18. BNI[®] Announcements, Reminders and Special Reports
19. (Optional) Door Prize Drawing(s), for Members Bringing Visitors or Referrals
20. Close Meeting

BNI In-Person Meeting Agenda Detail

The Leadership Team and Visitor Hosts★ arrive a minimum of 15 minutes prior to the designated meeting time to welcome visitors. **Note:** The Chapter Leaders will make or break the quality of most meetings! Be positive, professional, and enthusiastic.

0:00 1. ★ Open Networking

Goal:

- This portion of the meeting is an open time for Members to build stronger relationships with each other and to meet visitors.
- Ideally Members use this time to foster stronger relationships, set up One-to-Ones, follow up on referrals, and engage visitors.
- Use this time to foster stronger relationships with Members you know and initiate relationships with Members you haven't connected with. Plus, make a point of meeting visitors and welcome them to your Chapter.

President Script: "Welcome to the BNI _____ Chapter! Members, please take a moment to greet our Visitors this morning, exchange business cards and set up One-to-Ones. We will begin the formal part of the BNI Meeting after Open Networking."

0:15 2. Welcome Visitors & Introduce Leadership Team

Goal:

- The President welcomes everyone to the Chapter meeting, invites them to take their seats.
- The President then welcomes visitors and introduces Chapter leadership.

President Script: "Please take your seat for the next part of the meeting. Take a moment to silence your electronic devices. At this time, will the Leadership Team and Support Leadership Team Members please stand and state your name and position."

I'd also like to welcome our Visitors and Substitutes. Visitors, please stand and state your name, business name and who invited you here today. Substitutes, please stand state your name, business name and who you are substituting for today."

After Visitor Introductions, "We are glad for each of our visitors today. We are interviewing good businesspeople that we can give all our referrals to. Your goal today is to experience a meeting, see that we are focused on helping each other grow. At the end of our meeting today [Visitor Host's name] will meet with you briefly to discuss with you the meeting the best way to move forward from there. Sound good?"

"I'd also like to introduce our visiting Director/Director Consultant and Ambassadors today.

President Note: Observers, including those from newly forming Chapters, should designate one representative to speak on behalf of all observers.

Key Points:

- Allows extra visibility for Members who hold leadership positions
- Educates Visitors on Chapter roles and responsibilities
- Reminds Members who they can go to for assistance in a specific area
- Shows structure, support, and Member involvement

0:16 3. Focus Core Value of the Week and What it Means to Them**Goal:**

- Remind our Members of the core principles that bind us together.
- Engage our Members by asking a different Member IN ADVANCE each week to highlight one of our Core Values.

President Optional Script: “Each week, we are reminded that the essence of what binds us together as a community is our Core Values. Today I would like to call on [Member name] to share a Core Value moment.”

0:17 4. Purpose and Overview of BNI**Goal:**

- The President recognizes a Member to tell share the impact BNI has had on their business.
- Consider if there’s someone you know who would appreciate hearing this story to encourage them to visit your BNI Chapter.

Alternative Script: “Additionally, BNI is the most successful organization of its type in the world. Currently, there are over _____ Chapters and more than _____ Members worldwide. In the last 12 months, BNI Members passed over _____ referrals and this translates into over _____ in business being passed between Members. The BNI philosophy is Givers Gain®: If I give business to the Members of my Chapter, in return they will want to give business to me.”

Key Points:

- To get the most updated statistics, [click here](#).
- Gives Visitors an opportunity to hear Members’ positive testimonials about how BNI is effective

0:18 5. Networking Education

The Education Coordinator (or a Member assigned in advance by the Education Coordinator) delivers a 3- to 5-minute presentation on networking.

Goal:

- In the spirit of our Core Value of Lifelong Learning, an Education Moment is presented to help our Members enhance their networking skills.

Key Points:

- Can be used to highlight those who have excelled in Member participation (for example, inviting Visitors or passing referrals) by having them share their techniques.
- Can be used as an opportunity to positively address a general Membership Committee topic that would help Members to be even better networkers.

0:21 6. ★ Recognition**Goal:**

- During the first meeting of the month the Vice President recognizes Members who made significant efforts in the previous month.
- Make a note to congratulate Members on their achievements to become Master Connectors themselves.
- Study what successful Members do that make them so effective. Then make plans to go beat them next month.

The example below is for the monthly recognition of high performing Members through the awarding of Notable Networker Certificates. If there is more opportunity for recognition outside of the Notable Networkers, this time can be used.

Vice President Script: “For the previous month, we’d like to acknowledge our top-performing Members for ...

- Most Chapter Education Units completed
- Most Visitors brought
- Most One-to-Ones conducted
- Most Referrals given
- Most Thank You for Closed Business generated

We encourage you to schedule a One-to-One with these Notable Networkers.”

Vice President Note:

- Consider framing the Notable Networker Certificates, in advance.
- Have recipients come to the front of the room to be recognized.

Key Points:

- Gives praise and appreciation to the Members
- Encourages Members to continually participate in the BNI program
- Creates an opportunity for additional visibility via social media
- Encourages Members to find additional referrals to thank the Notable Networkers

0:24 7. ★ Welcome New and/or Renewing Members to the Chapter**Goal:**

- A fun celebration of new Members and anniversaries.
- New and/or renewing Members (who have been approved by the Membership Committee) come to the front of the room for a formal induction into the Chapter.
- Chapter Members stand and recite the BNI Code of Ethics with the new Member.
- The existing Members agree to support the new Member as they become a contributing part of the team.
- Aim for making an impact and having fun!
- Welcome new and renewing Members warmly into the Chapter with a round of applause.

President Script: “I’d like to welcome our new and renewing Members to the BNI _____ Chapter. Please come to the front of the room so we may formally induct you. Members please stand for the BNI Code of Ethics. New Members:

Please share why you applied for membership in our BNI Chapter. Renewing Members: Please share why you chose to renew your membership in our BNI Chapter. New Members, please stay after the meeting today for a New Member Orientation.”

Key Points:

- Celebrates Chapter growth
- Reconfirms commitment to the BNI Code of Ethics
- Demonstrates a warm welcome to the Chapter
- Asking Members and Visitors why they chose to (re)apply provides positive feedback for the entire Chapter and good reasons for Visitors to join.

President Note: Be sure to notify new and renewing Members in advance to be prepared to briefly share why they applied for or renewed their BNI membership.

0:26 8. ★ Weekly Presentations

Goal:

- This is second most important part of the meeting. Each Member introduces themselves, explain to Members what they do and ask for connections to their best target customers.
- Use your 30 to 60 second Weekly Presentation to educate your referral marketing team on who you are, what you do, how you add value and how to find referrals for you.
- While listening to each Member, consider whether over the last week you’ve heard anyone using the language of referrals to signal the opportunity for referrals.

President Script: “Members will now give their Weekly Presentations. This is your opportunity to continue the process of educating your referral marketing team on who you are, what you do, how you add value and how to find referrals for you. Please include your name, business name and specific referral request. Substitutes, during Member introductions, give the Weekly Presentation for the Member you are substituting for. We will be timing our Weekly Presentations today, so keep your eyes on our timekeeper.”

President Note:

- Include BNI Ambassadors and Directors with the Members, if in attendance.
- When people exceed their time, please stand and say Thank You.
- When the Chapter membership exceeds 60 Members, it is important to expand the meeting time from 90 minutes. Each Member needs to have at least 30 seconds to complete their Weekly Presentations as a Member benefit.

Secretary/Treasurer Note: The timekeeper may consider using the BNI Timer App or flags for timing Weekly Presentations. For example, the yellow flag means you have 10 seconds, the red flag means time is up.

0:49 9. Welcome Visitors to BNI Chapter Meeting

(After all Members have presented) "Visitors, it is now time for you to introduce yourself. Please educate us on your business and tell us how we can find referrals for you. You will also be timed so keep your eyes on our timekeeper."

0:51 10. Vice President's Report**Goal:**

- To keep Members excited about generating referrals, the Vice President provides the "PALMS Report" statistics: average number of monthly referrals, average number of monthly visitors and the total referrals to date.
- Identify where you are on the report and consider how you can pass more referrals and sponsor more Members to practice Givers Gain and increase the results of your Chapter.
- This weekly report is derived from the Summary PALMS Report in BNI Connect and is no more than two minutes in length.

Vice President Script: "I'd like to share the results of our business activities ...

- Average number of monthly referrals
- Average number of monthly visitors
- Total referrals to date
- Total Thank You for Closed Business last month
- Total Thank You for Closed Business to date

To ensure that our results remain up to date, please remember to submit your activities online each week."

Vice President Note: Please reference your Chapter Goal Boards, if utilized.

0:52 11. Membership Committee Report**Goal:**

- Delivered by the Vice President or a Membership Committee Member, this report updates Members regarding professions needed in the Chapter, pending applications and policies and matters of interest from the Membership Committee.
- Fill in gaps within your referral network by inviting visitors and sponsoring new Members.

Vice President Action: Ensure a Membership Committee Member is pre-selected for this report each week.

Key Points:

Mention the professions of the visitors in the room as professions that the Chapter is seeking to fill. This will make the Visitors feel welcome and important.

0:53 12. Introduction of Featured Speaker(s)**Goal:**

- The Secretary/Treasurer announces the speakers for the next six weeks and introduces this meeting's speaker using the Member's Biography Sheet (found in the Member's BNI Connect Profile).

- Customizing Member Presentations to address the needs of the Members will result in a better presentation.

Secretary/Treasurer Action:

- Announce upcoming speakers for the next six weeks.
- Remind upcoming speakers to bring a door prize.
- Deliver an engaging, professional introduction for this week's Featured Speaker(s) using the Biography Sheet.

Secretary/Treasurer Note:

- Schedule your upcoming featured speakers for 8-12 weeks. Please refer to the "Manage Feature Presentations" presentation on BNI Business Builder for more information.
- Request a title for each speaker's presentation.
- Enter next month's upcoming speakers on BNI Connect, so Members receive reminder emails.

Key Points:

- By entering your upcoming speakers on BNI Connect, your fellow Members will be highlighted on your Chapter website.
- Members can invite visitors based on the Speaker's topic of interest.

0:54 13. Speaker(s) Give 5-10 Minute Feature Presentation**Goal:**

- One or two Members provide a presentation that gives Members greater clarity as to the target market and business to help generate more referrals.
- Always listen with a "beginner's mind."
- Look for new ideas or for things you used to know but have recently forgotten. A 5 to 10-minute detailed business presentation.

President Script: "Now that we know more about _____, let's do our best to bring them a referral next week."

1:04 14. ★ Referrals & Testimonials**Goal:**

- All Members stand for this, the most important part of the meeting.
- Members report referrals given, share visitors in attendance, or provide a testimonial for any Member of the Chapter.
- Make the decision to set aside the time throughout the week to ensure you always have a referral to report or a testimonial to provide.

President Script: "This is the most important part of the meeting. All Members of this Chapter stand and participate. Keep it brief and positive. Start with 'I have' Examples include referrals, visitors or testimonials. All other activity should be recorded in the BNI Connect Mobile App. Visitors, tell us briefly what impressed you most about the meeting."

President Notes:

- Since all activity is entered into the BNI Connect mobile app, it is important that the energy is main very high during this part of the meeting. It is the most important part of the meeting. Consider the following:
- Remind Members to be excited. They are helping a Member grow their business.
- Have each Member state how many referrals and visitors they have before naming the Members. "I have 3 referrals, one for Robin for copywriting, one for Vince for travel and one for Hazel for coaching."
- At the end, give a summary of how many referrals and visitors were reported in the meeting. "In summary, we had 3 visitors and passed 68 referrals this week. That is 68+ opportunities to close sales."

Key Points:

- Members are encouraged to focus their testimonial time on one person as well as submit it in writing.
- Starting with Members allows visitors an opportunity to observe then comment on the power of the Referrals & Testimonials.

1:22 15. Referral Quality Check**Goal:**

- The Vice President chooses two referrals from two weeks prior and asks the Members who shared them to stand to report the outcome to the Chapter.
- Consider what makes a quality referral so you can strive to become the best Master Connector you can be.

Definition: Vice President picks two referrals from two weeks prior. Ask the Members who received the referrals to stand and share the status.

Vice President Script: "This is the quality control portion of our meeting. For the Member who received the referral,

- Have you called the referral?
- Was the other person prepared to take your call?
- Was this an opportunity to do business?"

1:24 16. ★ Visitor Recognition**Goal:**

- The President excuses visitors to another room to speak with the Visitor Host for more information to consider applying for membership in the Chapter.

Definition: President acknowledges and thanks the Visitors for attending, directing them toward the Visitor Orientation.

President Script: "Visitors, do you think your business could benefit from referrals from Members of our BNI Chapter?"

Only one person can become a Member from your BNI Classification. Positions tend to fill up very quickly. While you are securing your position, upon acceptance by the Membership Committee, will also lock out your competitors from the Chapter!

Will the Visitor Host Team please stand? Will our Visitors please stand? Thank you for being here today. The Visitor Host Team will now meet with you to answer any questions and walk you through the next steps. You may leave your things here, as you may come back and network after the brief orientation is complete. Thanks again for being here today!"

President Notes:

- For recognition, ask Visitors and Visitor Host(s) to stand and stay standing.
- The appropriate number of Visitors Hosts exit with the Visitors. For example, 4 Visitor Hosts do not exit to conduct Visitor Orientation for only 1 or 2 visitors.
- Pause to allow them to leave the meeting area (or proceed to Announcements if Visitor Orientation is conducted after meeting).

1:26 17. Secretary/Treasurer's Report:

Goal:

- Increase Member renewal rates by inviting expiring Members to renew.
- Each week, announce Members up for renewal as indicated on the Membership Dues Report in BNI Connect.

Secretary/Treasurer Script: "The following Members are up for renewal in the next 90 days ... _____, _____, _____. To apply for renewal of your membership, please submit your Renewal Application online in BNI Connect or see me for details."

Secretary/Treasurer Note: This statement is repeated each week for any Member whose membership is already overdue or who have not yet submitted their renewal with the appropriate participation fees.

1:28 18. BNI Announcements, Reminders, and Special Reports

Goal:

- Deliver more value to Members and increase participation at other BNI networking events, Member training programs and other regional activities.

Key Points:

- Use this as an opportunity to promote upcoming BNI related events. Have Members share testimonials on their past experience attending these events.

1:29 19. (Optional) Door Prize Drawing(s) for Members Bringing Visitors or Referrals

Goal:

- A celebration and a chance to have fun and build relationships among Chapter Members. The Door Prize Drawing is recognition for Members bringing first time visitors or referrals.
- Each featured speaker brings a door prize.
- The Vice President conducts the drawings each week.

Vice President Notes:

- Prior to the meeting start, ensure that today's door prizes are present and business appropriate.
- Ensure the Chapter has a backup plan for a door prize.

1:30 20. Close Meeting

Definition: The President or a designated Member gives a positive quote for the week and requests that Members focus on bringing referrals or visitors for the next meeting.

Additionally, the President ends the meeting with:

"We will see you all at next week's meeting, which begins ... right now!"

★*Visitor Orientation is in progress.

Immediately following the meeting, the President or designee conducts a New Member Orientation and informs new Members that they are required to attend the Member Success Program.

★Hidden Elements of the Meeting



BNI Online® Meeting Agenda Outline

1. Open Networking
2. Welcome Members and Visitors
3. Focus Core Value of the Week
4. Leadership Team Recognition
5. Networking Education
6. Members Introduce Themselves and Give their Weekly Presentation
7. Visitor Presentations
8. Business Generating Activity
9. Featured Speaker(s) Give 5-12 Minute Feature Presentation(s)
10. Referral and Testimonials
11. Celebrations (VP Report, New and Renewing Members, Notable Networkers)
12. Close Meeting (Thank Visitors, and BNI® Announcements)

BNI Online® Meeting Agenda Detail

After two years of BNI Online® meetings, the feedback received from our Members overwhelmingly asked to simplify the BNI Meeting agenda to help with timing and Member engagement. The following BNI Online Meeting Agenda has been tested and adjusted with an official pilot program. You may notice a few agenda points have been combined to allow for fewer transitions to make the meeting smoother and easier to follow in a Zoom format. Our Core Value of Traditions + Innovation was in full effect and the main points of the BNI agenda are still included, with an additional business generating activity.

The Leadership Team and Visitor Hosts★ arrive a minimum of 15 minutes prior to the designated meeting time to welcome visitors. **Note:** The Chapter Leaders will make or break the quality of most meetings! Be positive, professional, and enthusiastic.

Before Open Networking begins, be sure the Zoom platform is ready with breakout rooms. For more assistance with breakout room set-up, go to <https://support.zoom.us/hc/en-us> and search “breakout rooms”. We recommend these formats that can be rotated weekly as needed:

- Randomly assign two to three Members into rooms to have mini-One-to-Ones
- Create and assign breakout rooms based on Contact Spheres
- Allow Members to choose their room based on selected given topics
- *Be sure there is a Visitor specific breakout room for the Visitor Hosts to give a quick review of what to expect in the meeting.

Suggested Open Networking topics include:

What is a business hurdle you have overcome?

How do you think being an entrepreneur has helped you grow personally?

How has the past prepared you for the present?

What is a common misconception in your industry and how do you overcome it?

0:00 1. ★ Open Networking**Goal:**

- This portion of the meeting is an open time for Members to build stronger relationships with each other and to meet visitors.
- Leadership Team helps to assure speakers, mics, and cameras are working by welcoming members and asking them to turn on their camera and say hello.
- Ideally Members network in the breakout rooms designed for the week using this time to foster stronger relationships, set up One-to-Ones, follow up on referrals, and engage visitors.
- First, the Visitor Hosts meet with the visitors in the Visitor Breakout room for a brief premeeting orientation. Then, visitors can move to an Open Networking breakout room.

President Script: *Varies as Members and Visitors join the meeting and may be repeated.* “Welcome to the BNI _____ Chapter! Members, please take a moment to check your audio and video settings, turn on your cameras and say hello. Our Open Networking has begun and today we have _____ breakout rooms. Visitors, please join us first in the Visitors’ Breakout room to get a quick review of what to expect during today’s meeting.

0:15 2. Welcome Members & Visitors**Goal:**

- The President begins the next portion of the meeting and sets the tone for the remainder.
- Ensure our Visitors and Members feel welcomed and included.

President Script: “Thank you for joining us for our BNI Online Meeting today. Let’s move to the next part of the meeting. A few announcements for you as we kick-off this portion of our meeting:

- Please keep your camera on and mute your line until it is your turn to speak.
- Be ready to deliver your [number of seconds] -second Weekly Presentation.

“I would like to welcome our Visitors and Substitutes. First let me introduce [first and last name] of [company]. They are a/an [profession] who was invited by [Member Name].”

Repeat for all Visitors.

“Now on to our substitutes ...” (using the outline above)

“Visitors, we are glad to have you with us today. Our goals are that you have an exceptional meeting experience and that you see the possible connections within our chapter that can help you grow your business. At the end of our meeting today [Visitor Host’s name] will meet with you in a breakout room to answer any questions and discuss next steps.”

President Note: Observers, including those from newly forming Chapters, should designate one representative to speak on behalf of all observers.

0:16 3. Focus Core Value of the Week and What it Means to Them**Goal:**

- Remind our Members of the core principles that bind us together.
- Engage our Members by asking a different Member IN ADVANCE each week to highlight one of our Core Values.

President Script: “Each week, we are reminded that the essence of what binds us together as a community is our Core Values. Today I would like to call on [Member name] to share a Core Value moment.”

0:17 4. Leadership Team Recognition

- The President introduces the Leadership Team [name and role] as shown on the slide deck.
- In the interest of time, it is recommended that the President introduces everyone rather than have them introduce themselves.

0:18 5. Networking Education

The Education Coordinator (or a Member assigned in advance by the Education Coordinator) delivers a 1- to 5-minute presentation on networking.

Goal:

- In the spirit of our Core Value of Lifelong Learning, an Education Moment is presented to help our Members enhance their networking skills.

Key Points:

- Can be used to highlight those who have excelled in Member participation (for example, inviting Visitors or passing referrals) by having them share their techniques.
- Can be used as an opportunity to positively address a general Membership Committee topic that would help Members to be even better networkers.

0:21 6. ★ Member Weekly Presentations**Goal:**

- For Members to educate their referral partners on how to connect them to a business opportunity.

Key Points:

- Use slides with built-in timers to help the meeting stay on time.
- Be sure to give clear instructions to Visitors and Substitutes so they feel more prepared and ready when it is their turn.

President Script: “Members will now give their Weekly Presentations. This is your opportunity to continue the process of educating your referral marketing team on who you are, what you do, and how to find referrals for you. Please include your name,

business name and specific referral request. Presentations are ordered by contact sphere.”

“Substitutes, during Member introductions, give the Weekly Presentation for the Member you are representing.”

“For our Visitors, after the Members and substitutes have finished, we’ll call on you have you tell us about your business and how we can help you. “

“On the slides, you will note open positions in each contact sphere. Be thinking of business professionals you know that could fill these positions in our Chapter. When it is your turn please unmute, deliver your presentation, and mute yourself again.”

0:38 7. Visitor Presentations

President Script: “Now it is time for our Visitors to give your Weekly Presentation. Please educate us on your business and tell us how we can find referrals for you. You will also be timed, so please keep your presentation to [number of seconds]. For ease, we will go in alphabetical order by first name.....”

0:44 8. Business Generating Activity

Goal:

- **Encourage additional Member and Visitor participation, build relationships, and to possibly pass referrals.**

President Script:

“In observance of our Core Values of Building Relations and Givers Gain® we are going to return to breakout rooms to continue conversations and discuss referral opportunities for each other. So that everyone has an opportunity to contribute, please take about 2 minutes each to speak. You may want to assign a timekeeper. When the breakout time is over, the rooms will automatically close and bring you back to the main meeting room where we will continue the rest of the meeting.”

Key Points:

- Suggested breakout rooms:
 - By Contact Sphere
 - Random assignment
 - Participants’ Choice (if choosing this option be sure to announce number of participants per room to keep rooms small)
 - Separate Visitor Orientation Breakout room (halfway point check-in)

You can give a conversation prompt if needed.

0:54 9. Feature Speaker(s)

An opportunity for Members to further educate their referral partners on the specific types of referrals they are seeking and how to make the introduction.

Goal:

- Speaker to educate the Members about their specific business requests and how to start conversations on their behalf.

Key Points:

- Secretary/Treasurer or designee briefly introduces the Feature Speaker using a prepared Biography Sheet.

President Script: “Now that we know more about [speaker name]’s specific requests, let’s focus on finding referrals for them this week.”

1:02 10. ★ Referrals and Testimonials

Goal:

- Impress the visitors and inspire our Members with the referral activity and the power of the member testimonials.

Key Points:

- Members report referrals given or provide a testimonial for another Member of the Chapter.
- Encourage one testimonial per member, if not reporting on referrals.
- To keep it simple, Members go first in the same order as the Weekly Presentations, then move to Visitors and Substitutes.

President Script: “Next, we move to the referral and testimonial portion of our meeting. All the Chapter Members participate. Visitors and other guests will have an opportunity after the Members to share what impressed you most about the meeting. Keep it brief and start with ‘My contribution this week is....

Acceptable contributions include referrals given, visitors, or a testimonial. All other activity should be recorded in the BNI Connect® Mobile App.”

After everyone has contributed:

“In summary/great work, we had [number of visitors] visitors and passed [number of referrals] referrals this week. That is [number of referrals] opportunities for Member business growth.”

1:12 11. ★ Celebrations

Vice President’s Report, New & Renewing Members, and monthly Notable Networkers.

Key Points:

- The VP report highlights the success of the chapter and doing so recognizes Members that contributed to achieving the results. .
- Truly celebrate the high achieving Members with the most referrals, Thank You For Closed Business and Visitors by:
 - Including their pictures on the slides
 - Highlighting each Notable Networker individually
 - Chapter Members can unmute and cheer or clap
- The VP Report is given weekly, and in order to stay on track with the time consider alternating which piece(s) of this additional celebrations are announced each week. **Notable Networkers and New & Renewing Members could be alternated if needed.

President Script:

“Before we wrap up, and to highlight our core values of recognition and accountability I will call on our Vice president to deliver their Report.

Vice President Script:

“This week we celebrate our achievements in [*number reporting this week]
To ensure that our results remain up to date, please remember to submit your activities electronically using the BNI Connect or the mobile app each week.”

* For the previous month, we’d like to acknowledge our top-performing Members for ...
...”

- *Average number of monthly referrals
- *Average number of monthly visitors
- *Total referrals to date
- *Total Thank You For Closed Business last month
- *Total Thank You for Closed Business to date

*** Congratulations to our new and renewing Members [Names]! If you are renewing, please briefly share with the Chapter why you have chosen to renew your membership. If you are a new Member, please briefly highlight why you chose to join.”

1:15 12. Close

Share upcoming events, thank visitors, and relaunch breakout rooms for ★Visitor Orientation and Member Networking. End with Positive Quote

Goal:

- Wrap up the meeting with positive energy and inspire Members to continue their Givers Gain® activities until the next meeting.

Key Points:

- Encouraging the Visitors to return to the breakout room is critical because it allows us to show them how BNI can help them grow their business.
- Before the announcements, reopen the breakout rooms and invite the visitors to an effective Visitor Orientation.
- Announcements are for networking and BNI related events.

President Script:

“Thank you, visitors, for joining us for our meeting today! We’d like to now invite you to join our Visitor Host in the Visitor Breakout Room for a quick interest session so that you can ask any questions you may have and hear more about how our Chapter can help you grow your business.”

After the Visitors have joined their breakout room, finish the meeting with the announcements and quote.

“We will see you all at next week’s meeting, which begins ... right now!”

Large Chapter Agenda Adjustments

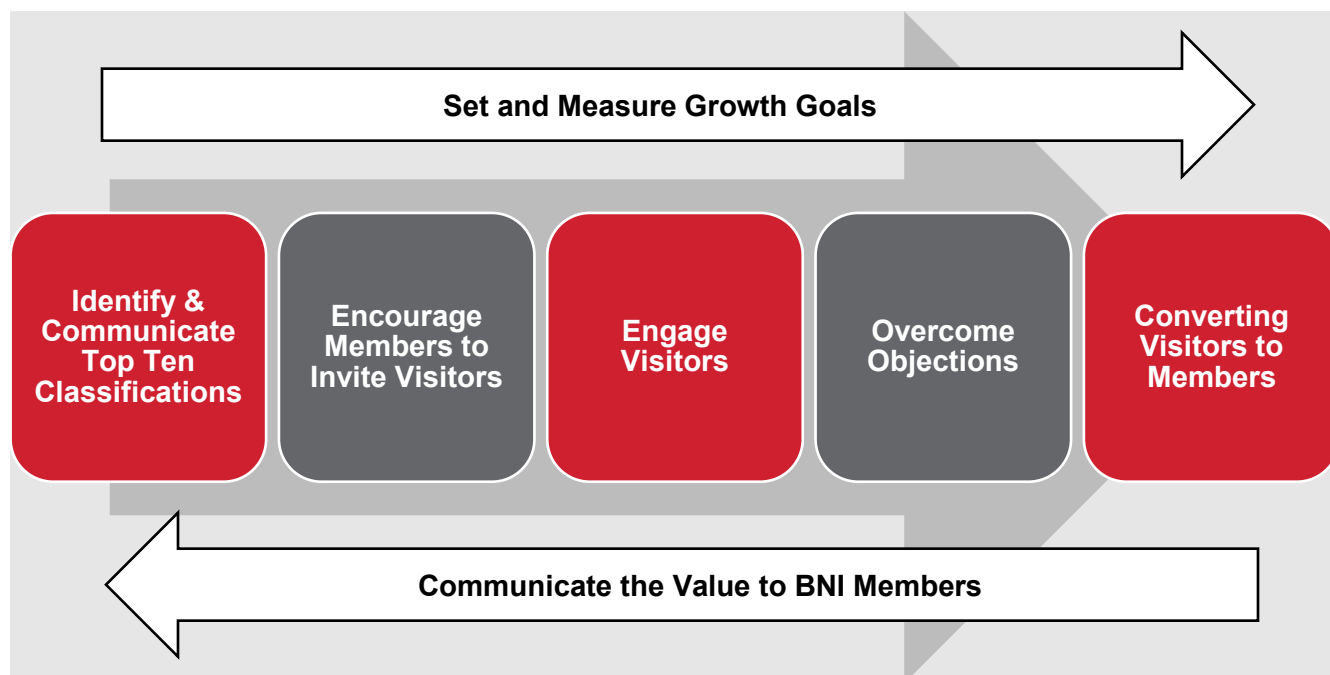
- All times listed assume a 7:00 am start time. Please adjust your times accordingly, if necessary. Chapters with 50+ Members may collectively agree to facilitate the BNI Weekly Meeting Agenda beyond 90 minutes with Executive Director/Regional Director approval.

	Up to 50 Members	51-70 Members	71+ Members
Open Networking Begins	7:00 am or earlier	6:45 am or earlier	6:30 am or earlier
Structured Agenda Begins	7:15 am	7:00 am	6:45 am
Visitor Introductions	Name and business name only	Name and business name only	Name and business name only
Networking Education	3-5 minutes	3 minutes	3 minutes
Weekly Presentations	Up to 60 seconds	Up to 45 seconds	Up to 30 seconds
Feature Presentations	Up to 2 speakers; Up to 10 minutes total	Up to 2 speakers; Up to 10 minutes total	Up to 2 speakers; Up to 10 minutes total
Member Referral/Testimonial	Up to 30 seconds	Up to 25 seconds	Up to 20 seconds
Visitor Weekly Contributions	Up to 15 Seconds	Up to 15 Seconds	Select two Visitors to share positive feedback; Up to 15 Seconds

Chapter Processes

Growth

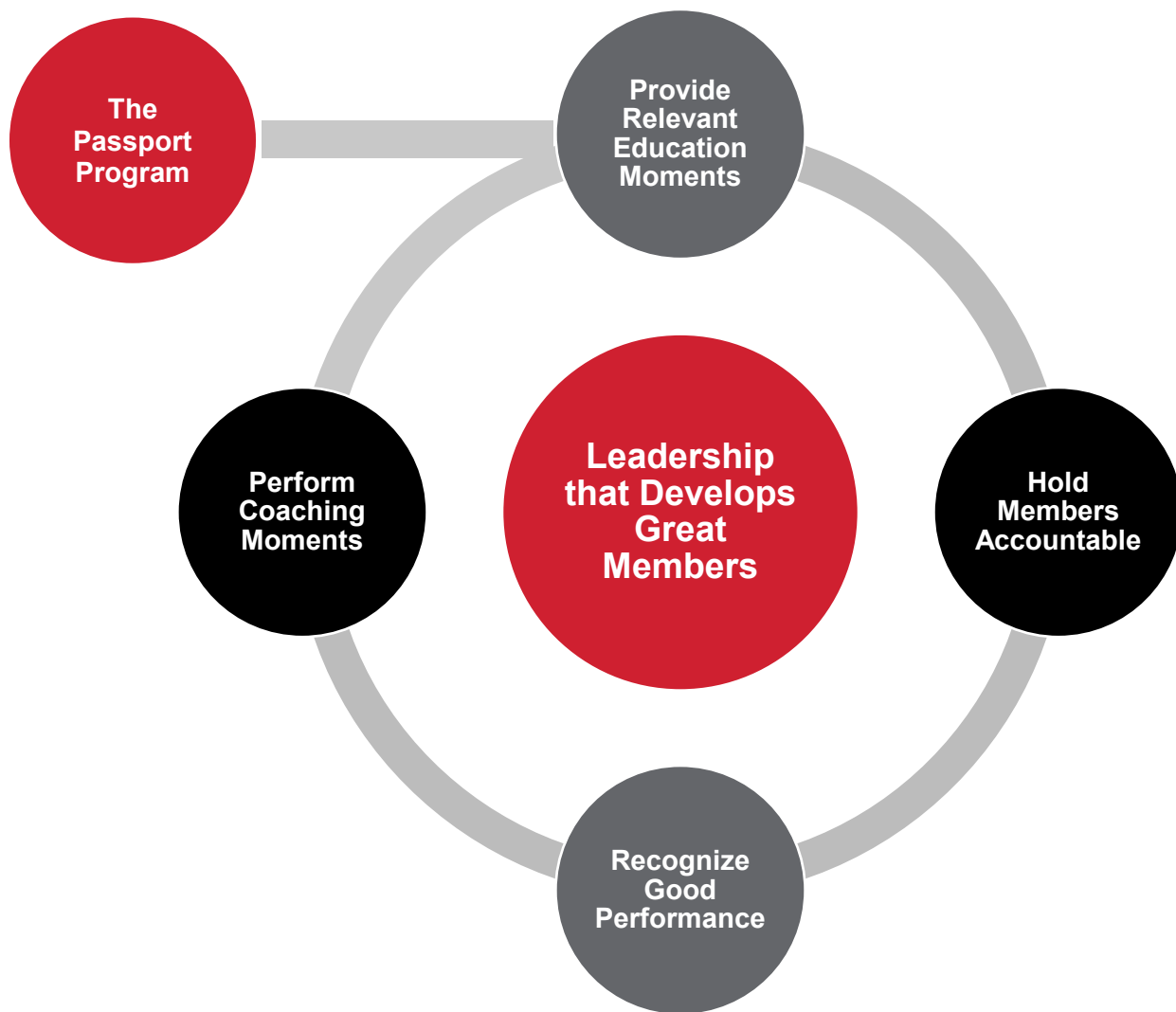
Growth happens when the Chapter is healthy. The whole Leadership Team works to set and review the goals of the Chapter at each Chapter Success Meeting. The Membership Committee Community Builder helps develop the top ten lists. All Leadership Team Members encourage Members to invite and engage visitors with the Membership Committee being the accountability arm ensuring all Members are engaged. Ultimately, it is the Visitor Host and follow up efforts from the Regional Team that support overcoming objections and converting visitors into Members. If this process is working, a Chapter will grow without any specific growth mechanisms.



Member Development

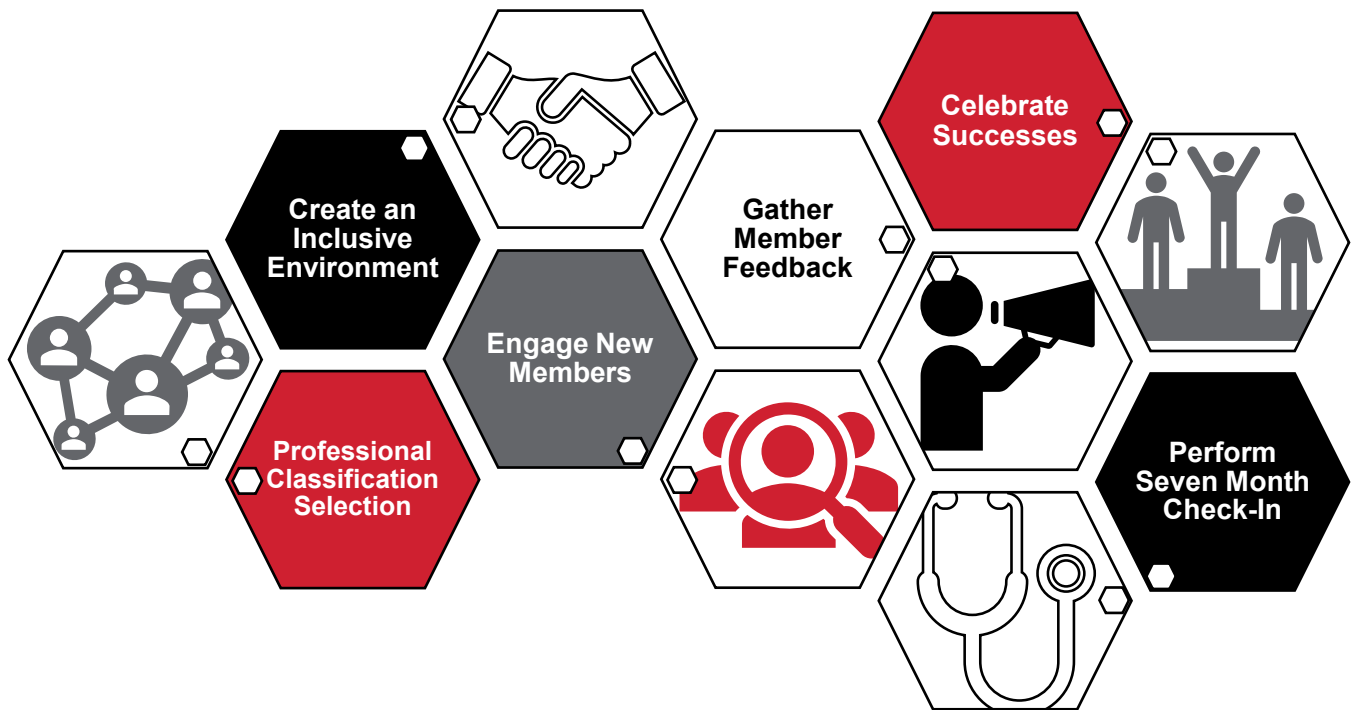
To maximize the potential for your success, it is imperative that each Member learn to use the BNI system efficiently and effectively. This begins with the Member Success Program 2.0 (MSP) and the Passport to Success/New Member Mentorship Program that is administered to the new Members by the Mentor Coordinator and trained Member Mentors.

Coordinators provide continuous learning opportunities for all Members. Through strong leadership and productive conversations in the Chapter Success Meeting, the Membership Committee will be able to hold Members accountable, recognize good performance and perform coaching moments as needed.



Retention of Members

In addition to the Member Development processes, the following are key to retention of Members. All Members are responsible for creating an inclusive environment, engaging new Members, and celebrating successes. It is part of leadership. Ensuring there is cooperation amongst all Members in the Chapter through the selection of BNI Classifications is a key responsibility of the Quality Assurance Membership Committee Member. Many conflicts can be avoided if this process is thoughtful. Gathering feedback, through the Seven-Month review and other surveys, informs the Leadership Team of adjustments that need to be made to ensure Members are happy and successful. This is driven by the Member Engagement Membership Committee Member and other participants of the Chapter Success Meeting.



Monthly Chapter Success Meeting

The Chapter Success Meeting is the former Leadership Team Meeting and Membership Committee Meeting wrapped into one. For best results, schedule the same week (first or second week) of each month of the year. You may choose to align it with the Director Consultant visits to the Chapter.

Agenda and Instructions

Attendees

- The Vice President and Membership Committee are present for the entire meeting.
- The President, Secretary/Treasurer and Visitor Host Coordinator (optional) will attend through the Passport to Success Progress agenda item.
- The Mentor Coordinator will attend through the Power of One Report review.

Preparation for the Meeting

In preparation for the meeting, copies of the following reports should be available during the meeting:

- | | |
|---|--|
| • Chapter Success Meeting Report – blank | • Chapter Traffic Lights – BNI Connect |
| • Chapter Success Meeting Report – previous month | • Member Traffic Lights Report/Power of One Report |
| • Chapter Visitor Report – BNI Connect | • Membership Dues Report – BNI Connect |
| • Chapter Roster Report – BNI Connect | • Seven-Month Check-in (as many as needed) |

As the Meeting Begins

- Enter the Chapter name, your name and date
- Enter the names of the people in attendance

Agenda

The President facilitates the first half of the meeting.

1. Review action items from last meeting
 - a. The Vice President reads from the previous month's Chapter Success Meeting Report any action items documented.
 - b. Each person who received an action item from the previous meeting reports on the status.
2. Review visitor attendance
 - a. The Secretary/Treasurer or Visitor Host Coordinator reports the number of visitors in attendance last month.
 - b. The Secretary/Treasurer or Visitor Host Coordinator states, by name and category, the visitors who submitted applications.
 - c. The Secretary/Treasurer or Visitor Host Coordinator states, by name and category, the visitors who could convert to Members with some additional follow-up.

3. Membership Review – This information can be pulled from the Roster Sheet dated the previous month.
 - a. The Vice President or assigned Membership Committee Member reports the number of new Members last month and mentions them by name.
 - b. The Vice President or assigned Membership Committee Member reports the number of dropped Members last month and mentions them by name.
 - c. The Vice President or assigned Membership Committee Member discusses with the attendees the net growth for the previous month. The goal of the Chapter should be net one if the Chapter wants to remain the same size and net two or more if the Chapter wants to be on a growth path.
4. Reports Review – Reports needed include the Chapter Roster Report and Chapter Traffic Lights.
 - a. Review the Chapter Roster Report to determine if the Chapter has a complete Leadership Team. If not, the Leadership Team Members with open roles should fill those roles within the next month.
 - b. Review the Chapter Roster Report to determine how the Chapter performed in the three-month PALMS. It is important to look at this trend compared to the Chapter Traffic Lights to see if there is a change in performance. The Chapter Traffic Lights shows the last six months which makes it hard to see recent trends.
 - c. Review the Chapter Traffic Lights. The Chapter should have the goal of being in the top percentage bracket in all areas if possible. Depending on the size of the Chapter and the goal for inviting visitors, it may be acceptable for the visitor conversion rate to be lower than the maximum point value.
5. Other topics as needed
 - a. Secretary/Treasurer reports on Chapter finances.
 - b. Should the Chapter be looking for another venue? How are venue relations?
 - c. How can concerns be addressed before they become written complaints?

How did the weekly meeting look to the Director Consultant?

6. MSP completion and Passport to Success/New Member Mentorship Program
 - a. Discuss each Member by name and their progress through the program generally.
 - b. Discuss in detail new Members who are not on track. Brainstorm ideas to help them get back on track.

<i>At this point the President, Secretary/Treasurer and Visitors Host leave the meeting.</i>
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The Vice President facilitates the remainder of the meeting.

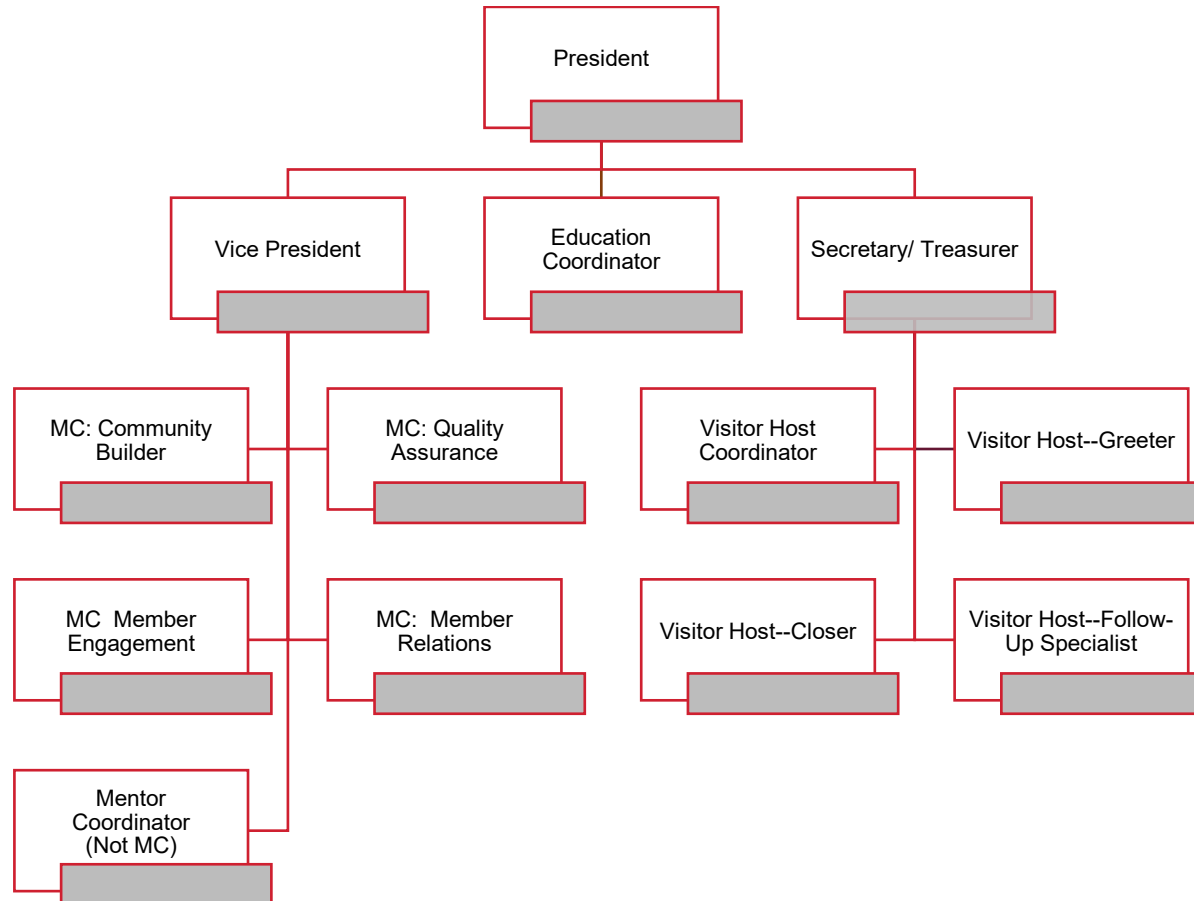
7. Member Traffic Lights based on the Power of One
 - a. Look at the distribution of green, yellow, red, and grey. The goal is to have as many Members as possible in the green. What can be done to move people from yellow to green, red to yellow, and grey to red? How can the Education Moments be used to improve Member performance?

- b. For the Members in the bottom three positions. What can be done to help them improve performance? Note: There is a misconception that new Members can be in the grey without alarm. If the new Members have completed MSP and are actively involved in the Passport to Success Program, they will be in the yellow (completing Member Success Program for CEUs, completing one to two One-to-Ones per week and attending meetings regularly achieves 60 points).
- c. Discuss how the Mentor Coordinator can help support getting these Members more engaged.

At this point the Mentor Coordinator leaves the meeting. Only the Vice President, Membership Committee and Director Consultant (if present) are in attendance for the remainder.

- 8. Seven-Month Check-In – This information can be found on the Membership Dues Report.
 - a. Who is up for renewal in five months?
 - b. Who is the best person on the Membership Committee to have a one-to-one conversation with the Member? This person needs to have a relationship but not be so close that the conversation can't be constructive.
 - c. Complete the top portion of the Seven-Month Check-In for each person up for renewal in five months.
- 9. Approving Renewals – This information can be found on the Membership Dues Report.
 - a. Who is up for renewal in the next 60 days?
 - b. If the person is going to be renewed, it can be communicated immediately.
 - c. If a person is not going to be renewed, it must not be a surprise. It is important the Seven-Month Review reflected that the Member had many development opportunities. If it would be a surprise to the person, a coaching conversation must be had in the next 30 days to explain the situation. The final decision on non-renewal should happen on or around the Member's renewal date.
 - d. It is important that the BNI Regional Office knows the person is not going to be renewed so that administrative processes like reminders can be stopped. Please communicate non-renewals to the BNI Regional Office in the way they have been prescribed.
- 10. Progress of Complaints (if applicable).
 - a. All complaints should be handled upon receipt. This is the time for the Membership Committee to review status and determine next steps to urgently complete review processes.
 - b. Has the Secretary/Treasurer had any issues with people paying Chapter Dues that need to be addressed?
- 11. Recommendations for the Chapter President – Add any action items for the President here. Ensure they are communicated to them immediately after the meeting.
- 12. Recommendations for Education Coordinator – Add any suggestions of topics for the Education Coordinator based on chapter needs that were identified during the meeting.
- 13. Recommendations for the Director Consultant – Add any action items for the Director Consultant here. Ensure they are communicated to them immediately after the meeting.

Chapter Organizational Chart



President

The President facilitates a smooth, timely meeting by following the BNI Weekly Meeting Agenda focused on educating the visitors about BNI; facilitates monthly Chapter Success Meetings; ensures all leaders are fulfilling their responsibilities; provides direction and motivation for the Chapter to meet its goals; communicates weekly with the Director Consultant.

President Checklist of Responsibilities

To be on the Leadership Team, the President agrees to:

- ☐ Fulfill the responsibilities listed below
- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

BEFORE the Chapter Meeting each Week (*Please note that not all items are applicable to chapters meeting online.)

- ☐ After Membership Committee approval, call to welcome accepted applicants to the Chapter
- ☐ Arrive 15 minutes early to the meeting
- ☐ Check on room/meeting setup/technology set up if online
- ☐ Appropriate signage at main entrances, or professional backgrounds if online
- ☐ Confirm Visitor Host & Member Resource Tables or Visitor and Member Breakout Rooms are ready
- ☐ Prepare for a successful meeting
- ☐ Business Cards set up
- ☐ BNI Weekly Chapter Meeting Agenda on table
- ☐ Optional Door Prize at front of room
- ☐ Member Success Kits ready to induct new Members
- ☐ Purpose & Overview and Core Value Moment assigned to Members
- ☐ Know who is prepared to deliver the Membership Committee Report
- ☐ Positive quote prepared for end of meeting

DURING the Chapter Meeting Each Week

- ☐ Flash the lights/Get Members' attention at 3 minutes prior to starting formal agenda (0:12)
- ☐ Proceed with formal part of the agenda (0:15)
- ☐ Run the Chapter Meeting according to the [BNI In-Person Weekly Chapter Meeting Agenda](#) or the [BNI Online® Chapter Meeting Agenda](#).
- ☐ Ensure all Leadership Team Members are fulfilling their roles/reports during the meeting

AFTER the Chapter Meeting Each Week

- ☐ Participate in the Weekly Chapter Success Call with your Director (along with your Vice President and Secretary/Treasurer) Send a weekly follow-up and reminder email to all Members. Recap meeting happenings, announce upcoming speakers, Meeting Stimulants, events and reminders.
- ☐ Call visitors within one day of your weekly meeting to thank them and answer any questions

AS NEEDED

- ☐ Conduct One-to-Ones with new Members as part of the Passport to Success Mentor Program
- ☐ Participate in the Leadership Team Selection Process as guided by your Director.

MONTHLY

- ☐ Facilitate the first half of the Chapter Success Meeting. If present, your Director Consultant may attend
- ☐ Review monthly reports and records
- ☐ Attend monthly support and training opportunities as offered by the BNI Regional Office
- ☐ Order supplies as needed
- ☐ Select one meeting theme to use during one Chapter meeting per month
- ☐ Attend the monthly Leadership Roundtable or have a Chapter leader attend in your place

REPORTS

- ☐ Verify that the Vice President has sent the Chapter Success Meeting Report to your Chapter Support Director or the BNI Regional Office monthly and has updated and submitted the PALMS Report in BNI Connect on a weekly basis.

Chapter Supplies

Be sure your Chapter is supplied with all the materials you need to run your Chapter efficiently and effectively. Consider the impact to the Visitor Experience if Chapters are out of pertinent informational materials.

Weekly Follow-Up & Reminder Email Communication

Weekly follow-up and reminder emails are essential to ongoing communication between Chapter Members about Chapter happenings. Here is an example of an outline to develop your weekly email reminders:

- Weekly Presentation Topic
- Weekly Stats / VP Report
- Last week we passed ____ referrals, had ____ One-to-Ones and reported \$_____ in business
- Upcoming Speakers
- Purpose & Overview
- Networking Education
- Feature Presentation
- Closing Quote
- Welcome New & Renewing Members

- Chapter Facebook Page, Chapter Website
- Chapter Goals
- Top Five Professions Wanted
- Upcoming Events

In-Person Chapter Meeting Venue

- Is the location easy to find with ample signage?
- Is there adequate and easy to find parking?
- Is the room available at least 30 minutes prior and 30 minutes after meeting time for set up, networking and clean up?
- Who is responsible for opening the doors?
- Can the room be set in a horseshoe, square or boardroom seating arrangement?
- Is there at least 10+ extra chairs beyond those used by your Members and visitors?
- Does the venue portray a high-quality, professional business image?

All venue changes are subject to the approval of the Regional or Area Director PRIOR to making a change. Please contact your Chapter Director as soon as a venue change becomes necessary. The Director's role is to ensure all Chapters meet in high-quality venues that display a high level of professionalism.

Do you have a backup plan? What happens when the venue calls you the night before your Chapter meeting and says that your room won't be available in the morning? Prepare for the unexpected by having a backup venue in mind that may work at the last minute. Develop a communication system that will ensure all Members get the message at the last minute. Put up a sign at your normal venue to indicate the last-minute venue change. Don't let someone else's actions interfere with your Chapter's opportunity to do business!

Meeting Themes

Historically, Meeting Stimulants were recommendations for making Weekly Presentations fun and interesting. The Chapters who have grown the membership and closed business significantly for their Chapter and Members took this idea a step forward. The Chapter Leadership Team chooses a theme for one week, once a month or less. The theme may be:

- Business Owners/CEOs
- Homeowners
- Substitutes
- Getting Healthy
- Visitors Day (also known as Open Business Days)
- Bring Your Best Client Day
- Stack Days
- Contact Sphere Days, etc.

Once the theme is selected in advance, Members should invite people who would be interested in the theme. Members should contour their Weekly Presentations.



Annual Theme Calendar (Sample)

Chapter Name: _____ Term Date: _____

Month	Marketing Strategy	Begin Date	End Date	Goal	Outcome Result
OCT	Networking Mixer				
NOV	Real Estate Day				
DEC	Toy Donation				
JAN	Construction Day				
FEB	<i>International Networking Week</i> Bring Your Best Client Day				
MAR	CEO/Business Owner Day				
APR	Visitors Day Program			# Invitations Per Member: _____. # Invitations for Chapter: _____.	
MAY	Visitors Day Program			# New Members: _____	
JUN	Bring a New Substitute Day				
JUL	Begin BNI Game				
AUG	End BNI Game				
SEP	Health & Beauty Day				

Vice President

The Vice President is the manager of the Membership Committee; conducts monthly and brief weekly Membership Committee meetings to ensure all Membership Applications are being reviewed and issues are being handled in a timely manner; keeps accurate records of attendance, referrals given and received, visitors, One-to-Ones and closed business; enforces the attendance policy by monitoring the automated attendance emails and assigning Membership Committee Members to make follow-up phone calls; helps motivate the Chapter to achieve its goals.

Vice President Checklist of Responsibilities

To be on the Leadership Team, the Vice President agrees to the following requirements:

- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

BEFORE the Chapter Meeting each Week (*Please note that not all items are applicable to chapters meeting online.)

- ☐ After Membership Committee approval, call to welcome accepted applicants to the Chapter
- ☐ Arrive 15 minutes early to the meeting
- ☐ Check on room/meeting setup
 - Appropriate signage at main entrances
 - Confirm Visitor Host & Member Resource Tables are set up
- ☐ Prepare for a successful meeting
 - Business Cards set up
 - Print blank PALMS Report from BNI Connect prior to each meeting for recording PALMS data at the meeting
 - BNI Weekly Chapter Meeting Agenda on table
 - Optional Door Prize at front of room
 - Member Success Kits ready to induct new Members
 - Purpose and Overview assigned to a Member
 - Assign Membership Committee member to give a complete Monthly Membership Committee Report
 - Assign Membership Committee member to provide the Referral Reality Check
 - Ensure all Membership Committee Specialists can fulfill this week's responsibilities. If not, re-assign or ensure tasks get completed.

DURING the Chapter Meeting Each Week

- ☐ Run the BNI Weekly Chapter Meeting Agenda if President is absent
- ☐ Provide a complete Vice President's Report
- ☐ Report on Chapter Goals

- ☐ Recognize Members using the Notable Networker Certificates or other awards
- ☐ Report average number of monthly referrals and visitors, referrals passed last month, and total number of referrals to date
- ☐ Report Thank You for Closed Business statistics for last month and to date
- ☐ Optional: Conduct the Door Prize Drawing
- ☐ Record Attendance (P=Present; A=Absent; L=Late or Leave Early; M=Medical Leave; S=Substitute)

AFTER the Chapter Meeting Each Week

- ☐ Participate in the Weekly Chapter Success Call with your Director (along with your President and Secretary/Treasurer)
- ☐ Conduct a brief Membership Committee Check-In
- ☐ Ensure Quality Assurance Specialist:
- ☐ Review new Membership Applications submitted
- ☐ Assign application due diligence responsibilities to Membership Committee Members
- ☐ Assign a completion date and conference call to discuss and vote
- ☐ Ensure Community Building Specialist:
- ☐ Call Members who have missed second, third and fourth meetings in a six-month period
- ☐ Encourage Members to invite visitors
- ☐ Maintain a top ten list of most wanted BNI Classifications filled
- ☐ Enter Chapter statistics in BNI Connect within two business days of your Chapter meeting

AS NEEDED

- ☐ Conduct One-to-Ones with new Members as part of the [Passport to Success Mentor Program](#)

MONTHLY

- ☐ Attend and facilitate the second half of the [Chapter Success Meeting](#)
- ☐ Attend monthly support and training opportunities as offered by the BNI Regional Office

REPORTS

- ☐ Complete Chapter Success Meeting and email to your Chapter Support Director or the Regional Office monthly
- ☐ Verify that the Secretary/Treasurer has made the appropriate and timely roster changes by communicating with the Regional Office or using the BNI Connect system, whichever is applicable for your region.

Taking Attendance

When taking attendance, we use the PALMS system: Present, Absent, Late, Medical/Leave and Substitute. It is important that the PALMS Report is completed in BNI Connect within two business days after every Chapter meeting. Printing out a blank PALMS Report before the meeting makes it easy to record this information at the meeting. Not entering PALMS in a timely manner can negatively affect your Chapter Traffic Lights Report and Power of One Report.

Membership Committee

Each Chapter must establish a Membership Committee. There should always be an odd number of members on this committee, including the Vice President. The Membership Committee is a volunteer service commitment that coincides with the Leadership Team's term. The Membership Committee is led by the Vice President, who is an equal voting member of the committee.

Membership Committee Specialists

Delegating the workload for Vice Presidents helps Membership Committee Members take more ownership and responsibility for the best interest of the entire Chapter. Please remember that while delegating these important roles/tasks to a Membership Committee Member, the Vice President of each Chapter is still responsible for making sure each task is completed in a timely manner. Assign one Membership Committee to each of these four roles:

- Community Building Specialist
- Quality Assurance Specialist
- Member Engagement Specialist
- Member Relations Specialist

Membership Committee Report*

This is a brief weekly report in the BNI Weekly Chapter Meeting Agenda regarding membership related Chapter matters. You may wish to report on any of the following items. Delegate a Membership Committee Member to deliver the report, and the Vice President approves the report in advance:

- Notify the Chapter when an individual is no longer a Member and when the category is opened. For example: "We currently have an opening for a financial planner."
- Remind Members of the value or importance of one of the membership policies or guidelines.
- Explain the roles of the Membership Committee and who is responsible for each. Ensure new Members are briefed on the Membership Committee's responsibilities.
- Allow a Mentor Program Report (contact your Chapter's Mentor Coordinator for more information).
- Give tips about how to find quality referrals or bring visitors. Explain that one referral or guest equals one unit of participation; every visitor represents a potential new customer for our Members!
- Provide direction or instruction on a special BNI program.
- *For online Chapters, this report can be given in the Celebrations section.

This information, although brief, is very important to a well-functioning Chapter. Successful Chapters exhibit keen and consistent administration. BNI Members appreciate being reminded and informed about how the Chapter operations are being administered.

Weekly Membership Committee Check-Ins

- 10- to 15-minute check-in at the end of each Chapter meeting
- Meetings are open only to the Vice President, Membership Committee members and the Director/Director Consultant
- Review new Membership Applications and assign responsibilities to process applications
- Discuss immediate Chapter issues that need to be addressed

Quality Assurance Specialist

The Membership Committee Quality Assurance Specialist ensures all new Members are high-quality business professionals and have a strategic fit (BNI Classification) within the Chapter before they are accepted into the Chapter.

Checklist of Responsibilities

To be on the Leadership Team, the Membership Committee Quality Assurance Specialist agrees to the following requirements:

- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

AS NEEDED

- ☐ Ensure all new Members are high-quality business professionals and have a strategic fit (BNI Classification) within the Chapter before being accepted for membership
- ☐ Identifies the level of due diligence needed for each new application
- ☐ Identifies and tracks Membership Committee assignments for new applications
- ☐ Keeps Vice President apprised of process

New Membership Application Review Process

Upon receiving an application, take the following steps to ensure the applicant is a high-quality business professional before accepting them as a Member.

Internet Search

Online Application Review

Reference Check

The Interview

Professional Classification

Internet Search

To maintain a high standard of applicants that are accepted into a BNI Chapter, please use the provided list of resources for the Membership Committee to conduct additional research for certain professions, as well as general resources for all businesses.

General Resources

- Member's Business Website
 - Is it professional?
 - Is it accurate and up to date?
 - Is it a good representation of their business?
- Google, www.google.com
 - What kudos, awards or achievements have they accomplished?
 - What other organizations are they involved in?
 - If negative information is found, please confirm with photo identification.
- Social Media Networks
 - What image is the applicant portraying on various social media networks?
 - Facebook, www.facebook.com
 - LinkedIn, www.linkedin.com
 - Twitter, www.twitter.com
- Better Business Bureau, <http://www.bbb.org/>
- Chambers of Commerce
- Secretary of State
- Licenses, Permits & Registrations

Industry Specific Resources

- Attorneys
 - [National Lawyer Regulatory Data Bank](#)
 - Select the Directory of Lawyer Disciplinary Agencies
- Building Contractors, General Contractors, Subcontractors
 - Search for local, state, national licenses
- Certified Public Accountants (CPAs)
 - [National Association of State Boards of Accountancy](#)
- Financial Planners
 - [Financial Industry Regulatory Authority](#)
- Insurance
 - Search for local, state, national licenses
- Medical/Health Professionals
 - Search for local, state, national licenses
- Mortgage
 - [National Mortgage Lenders Search](#)
- Real Estate Agents
 - Search for local, state, national licenses

Supplemental Resources

- Department of Motor Vehicles
 - May be used to verify licensing for industries that require a specific type of driver's license
- National Sex Offenders Public Registry
 - Lists registered sexual offenders by zip code; search by name
 - <http://www.nsopw.gov>

Notes

- All information gathering and research is done at the Membership Committee's discretion.
- If you find negative information regarding an applicant, it is imperative that you verify the relevancy with photo identification.
- Any fees incurred as a result of your research are the responsibility of the Chapter.
- Ultimately you will use your own judgment on what research you believe to be true and reasonable.

Online Application Review

The application can give the Membership Committee insight into the likelihood of success in the BNI Chapter for the applicant. Consider the following when reviewing the application:

1. **Personal Information:** The way the applicant's entire name, business name and address on their application is how their information will appear on their BNI Connect Member Profile and respective Chapter reports.
 - Website, Email, Business and Mobile: At first, no Member contact information is available on the regional website; Members will need to access their profile to indicate which information will be viewable. For the Leadership Team and BNI Regional Team to communicate with the Member, all boxes must be completed.
 - Industry and Special Instructions: The BNI Classification chosen by the applicant provided by BNI Connect. [Here is a link to the most current list of classifications.](#) These two sections need to be reviewed very carefully. If there are any potential overlaps, resolve prior to acceptance. If the applicant has a wide range of business activities, ensure that their application states clearly which single category they are applying to represent in the Chapter using the BNI Classification List. If the applicant's category has been revised to reflect BNI guidelines, correct this on the application and have the applicant initial to designate approval.
2. **Membership Term:** Applicants may choose between a 1-year and a 2-year term. Some regions may offer a 5-year term. They are also asked to indicate if Company paid, the name of the person or company paying the membership and whether or not they have a BNI Certificate of Credit.
3. **Experience & Credentials:** Is the applicant's experience and education relevant to the category in which they are applying?
 - **Experience and Length of time in BNI Classification:** Length of time in their industry is a key consideration. Are they well-established? Or are they green and newer to their business/industry? How well will they be able to bring referrals to the Chapter? How well will current Members be able to refer to them just based on how "new or seasoned" they are in their business?

- **Educational Background, Licenses, Credentials:** What is needed for their industry and professional classification? Can they provide the needed insurance, business license or other needed documents to practice in your state?
 - **Is the BNI Classification under which you are applying for membership your primary professional focus?** Reference Member Policy #2 ... “BNI Members must represent their primary professional focus.” Is the applicant able and willing to be available for business during normal operating business hours? Are they available to conduct One-to-Ones to build relationships that allow for the development of referrals? How committed are they to their business?
4. **Standard and Expectations:** This section allows us to set Member expectations up front! The more an applicant knows now, the more successful Member they will become!
- Are you able and willing to make the commitment to arrive at our weekly meetings on time and stay throughout the published time, attend the Member Success Program training and do you agree to abide by BNI Member Policies, Guidelines & Code of Ethics? This question helps to set the expectations of the new Member before they apply. By discussing these commitments to the applicant, they fully understand what they are getting into prior to being accepted as a Member.
 - Are you willing and able to send a substitute if you are unable to attend a meeting? This question creates conversation around the attendance policy and substitution guidelines. If they don't have someone in their company, help them to identify other potential candidates who would make great substitutes should the need arise, such as a client, co-worker, or business colleague.
 - Have you ever been a Member of a BNI Chapter? If yes, please provide details. Please remember that just because someone is a previous Member of BNI does not mean that they are a perfect fit for your Chapter. Each new applicant to YOUR Chapter must complete a new application. If they indicate that they are a previous Member, first, find out if it is an immediate transfer. If yes, please reference the Transferring Members section and the Request to Transfer Form. With both immediate transfers and previous Member due diligence is still warranted.
 - Do you belong to other networking organizations? If yes, please list. Do they belong to other networking organizations that are either complementary to or in competition with BNI? Complementary organizations include soft contact networks such as Chambers of Commerce or civic organizations such as Rotary, Kiwanis, Lions or Toastmasters where the purpose is public service and education. Organizations that have only one person per professional specialty and its purpose is to pass business are considered to dilute Members' referral efforts, and therefore would not be acceptable. Reference Member Policy #4 ... “An individual can only be a Member of one BNI Chapter. A Member cannot be in any other program that holds Members accountable to pass referrals.”
 - Have you ever been convicted of a felony? If they select yes, this DOES NOT preclude them from membership. As the Membership Committee reviewing this application, the only question that can be asked is “Would knowledge of this felony prohibit others from referring you?” With this information, the Membership Committee can either research further or continue with processing the application.
5. **Business References:** Look for two clients, customers, patients, or other people who can vouch for their professionalism and how they conduct themselves. As long as the applicant has permission to use their name and contact information as a reference, then the Membership Committee is permitted to call them. The applicant's signature on the bottom front of the application gives permission to contact the references listed.

Reference Check Questions

To assure the quality of new Members to our organization, the Membership Committee must check two business references that can vouch for the individual's business excellence.

1. How long have you known the applicant in a business capacity?
2. What is your business relationship with the applicant?
3. Overall, describe HOW the applicant conducts business in regard to their products or services offered?
4. Are you aware of any grievances by anyone regarding the products/services offered by the applicant?
5. Does the applicant keep and follow-up on commitments?
6. Would hire/work with the applicant again? Why?
7. Do you have anything to add on behalf of the applicant?

The Interview

Let's help to set the expectations of membership when interviewing an applicant. Keep in mind that this is just a place to start the conversation. You can add any questions you feel are pertinent or applicable to your Chapter's needs.

1. Why did you decide to apply to BNI, specifically our Chapter?
2. What would you say are the strengths you bring to BNI and our Chapter?
3. What do you expect to receive from BNI and from our Chapter?
4. Will the [7:00 am] start time pose any problems with your schedule? Are you able to stay for the full duration of the meeting each week?
5. BNI has a clearly defined attendance policy. I'd like to review it with you now, so you have a clear understanding of the policy. You are allowed up to three absences within a rolling six-month period. If you have four absences during that time, you may be asked to leave the Chapter. If you have a substitute, you are not considered absent. A substitute does not have to be from your office/business. They can be anyone who is willing to attend the meeting and speak on your behalf at the meeting as long as they are not a Member of your chapter. Do you have questions about this attendance policy? Are you willing and able to commit to this?
6. If you cannot attend a meeting, will you be able to have a substitute present?
7. Annually, our Chapter holds a special event that focuses on increasing referrals for our Members. Are you willing to send invitations to people you believe would benefit from an increase in referrals? [Mandatory for new forming Chapters and Chapters that have an upcoming Visitors' Day.]
8. In reviewing your application, we want to make sure we understand what niche you will be representing in our Chapter. What specific products and services do you offer in your industry? Is there an area in which you specialize?
9. Is a license required to practice your profession in this state (or any neighboring states)? If so, what is your license number? Are you also bonded and insured, if required for your profession?
10. What do you like most about what you do regarding your profession?
11. Have you ever applied to another BNI Chapter? What was your experience?



12. Do you belong to other networking organizations? What was your experience? Do you understand BNI's Policy of not belonging to other programs that hold members accountable to pass referrals?
13. All new Members are asked to complete Member Success Program prior to doing their Feature Presentation, ideally within the first 60 days of membership. This will be assigned to you to complete online. Will you be able to complete it?
14. All Members participate in our Passport to Success Mentor Program. Are you willing to dedicate time outside the weekly meeting to conduct One-to-Ones with your fellow Members as part of this business building activity?
15. In the next six to 12 months, you will be asked to be in a leadership role. Are you willing to consider which role may be appropriate for you and step into a leadership role when the time comes?
16. Are you aware that this Chapter has additional dues to cover our venue/meal/coffee? The amount is \$____ per week/month/quarter and it is payable to the Secretary/Treasurer upon acceptance of your Membership Application.
17. You may have noticed on your application that upon your acceptance to BNI, fees are non-refundable without exception. Your application has not yet been accepted. Is there any part of the application review process that has made you become aware that this organization may not be a good fit for you or your business?
18. What reservations do you have about membership in BNI?
19. Do you have any questions for me about BNI or our Chapter?

"Please let your references know that we will be calling them. This helps to expedite the application process. Thank you for your time today. The Membership Committee will let you know the status of your application before the next meeting."

Selecting the BNI Classification

Advertising & Marketing

- ☐ Advertising Agency
- ☐ Branding
- ☐ Copywriter/Writer
- ☐ Digital Marketing
- ☐ Embroidery
- ☐ Graphic Designer
- ☐ Marketing Consultant
- ☐ Media Services
- ☐ Photographer
- ☐ Photographer Commercial
- ☐ Print Advertising
- ☐ Printer
- ☐ Printer Digital
- ☐ Printer Large Format
- ☐ Printer Offset
- ☐ Promotional Products
- ☐ Public Relations
- ☐ Publisher
- ☐ Radio Advertising
- ☐ Relationship Marketing
- ☐ Search Engine Optimization
- ☐ Sign Company
- ☐ Social Media
- ☐ Television Advertising
- ☐ Videographer/Film Producer
- ☐ Web Design
- ☐ Web Development
- ☐ Specialist: _____

Agriculture

- ☐ Agronomist
- ☐ Specialist: _____

Animals

- ☐ Aquarium/Fish
- ☐ Boarding
- ☐ Dog Trainer
- ☐ Grooming
- ☐ Pet Foods
- ☐ Veterinarian
- ☐ Specialist: _____

Architecture & Engineering

- ☐ Architect
- ☐ Architectural Services
- ☐ Architecture & Engineering
- ☐ Civil / Structural Engineer
- ☐ Feng Shui
- ☐ Garden & Landscape Architect
- ☐ Interior Architecture

- ☐ Landscape Services
- ☐ Lawn Care
- ☐ Surveyor
- ☐ Tree Services
- ☐ Vaastu Architecture
- ☐ Specialist: _____

Art & Entertainment

- ☐ Artist
- ☐ Disc Jockey (DJ)
- ☐ Entertainer
- ☐ Musicians
- ☐ Specialist: _____

Car & Motorcycle

- ☐ Auto Glass
- ☐ Auto/Car Body Shop
- ☐ Auto/Car Detailing
- ☐ Auto/Car Parts & Accessories
- ☐ Auto/Car Rental/Leasing
- ☐ Auto/Car Repair
- ☐ Auto/Car Sales
- ☐ Commercial Vehicle Dealers
- ☐ Driving Instructor
- ☐ Gas Station
- ☐ Tire Sales/Replacement
- ☐ Specialist: _____

Computer & Programming

- ☐ App Developer
- ☐ Cloud Services
- ☐ Computer Programming (Other)
- ☐ Computer Retailer
- ☐ Computer Software
- ☐ Computer Training
- ☐ Data Security
- ☐ ERP Software
- ☐ IT & Networks
- ☐ IT Consultants
- ☐ Programmer
- ☐ Specialist: _____

Construction

- ☐ Balcony/Veranda
- ☐ Blacksmith
- ☐ Bricklayer/Stonemason
- ☐ Builder/General Contractor
- ☐ Cabinet Maker
- ☐ Carpenter
- ☐ Cement/Concrete
- ☐ Commercial Builder

- ☐
- ☐ Construction Project Management
- ☐ Counter Tops
- ☐ Demolition Contractor
- ☐ Drainage
- ☐ Drywall
- ☐ Electrician
- ☐ Electrician Commercial
- ☐ Elevators
- ☐ Energy Services
- ☐ Environmental Services
- ☐ Fences
- ☐ Fireplace & Oven Builder
- ☐ Flooring
- ☐ Garage Doors
- ☐ Glass
- ☐ Ground Works
- ☐ Handyman
- ☐ Heating Engineer
- ☐ HVAC - Heating & Air
- ☐ Interior Design
- ☐ Interior Design Commercial
- ☐ Kitchen Construction
- ☐ Metal Work
- ☐ Painter & Decorator
- ☐ Pest Control
- ☐ Plasterer
- ☐ Plumbing
- ☐ Pools, Spas & Saunas
- ☐ Power Generator
- ☐ Power Washing
- ☐ Protective Coatings/Sealants
- ☐ Renovations/Remodeling
- ☐ Restoration
- ☐ Roofing & Gutters
- ☐ Septic Systems
- ☐ Shutters & Awnings
- ☐ Single House Builder
- ☐ Solar
- ☐ Tile Worker
- ☐ Waterproofing/Weatherproofing
- ☐ Window Treatments
- ☐ Windows & Doors
- ☐ Specialist: _____

Consulting

- ☐ Business Advisor
- ☐ Business Broker
- ☐ Business Consultant
- ☐ Business Consultant Management
- ☐ Business Consultant Organization & Process
- ☐ Business Consultant Quality Management
- ☐ Business Consultant Small Business
- ☐ Business Consultant Turnaround
- ☐ Diversity, Equity & Inclusion
- ☐ Energy Consulting
- ☐ Professional Organizer
- ☐ Specialist: _____

Employment Activities

- ☐ Administrative Services
- ☐ Employment Agency
- ☐ Employment Law Consultant
- ☐ Human Resources
- ☐ Recruiter
- ☐ Virtual Assistant
- ☐ Specialist: _____

Event & Business Service

- ☐ Call Center/Answering Service
- ☐ Corporate Events
- ☐ Event Manager/Marketer
- ☐ Event Planner
- ☐ Event Rentals
- ☐ Event Venue/Room Rental
- ☐ Events
- ☐ Hotel
- ☐ Office Services
- ☐ Technicians - Audio, Video
- ☐ Translator/Language Services
- ☐ Specialist: _____

Finance & Insurance

- ☐ Asset Finance
- ☐ Banking Services
- ☐ Business Financing
- ☐ Collections
- ☐ Commercial Bank Services
- ☐ Commercial Insurance
- ☐ Commercial Loans
- ☐ Company Secretary
- ☐ Credit Card/Merchant Services
- ☐ Credit Repair

- ☐ Financial Advisor
- ☐ Financial Investments
- ☐ Financial Trustee
- ☐ Foreign Exchange
- ☐ Group Benefits
- ☐ Health Insurance
- ☐ Insolvency Practitioner
- ☐ Insurance Adjuster
- ☐ Insurance Broker
- ☐ Life & Disability Insurance
- ☐ Mutual Funds
- ☐ Pensions
- ☐ Property & Casualty Insurance
- ☐ Property Construction Loan
- ☐ Residential Mortgages
- ☐ Reverse Mortgages
- ☐ Stockbroker
- ☐ Supplemental Insurance
- ☐ Wealth Management
- ☐ Specialist: _____

Food & Beverage

- ☐ Baker
- ☐ Beverage Service
- ☐ Cater
- ☐ Food Service
- ☐ Restaurant
- ☐ Wine Merchant/Wine
- ☐ Specialist: _____

Health & Wellness

- ☐ Acupuncture
- ☐ Alternative Wellness
- ☐ Chiropractor
- ☐ Counselor/Psychotherapist
- ☐ Doctor/Physician
- ☐ Essential Oils
- ☐ General Dentist
- ☐ Health & Wellness Products
- ☐ Health & Wellness Services
- ☐ Health Coach
- ☐ Health Facility/Gym/Club
- ☐ Hearing/Audiology
- ☐ Hospice
- ☐ Hypnotherapist
- ☐ In-Home Care
- ☐ Massage Therapist
- ☐ Medical Services
- ☐ Naturopaths
- ☐ Nutritional Supplements
- ☐ Nutritionist
- ☐ Optician/Eye Care
- ☐ Orthodontist

- ☐ Osteopath
- ☐ Personal Trainer - Fitness
- ☐ Pharmacist
- ☐ Physical Therapist
- ☐ Sophrologist
- ☐ Specialist: _____

Legal & Accounting

- ☐ Accounting Services
- ☐ Auditor
- ☐ Bankruptcy Law
- ☐ Bookkeeping
- ☐ Business Law
- ☐ Certified Public Accountant (CPA)
- ☐ Company Formation
- ☐ Conveyancing
- ☐ Criminal Defense Law
- ☐ Elder Law
- ☐ Employment/Labor Law
- ☐ Estate Planning Law
- ☐ Family Law
- ☐ Government Services
- ☐ Health Law
- ☐ Immigration Law
- ☐ Intellectual Property Law
- ☐ Law Enforcement Officer
- ☐ Legal Service Plan
- ☐ Litigation
- ☐ Mediator
- ☐ Notary
- ☐ Offshore Company Set Up
- ☐ Payroll Service
- ☐ Personal Injury Law
- ☐ Real Estate Law
- ☐ Tax Advisor
- ☐ Tax Law
- ☐ Wills & Trusts
- ☐ Specialist: _____

Manufacturing

- ☐ Apparel
- ☐ Basic Metals
- ☐ Beverages
- ☐ Chemical Products
- ☐ Computer, Electronics & Optical
- ☐ Flooring Manufacture
- ☐ Food Products
- ☐ Furniture Manufacture
- ☐ Leather Products
- ☐ Lighting Manufacture
- ☐ Machinery & Equipment
- ☐ Motor Vehicles

- ☐ Non-Metallic Minerals
- ☐ **Manufacturing Continued**
- ☐ Packaging
- ☐ Paint Manufacture
- ☐ Paper & Paper Products
- ☐ Petroleum Products
- ☐ Pharmaceutical
- ☐ Recorded Media
- ☐ Rubber & Plastic
- ☐ Steel Fabrication
- ☐ Textiles
- ☐ Tobacco Products
- ☐ Transportation Equipment
- ☐ Wood & Cork
- ☐ Specialist: _____

Organizations & Others

- ☐ Chambers/Associations
- ☐ Givers Gain®
- ☐ Non-Profits/Fundraising Organizations
- ☐ Specialist: _____

Personal Services

- ☐ Astrologist
- ☐ Color & Style Consultant
- ☐ Cosmetics/Skin Care
- ☐ Dry Cleaning/Laundry
- ☐ Funeral Planning/Services
- ☐ Hair Stylist
- ☐ Salon/Spa
- ☐ Senior Service Provider
- ☐ Wedding Planner
- ☐ Specialist: _____

Real Estate Services

- ☐ Apartment Administrator
- ☐ Buying Agent
- ☐ Carpet, Upholstery Cleaner
- ☐ Cleaning Service
- ☐ Commercial Cleaning
- ☐ Commercial Real Estate
- ☐ Electricity & Gas Dealers
- ☐ Home Inspection
- ☐ Home Staging
- ☐ Property Management
- ☐ Real Estate Appraisal
- ☐ Real Estate Development
- ☐ Real Estate Inspector
- ☐ Real Estate Investments
- ☐ Real Estate Maintenance/Caretaker
- ☐ Real Estate Planning Consultant
- ☐ Real Estate Rentals

- ☐ Real Estate Tax Exemption
- ☐ Residential Real Estate Agent
- ☐ Title Services
- ☐ Waste Disposal
- ☐ Window Cleaning
- ☐ Specialist: _____

Repair

- ☐ Appliance Repair
- ☐ Computer Repair
- ☐ Furniture Repair/Upholstery
- ☐ Machinery & Equipment Repair
- ☐ Specialist: _____

Retail

- ☐ Appliances
- ☐ Art Dealer/Gallery Owner
- ☐ Bath Accessories
- ☐ Book Dealers
- ☐ Building Materials
- ☐ Cleaning Products
- ☐ Clothing & Accessories Retailer
- ☐ Computer Accessories
- ☐ Construction Products
- ☐ Custom Clothing/Tailor
- ☐ Diamonds
- ☐ Doors Retail
- ☐ Electrical Equipment
- ☐ Electronics Retailer
- ☐ Environmental Products
- ☐ Fashion Jewelry
- ☐ Fine Jewelry
- ☐ Florist
- ☐ Fuels
- ☐ Furniture Retailer
- ☐ Gifts
- ☐ Home Furnishings
- ☐ Home Theaters
- ☐ Lighting Retailers
- ☐ Mattresses
- ☐ Office Equipment/Machines
- ☐ Office Furniture
- ☐ Office Supplies
- ☐ Paint Retailer
- ☐ Sports Retailer
- ☐ Tiles
- ☐ Uniforms
- ☐ UPS/Inverter
- ☐ Wall Coverings
- ☐ Water Systems
- ☐ Wood Merchants
- ☐ Specialist: _____

Security & Investigation

- ☐ CCTV
- ☐ Fire Protection
- ☐ Investigative Services/Detective
- ☐ Locksmith
- ☐ Occupational Safety
- ☐ Security Personnel
- ☐ Security Systems
- ☐ Specialist: _____

Sports & Leisure

- ☐ Martial Arts
- ☐ Yoga/Pilates/Qi-gong Trainer
- ☐ Specialist: _____

Telecommunications

- ☐ Mobile Telecommunications
- ☐ Telecommunications Products/Services
- ☐ Specialist: _____

Training & Coaching

- ☐ Business Training/Coach
- ☐ Communication Coach
- ☐ Education Services/Tutor
- ☐ Leadership Coach
- ☐ Learning Centre
- ☐ Life Coach
- ☐ Management Coach
- ☐ Sales Training/Coach
- ☐ Specialist: _____

Transport & Shipping

- ☐ Commercial Transport
- ☐ Courier
- ☐ Freight Service
- ☐ Mailing Service
- ☐ Moving Company
- ☐ Shuttle/Limousine Service
- ☐ Specialist: _____

Travel

- ☐ Ticketing
- ☐ Tours/Tour Guide
- ☐ Travel Agent
- ☐ Specialist

Reasons to Decline an Application

The following are several suggested guidelines for declining an application. This list is not meant to be either exhaustive or binding.

1. There is an unacceptable overlap in BNI Classification between a prospective Member and a current Member (as determined by the Membership Committee).
2. The profession of the prospective Member listed on the application is not his/her primary focus.
3. One or more objections have been filed by Members regarding the prospective Member's type of service, quality of product or service, business ethics or professionalism.
4. The prospective Member does not possess the proper credentials for his/her profession (where applicable), i.e., required licensing or other certification.
5. The prospective Member is also a Member of another competing organization that has only one person per profession and its primary goal is to pass referrals.
6. The prospective Member provided incomplete or inaccurate information on the membership application, i.e., no references or failed to answer the questions listed.
7. The prospective Member is unable to service and/or provide referrals in the community where the Chapter is located.
8. Poor attitude; wrong dynamics for the Chapter.

Transferring Members

The strength of BNI is in the relationships that we build. Those relationships take time and commitment to one another to build and maintain. When someone joins a Chapter, they make a commitment to the Chapter and its Members. That commitment should be taken very seriously both by the Membership Committee and the applicant.

On occasion that commitment changes and a person may need or want to transfer to a different Chapter. Reasons for transferring include relocating to another city, territory has been reassigned, or changing jobs to a new classification that is filled in the current Chapter. The transfer process is a 2- to 3-week process.

A Member requesting a transfer from their current Chapter to a new Chapter will be required to submit a completed new Member application to the Membership Committee of the new Chapter. In addition, if the Member has less than 6 months of paid membership credit, they must submit a renewal payment. Or, if the Member has more than 6 months of paid membership credit, no additional investment is required. Upon acceptance into the new Chapter, the credit from their previous Chapter will be added to their membership in the new Chapter as well as the renewal time, if applicable.

If a Member of another Chapter approaches your Chapter about transferring, please contact your Director/Director Consultant so that he/she can walk you through the process. The Member can get started with the transfer process.

Member Engagement Specialist

The Membership Committee Member Engagement Specialist focuses on creating a game plan for Members who need additional support to be successful and ensures all renewals are approved/declined in a timely manner.

Checklist of Responsibilities

To be on the Leadership Team, the Membership Committee Member Engagement Specialist agrees to the following requirements:

- ☐ Submit signed Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

ONGOING

- ☐ Keeps track of upcoming Seven-Month Check-Ins
- ☐ Assigns Seven-Month Check-In to a Membership Committee member
- ☐ Supports Members in the online renewal process in BNI Connect
- ☐ Review the Member Traffic Lights based on the Power of One to identify the three Members who need support and coaching
- ☐ Perform Coaching Moments as needed

The Seven-Month Check-In

The Goal of the Seven-Month Check-In is to:

- Provide clarity for the Member about their development in the Chapter from a personal point of view and from the point of view of the Membership Committee
- Clarity for the Member about their strengths and development potential
- Outlining the corrective changes before the membership renewal date (if applicable)
- Terms and conditions for membership renewal are clarified
- Increased the renewal rate in your Chapter

The Seven-Month Check-In Process includes:

1. Discussion of the Members that are due to renew in the following six months in the monthly Chapter Success Meeting:
 - Membership Committee determines strengths and development potential based on the PALMS Report, Member Training Report and observable attitude and performance.
 - If needed, the Membership Committee appoints a mentor to support the needed development of the Member.
 - The comments of the Membership Committee are the basis for discussion and will be noted in the Seven-Month Check-In Form.
 - A member of the Membership Committee who has good rapport with the Member is going to conduct the feedback session.
2. Setting a date for the One-to-One with the Member – The Membership Committee member forwards the Member Traffic Lights based on the Power of One to the Member before the conversation.

3. Questions during the conversation

- How are you feeling in the Chapter?
- How would you evaluate your benefits from your BNI membership?
- To what extent have you reached your goals concerning GIVING and RECEIVING in the last six months?
- Discussion of the comments of the Membership Committee (see above)! Possible suggestion of a mentor.
- What suggestions do you have?
- What other topics you would like to discuss?
- Final question: If you had to decide today whether you will apply for your membership to be renewed, what is the likelihood (in %) that you will renew?

4. At the Chapter Success Meeting, the Membership Committee member gives a brief report about the results of the discussion for the other Members. From this discussion, the following can be discussed:

- Creating a game plan to incorporate feedback and other action items from the feedback
- Decide if the Member should be put on probation for performance for the remaining time of his/her membership
- Decide if the Member should be declined upon the next renewal

Perform Coaching Moments

BNI has adopted the GROW coaching model to help Members develop and improve. GROW stands for **G**oal, **R**eality, **O**ptions and **W**ay Forward. Below are some questions that can be used as you coach a Member.

GOAL – What are the goals set forth by the Chapter and why.

- What does the Chapter need from the Member?
- Why is change necessary by the Member to meet the goals that have been set?
- What does the Member want?
- What will accomplishing the goals get the Member?
- What does success look like?

REALITY – How is the Member performing today?

- How are things going right now?
- What is wrong with performance/goal attainment today?
- How do you feel?
- What barriers do you face in meeting goals?
- Is the Member resistant to change?

OPTIONS – What plan can be set in place going forward for the Member to succeed and meet the goals of the Chapter?

- What are the options? Mentoring? Training?
- What are some ways you can approach the issue and improve?
- What are some of the advantages and disadvantages of each option?
- What will happen if change doesn't happen?

WAY FORWARD – How will the Member proceed on their path to improving?

- What option is your best choice?
- When will you get started? What is the first step of action?
- What else do you need to do?
- On a scale of 1-10 (10 being high), how committed are you to this plan?
- What would it take you to be a ten?
- What accountability structures would help you?
- How will we celebrate the success?

Community Building Specialist

The Membership Committee Community Building Specialist maintains and communicates growth initiatives including the top 10 list of most wanted BNI Classifications and calling any Members who need support around attendance.

Checklist of Responsibilities

To be on the Leadership Team, the Membership Committee Community Building Specialist agrees to the following requirements:

- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

As Needed

- ☐ Identify and communicate the top ten BNI Classifications wanted in the Chapter.
- ☐ Consistently educate Members on importance of the attendance policy to the success of the Chapter.
- ☐ Uphold the attendance policy by making phone calls to Members who were absent each week.
- ☐ Get approval from Vice President and Executive Director/Director Consultant prior to sending the Open Classification Letter and making the fourth absence phone call – timing is very important!

Identify & Communicate the Top Ten BNI Classifications

The most successful Members are typically in the most balanced Chapters. Did you know that if we could build Chapters with eight Members in each of the six major Contact Spheres, Chapters would be 48 thriving Members? Fifty to sixty percent of your referrals come from people in your Contact Sphere.

The best way to identify what classifications are needed in the Chapter is to examine the existing Members by contact sphere. To do this easily and effectively, follow the steps outlined below.

1. Using the resource, Contact Sphere List 8 in 6 found in the Resources section of BNI Business Builder, fill in the names of the Members holding that classification/specialty*. This shows how many Members exist in each Contact Sphere to understand your starting point.
*Classifications/specialties were developed using the number of Members in each category globally. If the classifications need to be edited for your Chapter, you may take the PowerPoint version from BNI Business Builder of the document and edit the classifications.
2. Start creating the top ten list by looking at Contact Spheres that have one or two Members in them. It is important to start supporting your existing Members before you start building a Contact Sphere that doesn't exist in the Chapter.
3. Then focus on building each Contact Sphere equally. Use stack days or theme days discussed in the "Encourage Members to Invite Visitors" course to build out each Contact Sphere. The goal is to get at least eight Members into each of the major Contact Spheres.
4. As the Chapter grows, consider adding Contact Spheres not represented on this list as they are identified by Members.

Implementing the Attendance Policy

Attendance is one of the most critical aspects of BNI. If a Member is not in attendance at your meeting, how can they learn what it is you need to build your business? And how will you be able to help them build their business if they are not there to educate and train you? Experience has shown that the more successful Chapters have very good attendance and the less successful Chapters have poor attendance. The BNI attendance policy is:

BNI General Policy #5: "A BNI Member is allowed three absences within a continuous six-month period. If a Member cannot attend, they may send a substitute; this will not count as an absence."

When a Member misses a meeting, an automated email is sent (based on PALMS submission) as a courtesy. In addition, when a Member loses an absence over time, a congratulatory email is sent. A Member may be terminated by letter after their fourth absence within any six-month period. If you do not follow this policy, it will weaken your Chapter! If seeking to open a Member's classification, the Membership Committee must have written approval from the Executive Director. The Director for the Chapter will work with the Chapter to obtain approval from the Executive Director.

To build the community through the attendance policy, it is recommended the Community Building Specialists make a phone call after the second and third absence and before the fourth absence in which the Member's seat is opened. Each call should include: "We missed you today! Is everything okay? What can we do to help? We value your participation in the Chapter!"

Substitutes

Remind the Members that a substitute is a great solution to staying within the attendance policy. Potential substitutes include customers, friends, family, and/or employees. Help the Member identify one or two substitutes they can use in the event they must miss a meeting. Keep in mind the absences are for last-minute situations. Substitutes are for planned absences. It is a best practice to alert the Chapter of a substitute so that the Visitor Host can be there to greet them.

Late/Leaving Early

To build meaningful relationships, reliability is very important and is supported by policy #3, "BNI Members must arrive on time and stay for the entire published meeting time".



The Membership Committee tracks and coaches Members who are consistently late and/or leave early. Use the Absence Report from BNI Connect each week to review attendance and timekeeping records and do any necessary coaching with Members needing additional support. Waiting until the monthly Chapter Success Meeting to act may lead to a missed opportunity to retain a Member.

Certificate of Credit

If a Member is unable to continue attending their Chapter meetings for an extended period of time, a credit will be issued by the local BNI Director/Director Consultant. The credit is for the unused portion of a Member's membership, providing that Member is leaving the Chapter in good standing, e.g. he/she has not been asked to leave the Chapter for breach of any of BNI's policies, such as attendance, etc.

The Certificate of Credit is held in BNI Connect and a physical certificate will not be issued.

In the event that a Member cannot get back into their original Chapter because their former position is no longer available in that Chapter, the credit will be accepted as payment to join any other Chapter where there is an opening and the Membership Committee has accepted the Membership Application. It is not necessary to pay another registration fee when joining a Chapter this way. Credit can also be issued if a Member is relocating his/her business. Please note that a credit will never be issued to facilitate a transfer to a nearby Chapter.

When you receive a request for a Certificate of Credit, please contact your Director/Director Consultant to walk you through the process.

Leave of Absence

Legitimate personal leaves of absence are allowed by BNI General Policy #9.

The BNI Leave of Absence Policy states:

BNI General Policy #9: "Leaves of absence are possible for certain extenuating circumstances (e.g., extended medical issue that prevents member from working) at the discretion of the Membership Committee.

Leave can be used for personal health and family members if the Member is the primary caregiver. However, no two medical situations are alike, and there are extenuating circumstances beyond a medical condition that might warrant a leave of absence. The Membership Committee should collaborate with the Member and decide what is best for the Chapter and the Member requesting the leave.

Questions that should be asked when a person requests leave:

1. **How long do you need to be away?** A Member may take up to eight weeks leave of absence with the Membership Committee's prior approval if their participation fees are pre-paid for the period of time. The Vice President mark them "M" in the PALMS report weekly. The Member should notify the Membership Committee as soon as they are aware of the need to receive leave of absence.

2. **Are you keeping your business open?** If the answer is no, and it is the best option under the circumstances for the Member and the Chapter, then a Certificate of Credit may be issued for the unused time. Let the Member know you really want them back in the Chapter when the time is right. Offer to call them if someone in their BNI Classification visits and is interested in joining. The Member can always come back and apply if they are well enough to do so.

3. **If the Member is keeping their business open, who is going to be running their business? Could they substitute for them?** If they provide a substitute, list the attendance as 'M' for Medical/Leave not as an "S" for Substitute. Alternatively, ask if that person could assume

the role of BNI Member in the current Member's absence. Fees cannot be transferred from one person to another unless the fees are from the same company.

Compassion should be used in any medical situation impacting Members. Membership Committee should consider how the absence is going to impact the other Members in the Chapter. They should also consider how important that classification is to the Chapter. Work to find a win-win-win between the Member requesting leave, the individual Members impacted by the Member's absence and the Chapter's overall performance.

When you receive a request for medical leave, please contact your Director/Director Consultant to walk you through the process.

Member Relations Specialist

The Membership Committee Member Relations Specialist handles any constructive facilitation between Members as needed and identifies any leading indicators that might cause concern. Resolving issues, complaints, or disputes involving BNI Members is one of the jobs of the Member Relations Specialist. In BNI's experience, the below procedures set forth the best practices in most situations. However, there may be circumstances that require deviation from these procedures, and BNI, the Leadership Team, ought to use their professional judgment in determining the appropriate course of action in any given situation.

Checklist of Responsibilities

To be on the Leadership Team, the Membership Committee Member Relations Specialist agrees to the following requirements:

- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

As Needed

- ☐ Receives incoming concerns and complaints, verbal and written
- ☐ Contacts Vice President and Director/Director Consultant as soon as a written complaint is submitted
- ☐ Helps make arrangements to follow the process when a written complaint is in process using [Member Complaint Processing Checklist](#)
- ☐ Helps coach or arranges for a mentor or other Membership Committee Member to coach Members as needed using the GROW Coaching Model
- ☐ Brings Member Complaint Processing Checklist to monthly [Chapter Success Meeting](#), when a complaint is in process

BNI Classification Concerns

Members agree to only represent the one BNI classification approved by the Membership Committee. BNI Policy #1 states, "Only one person from each BNI classification can join a chapter of BNI®. Each Member can only hold one classification in a BNI Chapter."

One of the most common concerns that can often lead to a complaint is BNI classification creep. BNI Classification creep usually starts with a simple mention of another classification in the Weekly

Presentation and can lead to a Member being resented by other Members or trying to block a Visitor from joining because they claim ownership of multiple classifications.

Members of BNi® who represent multi-level marketing organizations should represent their products and services in BNi® and not the business opportunity element of their business. This keeps them from overlapping with people in the employment BNi® classifications.

Evaluating Member Complaints

When the Membership Committee observes conflicts, inappropriate behavior or receives a written complaint about a Member, the Membership Committee should take action. In most cases, the following steps should be followed when evaluating a Member complaint whether submitted by a Member in writing or as a result of Membership Committee first-hand experience.

Most complaints are the result of miscommunication or misunderstanding. First, encourage the Member with the complaint to try to work it out with the other Member. Encourage a One-to-One to open the lines of communication, share their concerns and clear up the misunderstanding. If this does not clear up the misunderstanding, or the Member is unable or unwilling to work it out, the Membership Committee must follow the complaint process:

1. One or more Members submit complaints in writing to the Membership Committee or Membership Committee acts on first-hand experience.
2. Vice President contacts the Director/Director Consultant for support PRIOR to proceeding.
3. Membership Committee interviews both parties involved
 - Each party is interviewed individually
 - Interview the person filing the complaint to find out missing information
 - Interview the Member at issue to allow them to give their version of the story
 - One or two Membership Committee members interview each party
 - Take notes and document the conversations (date, key points, Member's reactions)
 - Complaint letters are **not** shown to parties at issue, however key points may be shared
4. When possible, full Membership Committee, including the Vice President, meets to discuss the interviews
 - Determine if there is a violation in a BNi Policy or Code of Ethics
 - Determine severity of the violation
5. Determine a Resolution
 - Decision is made by majority vote of a complete and fully trained Membership Committee. The goal is to seek consensus of a resolution that is in the best interest of the Chapter.
 - Contact involved Members to notify them of the outcome/resolution.
 - If the Membership Committee is seeking Probation, the Membership Committee should have written approval from the Director that the process has been followed.
 - If seeking to open a Member's classification, the Membership Committee must have written approval from the Executive Director. The Director for the Chapter will work with the Chapter to obtain approval from the Executive Director.
 - After the appropriate approvals are received, contact the Member who filed the Complaint to advise that the review is complete.

- After the appropriate approvals are received, contact the Member who the Complaint was filed against to advise of the decision/outcome.

Dispute Resolution Options

The Membership Committee has the discretion to conclude a variety of dispute resolution options are available, ranging from nothing to opening the member's classification.

Coaching

1. Ask, "How can we help you resolve this issue?" and get the parties involved in coming to a resolution.
2. If the concern at hand is a Chapter-wide topic, encourage the Education Coordinator to address it through a Networking Education Moment.
3. Encourage the Member's Mentor to have a One-to-One and work with them on a specific area.
4. Assign appropriate BNI Business Builder coursework for completion by Member.
5. If the concern at hand is a Chapter-wide topic, ask the Director/Director Consultant to conduct a Feature Presentation to address the issue.

Probation (See Progressive Coaching Program)

1. Only a majority vote is needed from the Membership Committee (including the Vice President) to pursue probation; however, attempt to seek consensus.
2. Confirmation from the Director/Director Consultant that the process was followed is required.
3. Length of probation time is determined by the Membership Committee.
4. Use the appropriate [BNI Accountability Letter](#)
 - Add Member's name, date, Code of Ethics or Policy violation reference, and length of probation
 - No other details are to be added
 - Email the letter with a read receipt if possible
5. Ideally two Membership Committee members meet(s) with the challenged Member.
 - Explain reasons for probation
 - Provide an example of the types of behaviors that could be considered a violation of probation and result in opening the classification to another qualified professional
 - Measurable courses of action that allow for accountability, such as retaking the Member Success Program or bringing a certain number or qualified referrals or visitors, are to be addressed in this conversation
 - Vice President documents this conversation for Chapter records
6. If, at the end of the probation, the problem has not been rectified, the Membership Committee meet to consider opening the classification. Always involve and get approval from your Director/Director Consultant that the process was followed PRIOR to opening a Member's classification.

Open Classification

1. The Membership Committee may open the Member's classification without first imposing any other lesser disciplinary measure, such as sending an Accountability Letter or placing a Member

on probation, if warranted. Always involve and get approval from your Director/Director Consultant that the process was followed PRIOR to opening a Member's classification.

If the Membership Committee determines that a Member is too toxic for the Chapter or the Member has lost credibility and referability to have further success in the Chapter, they may open the Member's classification to a more qualified reliable professional, with the Executive Director's written approval.

2. Use appropriate BNI Accountability Letter

- Add Member's name, date, and Code of Ethics or Policy violation reference
- No other details are to be added
- Email the letter with a read receipt if possible.

3. One Membership Committee Member calls the Member to notify them and briefly explain the decision.

In the event a dispute arises involving a Membership Committee member, the Member will be removed from their duties during the dispute. The Vice President may call on other Members as deemed necessary.

Member Complaint Processing Checklist

Use the following checklist in evaluating a Member's complaint, in the order each item appears below. Initial and date each item as they are completed. Once complete, submit a copy to the BNI Regional Office. [Fillable Complaint Processing Checklist form](#) found on the BNI Business Builder under Resources.

1. Make Sure the Complaint Is:

- ☐ In Writing, when possible
- ☐ Based on Firsthand Experience
- ☐ From a BNI Member (this Chapter or any other)

2. Contact your Director prior to proceeding with the complaint process

3. Assign a Fully Trained Membership Committee

4. Vice President Assigns Two Membership Committee Members to Interview:

- ☐ The party who filed the complaint
- ☐ The party against who the complaint is filed

5. Meet to Discuss the Findings

The full Membership Committee meets to discuss the findings. Was there a violation of the BNI Policies or BNI Code of Ethics? Determine the appropriate course of action toward a resolution.

- ☐ Coaching
- ☐ Probation
- ☐ Open Classification

6. Conduct a meeting with your Director to notify the Director of the findings and discuss the Membership Committee's process for handling the complaint.

7. Obtain Appropriate Approvals for Course of Action

- ☐ Probation – Written approval from the Executive Director that the process was followed.

- ❑ Opening the Classification – Written approval from the Executive Director that the process was followed.

8. Issue the Appropriate BNI Accountability Letter

Create the appropriate BNI Accountability Letter; Have Director/Director Consultant approve prior to emailing with a read receipt, when possible.

9. Notify Both Parties of the Decisions

Accountability Letters

- Accountability Letters can be downloaded in Word form documents from BNI Business Builder.
- These letters must be sent out fairly and consistently to all Members, without exceptions.
- Do not alter the BNI Accountability Letters. They have been approved by BNI attorneys.
- Date the letter; use the date in which it will be sent.
 - Always sign the letters from “The Membership Committee”; never use an individual name.
- Always get your Executive Director’s written approval prior to sending an Open Classification or Probation letter.
- In all cases, these letters should be emailed to your Director/Director Consultant and the BNI Regional Office at the time it is sent to the applicant/Member.

Timing Is Everything!

When a Member misses a meeting, an automated email is sent (based on PALMS submission) as a courtesy. In addition, when a Member loses an absence over time, a congratulatory email is sent. It is imperative the Vice President submits the PALMS report within 48 hours (or fewer) from the conclusion of each weekly meeting.

Letters for Probation

- Accountability Letter #05 Probation: BNI Code of Ethics Violation
- Accountability Letter #06 Probation: BNI General or Administrative Policies Violation
- Accountability Letter #07 Probation: Lack of Participation
- Accountability Letter #08 Probation: Timekeeping
- Accountability Letter #09 Probation: Disruptive Behavior in the Chapter

Letter for Opening a Classification

- Accountability Letter #10 Opening a Classification for BNI Policy, Code of Ethics or Member Activity Violation

Secretary/Treasurer

The Secretary/Treasurer tracks, announces and collects new and renewal application and participation fees; maintains speaker rotation for presentations on BNI Connect; announces the speakers; tracks and collects venue fees, if applicable; provides direction to the Chapter.

Secretary/Treasurer Checklist of Responsibilities

To be on the Leadership Team, the Secretary/Treasurer agrees to the following requirements:

- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

BEFORE the Chapter Meeting Each Week (*Please note that not all items apply to chapters meeting online.)

- ☐ Arrive 15 minutes early to the meeting
- ☐ Prepare for a successful meeting
- ☐ Have Speaker Rotation List ready to announce upcoming speakers
- ☐ Have Biography Sheets ready for today's speakers
- ☐ Have Monthly Membership Dues Report available to remind Members who is upcoming on their renewal

DURING the Chapter Meeting Each Week

- ☐ Time the Member Weekly Presentations and Visitor Introductions
- ☐ Consider using the BNI Timer App found at iTunes App Store/Play Store for Android
- ☐ Announce upcoming speakers for the next four to six weeks
- ☐ Reminder: Optional door prize should be brought by the Feature Speaker(s) each week
- ☐ Introduce each speaker thoroughly and quickly using their Biography Sheets
- ☐ Announce which Members' due to renew in the next 60 days
- ☐ Announce which Members are late
- ☐ Remind Members to pay their Chapter fees

AFTER the Chapter Meeting Each Week

- ☐ Participate in the Weekly Chapter Success Call with your Director (along with your President and Vice President)
- ☐ Make bank deposits of monies received during the meeting from meal payments and room fees only
- ☐ Continue to rotate Members on the speaker rotation list; Enter Member's speaking topic and date in BNI Connect
- ☐ Ensure you received your Director/Director Consultant's Feature Presentation schedule; add dates to your speaker rotation list

AS NEEDED

- ☐ Conduct One-to-Ones with new Members as part of the [Passport to Success Mentor Program](#)
- ☐ Pay bills with the approval of the President

MONTHLY

- ☐ Attend monthly Chapter Success Meetings
- ☐ Report on Chapter Roster, Membership Dues Report, and Chapter bank account
- ☐ At the last Chapter meeting each month, connect with Member Engagement Specialist to ensure upcoming approved Membership Renewal Applications have been processed
- ☐ Print a current Chapter Roster from BNI Connect and place on Member Resource Table
- ☐ Balance the Chapter checkbook

ANNUALLY

- ☐ Create a budget for your BNI Chapter
- ☐ Help facilitate the Leadership Team Training Registration process for the following year's Incoming Leadership Team
- ☐ Participate in the Leadership Team Selection Process as guided by your Director/Director Consultant.

Monthly Membership Dues Report

Use this report to announce upcoming dues to your Chapter membership on a weekly basis.

Each week, in BNI Connect go to Reports >> Chapter >> Membership Dues Report, select today's date, then Go.

1. Check for the following:

- Check the report against who is attending your meetings as a Member. Is anyone missing?
- Check the late list to see who still needs to submit their online Membership Renewal Application with the automatic late fee.

Check to see who shows as dropped from the Chapter. If this is accurate, no action is necessary. If not accurate, collect renewal dues immediately and forward to the BNI Regional Office. Please note: Members who are more than 31 days late must submit full registration fees and application fees to re-instate their membership.

2. Work with the Vice President to confirm the Chapter Roster is up to date. Follow the process as outlined by your regional office.

Speaker Rotation Schedule

The Feature Presentation is a benefit of membership that is very important in the relationship-building process with the BNI Chapter. According to Policy #8: Only BNI Members who have completed the Member Success Program, and BNI Directors/Director Consultants can do Feature Presentations during the BNI Meetings. It is critical each Member has access to this membership privilege. New Members must also have access to deliver their Feature Presentation and must complete Member Success Program before being added to the rotation.

Tips for Creating the Speaker Rotation Schedule

1. When creating the speaker rotation, use the Chapter Roster Report on BNI Connect. The roster is in alphabetical order, which can become the order of the speaker rotation.
2. Once you have a first draft, you may ask Members with cyclical businesses if they would like to speak during a certain part of the year (i.e. landscaper in February to get ready for spring planting or a florist just before Valentine's Day).
3. Enter your final draft into BNI Connect by going to Operations >> Meeting Management >> View/Edit Speakers. By entering your upcoming Featured Speakers here, Members automatically receive an email reminding them of their presentation date. It also reminds them to complete their Member Biography Sheet online.
4. Additionally, by entering your speakers online in BNI Connect, your Chapter's web page will display your upcoming speakers and their respective topics.
5. Be sure to include your Director/Director Consultant's speaking schedule, if provided to you in advance.
6. Enter eight weeks and leave two weeks open. These slots will be for new Members completing the Member Success Program and your BNI Director/Director Consultant. When you have an opening six weeks out, you can insert someone in from another part of the list.

Bank Accounts for Non-BNI-Related Activities

The BNI Weekly Chapter Meeting Agenda contains all the elements needed to conduct a BNI Chapter meeting. Additionally, there are other aspects of operating a BNI Chapter (Visitor Events/Membership Drives , for example) that are also BNI-related activities. Meetings of the Membership Committee are BNI-related activities as well.

Chapters meet at various times of the day, sometimes convenient to the eating of a meal. Chapters may meet in facilities that have a rental fee or other charge. From time to time, Chapters may wish to buy flowers for a sick or grieving Member or contribute to a local or other charity in the name of the Chapter. These, however, are not BNI-related activities; they are not required for the conduct of BNI Meetings or ongoing Chapter activities, are not coordinated by a Director/Director Consultant and are solely at the discretion of the individual Members.

Some Chapters have decided that, for the convenience of the Members, it is useful to have a non- BNI-related activities bank account to handle these non- BNI-related activities. This may be used to aggregate payments for meals, make gifts to Members and others, have holiday parties for the Chapter, etc. Since these are not official or required BNI-related activities, this is at the sole discretion of the Members of the Chapter, and they take sole responsibility for the operation of the bank account.

If you choose to have an account for such purposes, we highly recommend never accumulating more than your current needs or at most two months' worth of aggregation of expenses to be paid for non-BNI-related activities.

Over the years, BNI Global LLC has been asked to provide information on best practices for opening and operating such accounts. While we provide such information, please bear in mind that having a bank account for non-BNI related activities of the Chapter is completely voluntary. It does not mean that you have formed a separate business entity. Again, we emphasize that you should only collect enough money to meet the cash outlay needs of your non- BNI-related activities for a maximum of a month or two in advance.



Opening Non-BNI–related Activities Bank Accounts (USA)

Note: Neither BNI Global LLC nor the BNI Franchisee will be liable for non-BNI–related activity bank accounts. Individual Chapter checking accounts are not required. All BNI participation fees are to be sent to the BNI Regional Office to process. BNI does not authorize Chapters to process participation fees through these or any other accounts.

To the extent a Chapter wishes to have a non-BNI–related activity bank account, the following example is a sample of how this may be accomplished. Accounts should be opened by a minimum of two Members who will be signatories on the account. These Members do not necessarily have to be Leadership Team Members. Remember, Secretary/Treasurers do not deposit membership and application payments; these are sent to the BNI Regional Office for further processing.

There should be two signatures required on checks for added protection. Whenever one of the signatories is no longer responsible for the account, a replacement should be selected by the Members.

The first step to opening the account is to obtain a federal Employer Identification Number (EIN) for banking purposes only. This may be done online, there is no charge for the EIN application, and you will receive your number immediately. Remember, you will fill out the form “for banking purposes only.” The IRS makes this option available because banks usually require an EIN for opening a bank account, even if it is a casual group of people not forming a new business entity but rather opening a bank account for their convenience. Other examples include a bridge club or a church league ball team.

Please note that the [irs.gov](https://www.irs.gov) website changes regularly! This information is valid as of IRS revisions effective March 2014. Always check the website for the most current form.

How to Apply:

Online (recommended method): <http://www.irs.gov>

Type “Apply for EIN Online” in the search box. Select the “Search” button next to the box.

The top recommendation from the search should be “How to Apply for an EIN.” Select this link. On the resulting page, click the link “Internet EIN” in the paragraph entitled “Apply Online,”

At the bottom of the page that follows, click the link “APPLY ONLINE NOW.” On the resulting page toward the bottom, click on “Begin Application.”

On the first part of the online application, you are asked to identify the type of legal structure applying for the EIN. Choose “View Additional Types” toward the bottom of the page. Select “Continue.”

On the “Additional Types” page, choose “Community or Volunteer Group.” Select “Continue.” On the next page, you will see a description of such a group—and that they generally need a bank account only for banking purposes. Choose “Continue.”

On the next page, you will be asked for your name and Social Security number. As noted on the top of the page, this is for identification purposes only. It is also so that the IRS can make sure that you only make one EIN application per day and that you are authorized to apply for this EIN. It will have no effect otherwise. Often, this page is filled out by lawyers and accountants authorized to apply for EINs on behalf of their clients. Be sure to check the button for “I am a responsible and duly authorized officer or Member of this organization. Choose “Continue.”

Continue through the rest of the application process. During the process, you will be asked “What does your business or organization do?” Select “Other,” then “Continue.” On the resulting page, select “Other—Please specify your primary business activity” and fill in the form with an appropriate description, such as “Networking meetings” or “Breakfast meetings” or similar. Select “Continue.”

You will be prompted to receive your letter online or by mail; make your choice and select “Continue.”



Telephone: Call 1-267-941-1099 to apply over the phone between 6:00 am to 11:00 pm EST

The person making the call must be authorized to sign the form or be an authorized designee. We recommend that you download a copy and complete Form SS-4 before the call, as these are the questions the IRS representative will use during the conversation. The IRS representative will also ask you to fax the completed and signed form. Please be advised the IRS representative will only speak with the designee who signed the form. Always check the website for the most current form.

Form SS-4: Application for Employer Identification Number

Note: Do not use any punctuation or characters other than alphanumeric. You will complete only lines 1, 4a-4b, 8a, 9a, 10 and 18.

Line 1—Name: Enter the Chapter Name

Lines 4a-4b—Mailing Address and County: Enter the address where statements will be mailed

Line 8a—Enter “no”

Line 9a—Type of Entity: Check “other” and enter “Breakfast club” (or other as appropriate)

Line 10—Reason for applying:

Check “Banking purpose (specify purpose)”

Enter specific purpose: “Aggregate meal and other expenses”

Line 18—Prior Application: Check the “No” box

Third Party Designee: Enter the name of the primary signatory on the account and his/her phone number at the bottom. A signature will be needed only if you are faxing or mailing this form in. Remember, if obtaining the EIN by phone, this form will need to be ready for faxing.

Remember, this process does not result in creating a new “entity.” The Chapter itself belongs to either BNI Global LLC or to the BNI Franchisee. All non-BNI–related activities that are run through the Chapter bank account are voluntary, not required by BNI, and are solely for the convenience of the Members in paying restaurant, facilities and other incidental expenses for non-BNI–related activities of the Members of the Chapter.

Open a Non-Interest-Bearing Checking Account

1. If you choose to open a Chapter checking account, it must be a non-interest-bearing bank account. (Interest bearing accounts would require tax filings by the Chapter.) Banking fees, if applicable, are paid by the Chapter.
2. The name of your organization is the Chapter name (not Business Network Int'l or BNI); for example, The Emerald Valley Professionals Chapter or The Progressive Connections Chapter. In this case, BNI should NOT be part of the checking account name. This prevents confusion at the bank in the event that the same bank holds accounts for several different Chapters.
3. Two signatures to sign checks are strongly recommended, typically the President and Secretary/Treasurer. When the Leadership Team changes the signatures change on the account.
4. Contact your banker to inquire about the bank’s process of changing signatories.
 - They may simply allow the account to be transferred between people, or
 - They may prefer that the current account be closed, and a new account opened with the new signatories.



5. Some banks also require your Chapter to file for a business license with the State. You can do this online. Any fees are at the Chapter's expense.
6. It is recommended that bank statements are reconciled and audited before transferring to a new incoming Secretary/Treasurer. It is recommended that the bank balances be kept at a minimum.
7. Chapters should purchase carbon copy receipt books and provide a receipt for each payment accepted.

Visitor Hosts

Visitor Hosts make a positive first impression on the visitors and substitutes of the Chapter by greeting them with a friendly face, introducing them to Members and giving a brief overview of what to expect during the meeting. They also conduct an orientation for all visitors after the meeting; record visitors and substitutes in BNI Connect; follow up with the visitors after the meeting.

Visitor Host Team Checklist of Responsibilities

To be on the Leadership Team, the Visitor Host(s) agrees to:

- ☐ Fulfill the responsibilities listed below
- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

BEFORE the Chapter Meeting each Week—Greeter *Please note that not all are applicable to chapters meeting online.

- ☐ Arrive 15 minutes early to the meeting
- ☐ Put up Chapter signs in lobby/hallway/outside door to create visibility for visitors if online use professional background, ideally BNI branded
- ☐ If in-person meeting, setup up the Welcome Table near entrance to meeting room
 - Visitor Name Badges and markers
 - Log into BNI Connect Visitor Portal and Print Visitor Registration List
 - Visitor Sign-In Sheets, in case a visitor doesn't have a business card
 - Optional Member Sign-In Sheets and pens
 - Chapter & BNI Brochures
 - BNI Books
- ☐ If online, ensure Visitor Breakout Room is set up - Greet visitors as they arrive
- ☐ Collect two business cards from each visitor
- ☐ Write who invited them on the back of each card
- ☐ Give one copy of all business cards to the President before the meeting starts
- ☐ Explain any special pronunciations or circumstances to the President
- ☐ Give one set of visitor business cards along with the Visitor Sign-In Sheet to the Visitor Host—Follow-Up Specialist to enter the visitor contacts into BNI Connect and mail a Thank You Card after the meeting

DURING the Chapter Meeting each Week—Open Networker

- ☐ Set Visitor Expectations
- ☐ Let them know they will have an opportunity to pass around their business cards during the meeting if in-person
- ☐ Explain that they will have the opportunity to give a brief introduction of their business during the Visitor portion of the introductions if time allows
- ☐ Introduce the visitors to the Members in their Contact Sphere

AFTER the Chapter Meeting Each Week—Orientation Facilitator

- ☐ Conduct the Visitor Orientation after the meeting and invite them to apply for membership
- ☐ Review Visitor Orientation Sheet with visitors
- ☐ Walk through the application process
- ☐ Answer any questions they may have

AFTER the Chapter Meeting Each Week—Follow-Up Specialist

- ☐ Mark Visitor attendance in the BNI Connect Visitor Portal. Enter the non-registered visitors using one set of business cards from the Welcome Table each week
- ☐ Mail a Thank You Card to each first-time, qualified visitor
- ☐ Call each qualified visitor within 24 hours of the meeting (2 hours after is ideal)
- ☐ Ask their impressions of the meeting
- ☐ Answer questions they may have
- ☐ If you think they'd be a good fit, but they are still unsure, invite them back to visit next week

AS NEEDED

- ☐ Coordinate new Members' participation on the Visitor Host Team as part of the Passport to Success Mentor Program.

MONTHLY—Visitor Host Coordinator

- ☐ Attend Monthly Chapter Success Meetings on behalf of the Visitor Host Team
- ☐ Report on number of visitors, number of applications, closing ratio and visitor feedback
- ☐ Order Visitor Host supplies through the Chapter President if online ensure you have digital visitor materials readily available.

The BNI Connect Visitor Portal

Our newest innovation is the Visitor Portal within BNI Connect. As a Visitor Host, be sure you have [watched this video for an overview](#) on marking attendance and entering Visitors, Guests, and Substitutes.

Definitions**Visitor**

A visitor is a business professional who would benefit from an increase in referrals and would benefit from belonging to and participating in a BNI Chapter. This person is seeking information about BNI and your Chapter to decide whether BNI is a good fit for them and their business. If the fit is right and the person is impressed with and sees value in belonging to your Chapter, they may apply for membership if their classification is available.

Someone who wants to join a BNI Chapter and is not already involved in a forming chapter, but their classification is filled in the chapter they are visiting. Please alert your Chapter Director so they may assist with their BNI interest.

***Please enter both types as a visitor into BNI Connect Visitor Portal to enable automatic email campaigns from BNI Global.

Guest

A guest is a person visiting the Chapter meeting who is not a viable candidate to become a Member. Examples of guests are:

- A person who works full-time for a company that does not rely on referrals, sales or commissions for their job
- A person who is retired and intends to remain retired
- A person who is not employed and/or does not want to be employed
- A family member of a BNI Member who is visiting town and has no intentions of becoming a Member
- A person who lives out of the area and is not moving to the area
- A person who is already a Member of another BNI Chapter or a new forming Chapter

While guests can be a great source of referrals and business to the Members, they will not become Members of your Chapter. They should be warmly welcomed by the Visitor Host Team. All Members should make a point of getting to know all visitors and guests.

***Please enter these guests into BNI Connect Visitor Portal as guests.

Substitute

A substitute is a person who is attending with the purpose of substituting for a specific Member. This person could be a visitor or a guest. The goal is to have all substitutes be visitors and not guests.

***If the substitute qualifies as a visitor, please enter them into BNI Connect Visitor Portal.

Visiting BNI Members (not Substituting)

Members visiting other Chapters should announce that they are from another Chapter. Visiting Members must not do or say anything that competes with a Member's BNI classification in the Chapter. Visiting Members should pay venue/meal fees.

Before visiting another Chapter, the visiting Member should register to attend through the BNI Connect Mobile App to let the Leadership Team know they are coming. Visiting Members follow the same visiting policies as non-members; no more than two visits allowed.

***Please enter these guests into BNI Connect Visitor Portal as guests.

Visitor Orientation

The Visitor Orientation process includes recognition of the visitors prior to the end of the meeting and escorting them to another room to formally invite them to submit an application. By formally conducting a Visitor Orientation, Chapters have seen an increase in converting visitors to Members. The visitors now have all their questions answered and they fully know the process of applying for membership. This process is not high pressure, but rather an educational tool to get the visitors the information they need to add 45+ people to their referral network!

Use the [following infographic](#) to talk with the Visitor about BNI benefits. Just walk through each section of the infographic.



Congratulations

You are invited to apply for membership.

BNI® membership makes business more rewarding and life more fun.

LIFE WITH BNI	VS	BUSINESS WITHOUT BNI
✓ A team to generate a steady flow of customers ✓ A network of business owners who know how to give meaningful referrals and training on how to leverage it. ✓ You are the only provider for your business category within your chapter. ✓ Comprehensive training programs that grow with you as you scale your company. ✓ A room of givers dedicated to helping you grow. ✓ People to help you hold yourself accountable to achieve your goals and make your dreams come true.		✗ On your own, trying to figure things out ✗ Too few, inconsistent business referrals with a weak referral network ✗ Your message gets lost with so many competitors clamoring for the same business. ✗ On your own to develop the skills you need as you grow your business. ✗ Dealing with takers, who don't appreciate what you offer. ✗ Goals slip and dreams get delayed because it's easy to slack off because no one is watching.

3 Easy steps To become a BNI member

1 Complete the online application.

2 Membership Committee reviews your application, accepts you and the chapter President announces your membership at the next meeting.

3 Complete the Member Success Program to accelerate the referrals you generate for your business.

bni.com

BNI'S 10 COMMITMENTS TO YOU to help you grow your business



- 1 Your chapter will not accept another member within your specific business category.
- 2 Exposure to a team that is excited and motivated to get to know your business and your target customer to help your business grow by giving you referrals.
- 3 Make effective use of your time by running meetings in accordance with an agenda optimized for maximum results in the shortest possible time.
- 4 A wealth of networking tools to help you grow your business.
- 5 Get you results as fast as possible with a comprehensive Member Success Program to help you get the most out of your BNI membership.
- 6 Connect with members around your country and the world online and through regional, national and international events.
- 7 BNI's mobile app and BNI Connect enable you to build relationships with members in 70 countries around the world.
- 8 Provide you with up to 50 networking meetings a year to generate referrals.
- 9 Business tradeshows and local conferences to network with BNI members throughout your region.
- 10 Advanced business education programs to help you grow your business through more effective networking, public speaking, and business development.

YOUR 5 COMMITMENTS TO BNI to get the biggest impact from your membership

- 1 Arrive early and stay for your weekly chapter meetings.
- 2 Represent your primary occupation, not a part-time business.
- 3 Send a substitute when you cannot attend your weekly chapter meeting.
- 4 Give referrals and/or bring visitors to chapter meetings.
- 5 Conduct your business according to BNI's Code of Ethics or the formal professional standards for your occupation.

bni.com

Visitor Host—Follow-Up Specialist

After each meeting, the Visitor Host Follow-Up Specialist follows up with each Visitor. This needs to be within 1-2 business days of your meeting to have an impact.

Visitor Host Portal Walk-thru <https://www.schoox.com/3512947/managing-visitors-in-bni-connect>

1. Contact the Visitor Host Orientation Facilitator, if possible, to get feedback regarding the respective behavioural style of each first-time, qualified visitor or substitute: Fast Decision Maker or Reserved Decision Maker.
2. Before leaving the meeting, the Visitor Host—Follow-Up Specialist uses the second set of business cards gathered at the Welcome Table to write and address a Thank You Card to all first-time, qualified visitors and substitutes, thanking them for attending the meeting.
 - Manage the BNI Visitor attendance tracking through the Visitor Portal. See definitions [here](#).
3. The Visitor Host—Follow-Up Specialist then personally calls all qualified Visitors no later than two business days after their visit to thank them for coming (and invite them back if they didn't apply for membership). During the follow-up phone call, consider scheduling a One-to-One with each visitor; this is a great way to make a personal connection with the visitor and provides excellent business exposure for the Visitor Host—Follow-Up Specialist!
 - During this follow-up phone call, ask:
 - What were your impressions of our meeting this week?
 - Do you believe it will be a productive use of your marketing time?
 - Did you get a chance to fill out a Membership Application, or do you need the website address?
 - Be sure to inform them of the next meeting format and provide the meeting link or meeting location.

Education Coordinator

The Education Coordinator prepares a three to five-minute Networking Education Moment dedicated to reminding Members about improving networking skills, BNI Policies, goals, successes, etc. Also works closely with the President and other leaders to address Chapter specific issues in a timely fashion. (i.e., inviting more visitors or the attendance policy).

Education Coordinator Checklist of Responsibilities

To be on the Leadership Team, the Education Coordinator agrees to:

- ☐ Fulfill the responsibilities listed below
- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

BEFORE the Chapter Meeting each Week *Please note that not all apply to chapters meeting online.

- ☐ Arrive 15 minutes early to the meeting
- ☐ Bring complete Chapter Library and check-out system to each meeting
- ☐ Prepare a 3- to 5-minute Networking Education Moment from BNI material
- ☐ May assign Members to provide the Networking Education Moment each week

DURING the Chapter Meeting each Week

- ☐ Provide the 3- to 5-minute Networking Education Moment
- ☐ Caution: Although handouts are good, they often take up too much time if the exercise requires a response from each Member during the meeting

AFTER the Chapter Meeting each Week

- ☐ Schedule upcoming Networking Education speakers, if applicable
- ☐ Communicate with Chapter President weekly to ensure the upcoming Networking Education Moments are in line with Chapter goals

AS NEEDED

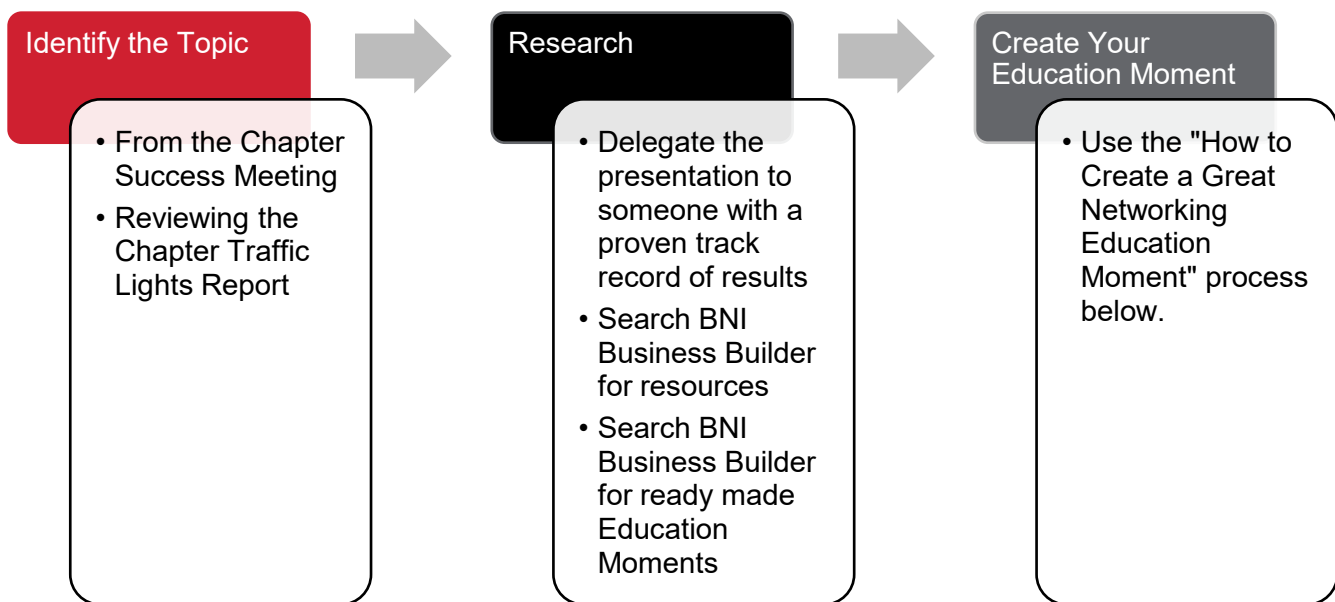
- ☐ Conduct One-to-Ones with new Members as part of the [Passport to Success Mentor Program](#)

MONTHLY

- ☐ Attend [Monthly Chapter Success Meetings as needed](#)
- ☐ Plan topics for the next month's Networking Education Moments that can assist the Chapter to reach any short- or long-term goals and objectives
- ☐ Maintain a Chapter Library
- ☐ Display Chapter Library at meetings
- ☐ Create a checkout system for Members to borrow items

- ❑ Suggestion: It is strongly recommended that you require a cash or check deposit on books or audio borrowed from the Chapter Library. This will enable you to replace unreturned items.
- ❑ Coordinate with Leadership Teams and/or Membership Committee on Chapter goals and education necessary for Chapter growth and development

The Process



Education Moment Sample Outline

I. Relate it to business first

Provide an example or a story to help illustrate what you're talking about. Example: "As business professionals we often set appointments. But what happens if you don't show up, are late or have to leave early? Does it make a difference to the client? Of course, we all know life happens, so we'll often forgive someone. But what if it became a habit? What if you had a business professional you were trying to meet with who consistently arrived late without calling or simply didn't show up? Would it impact your relationship with that person?"

II. Let the audience know WHY this topic is important

Example: "In a way, it's a promise we make to another person to be somewhere on a particular day at a particular time, right? That other person has set aside the time to meet with us and is probably looking forward to learning more about you. When you arrive when you said you would, what are you building? Trust. What does trust build? The relationship. What does a professional relationship build? Business."

III. Relate the topic to BNI

Example: "In BNI, our goal is to build quality professional relationships that make it easy to pass referrals. Open Networking is a great time to get a question answered, set up a One-to-One, or find out one more thing that you can do to help generate a referral to someone. During the meeting, we get the opportunity to train one another about our businesses through the Weekly Presentations as well as the Feature Presentations. If we're not here for these important pieces, it becomes more difficult to build the trust we need that leads to business."



IV. Provide additional resources (if applicable) / Wrap Up

“If you have questions about BNI’s attendance policy, or need help finding a substitute, please contact someone on the Membership Committee (list Membership Committee Members’ names, including the Vice President). They’ll be happy to support you in any way they can. Thank you.”

Additionally, you can contact your BNI Regional Office for Networking Education Moment ideas.

Mentor Coordinator

The Mentor Coordinator makes sure each new Chapter Member completes the Mentor Program by helping the new Member set up One-to-Ones with specific Members who can help them with specific mentoring topics; ensures each mentor has the one-page guide to the mentoring topic they are to cover with the new Member; follows up with the new Member weekly to ensure progress is being made.

Mentor Coordinator Checklist of Responsibilities

To be on the Leadership Team, the Mentor Coordinator agrees to:

- ☐ Fulfill the responsibilities listed below
- ☐ Submit signed BNI Leadership Team Non-Disclosure, Non-Solicitation and Non-Compete Agreement
- ☐ Complete Leadership Team Training

BEFORE the Chapter Meeting each Week *Please note that not all apply to online BNI Meetings

- ☐ Arrive 15 minutes early to the meeting
- ☐ Greet and network with new Members and Mentors as they arrive
- ☐ Introduce yourself to new Members; Ask them to stay after the meeting for a short New Member Orientation
- ☐ Ask the Vice President for a 30 second announcement during the Membership Committee Report to recognize Members who have completed the Passport to Success Mentor Program, as needed

DURING the Chapter Meeting each Week

- ☐ Award Notable Networker Certificates to Mentor Program Graduates, if applicable

AFTER the Chapter Meeting each Week

- ☐ Conduct the Passport to Success meeting/New Member Orientation on weeks when a new Member is inducted

WEEKLY

- ☐ Follow up with new Members weekly to see if they need assistance in progressing through the program

MONTHLY

- ☐ Attend monthly [Chapter Success Meetings](#)
- ☐ Discuss ways that the Mentor Coordinator can assist the Chapter to reach any short- or long-term goals and objectives and coordinate with Leadership Team on Chapter goals and education that can be addressed during the mentoring process
- ☐ Order Passports through the Chapter President, as needed if online provide fillable digital passport to new members

ONGOING

- ☐ Ensure there are adequate Members in good standing to fill all Mentor positions in the Passport to Success Mentor Program using the Member Mentor Worksheet

Building the Mentoring Team

Attributes of Good Member Mentors

Use the following criteria as a guideline for selection:

- Positive attitude
- Rank high in the Power of One Report
- Value building relationships through One-to-Ones
- Take the responsibility seriously
- Willing to be a Member Mentor for an extended period
- Good BNI attendance

Member Mentor Worksheet

	Topics	Position	Current Trained Member Mentors
1	Roles, Agenda, Expectations & Weekly Commitment	President Past President	• •
2	Rules of the Game, PALMS, Power of One	Vice President or Trained Membership Committee Member	• •
3	Biography Sheet, Speaker Rotation, Chapter Fees, Renewal Payments	Secretary/Treasurer, Past Secretary/Treasurer	• •
4	Attendance, Substitute Program	Trained Membership Committee Member	• •
5	Referrals vs Leads, Chapter Education Units	Education Coordinator	• •
6	One-to-One Etiquette, GAINS Exchange	Member Who Conducts Quality One-to-Ones	• •
7	Chapter Tools: BNI Connect Profile, Record Activity	Member Who Effectively Uses BNI Connect®	• •
8	Gold Club Badge, Bringing People, Value of a Visitor	Gold Club Badge Member	• •
9	Visitor Host Experience	Visitor Host Team Member	• •
10	Local Trainings, Events Calendar, Online Registration	Member Who Regularly Attends Trainings	• •

Training Member Mentors

Once the Mentor Coordinator and the Membership Committee have identified Member Mentor candidates it is important for them to be trained. This can be done using [The Passport to Success for Member Mentors eLearning](#) on BNI Business Builder. Mentor Coordinators can assign and track the training completion by clicking the assign button and enter the names of the Member Mentors.

BNI Passport Instructions

Once a new Member is inducted into the Chapter the Mentor Coordinator's job begins. Every new Member will be given a Passport to Success and instructed that they are to meet with the Mentor Coordinator immediately following the meeting to conduct the New Member Orientation.

Mentor Coordinator and New Member's First Meeting

Once a new Member is inducted into the Chapter, the Mentor Coordinator will meet with the new Member right after the meeting to review the Passport to Success. The Mentor Coordinator may need to set a time and location to meet with the new Member and explain the proper use of the Passport outside of the regular meeting.

The Mentor Coordinator will be the new Member's first One-to-One. Remind them to bring the Passport and you will assign the names of the Member Mentors they are to meet with as well as review the Passport and other programs available.

Things to Cover in the First Meeting

- Review the Passport – Complete the Welcome Page
- Review How to Use Your Passport
- Discuss the importance of the BNI Core Values & BNI Code of Ethics
- Review My BNI Checklist
- Once you have reviewed the Passport, it is now time to move to the next step

Assign the Names of the Member Mentors

This is the most important part of the Passport to Success. When new Members are engaged with seasoned Members, retention increases. This is the start of the engagement process so that the Chapter and the new Member both win. New Members will learn best when they are supported and helped by current positive seasoned Members.

- Note: Avoid assigning one person to multiple roles. The goal is to get as many current Members to interact with new Members as possible. Engagement and relationship development are keys to renewing Members. The more people that new Members can interact with on a One-to-One basis, the more likely they will experience success and, therefore, renew their membership!

Instructions for Using the Passport

- Assign the name of each Member Mentor using the Member Mentor Worksheet. Have the new Member write the names in the Passport or hand them a copy of the worksheet.
- Briefly explain to the new Member what each person will cover as outlined in the Member Mentors and Topics section.

- Explain the process for scheduling a One-to-One with each Member Mentor. The Member Mentor should be expecting the new Member to request a One-to-One. The Member Mentors should also be prepared to reach out to the new Member to schedule a One-to-One.
- Explain the process if they are having trouble getting a return call or appointment. The Mentor Coordinator will help the new Member set them up during Open Networking or just after the meeting each week.
- Remind them the expectation is only one One-to-One meeting per week though they are encouraged to do as many One-to-Ones as possible. The fastest way to trust (and ultimately receive referrals) is through effective One-to-Ones, though they are not expected to complete the Passport quickly.
- The order in which they conduct their One-to-Ones is not important.
- Explain that you will be checking in with them weekly to help them get the Passport to Success completed.
- Remind them they will be doing One-to-Ones with the Chapter's Ambassador or Director/Director Consultant.
- It is the Mentor Coordinator's responsibility to ensure that the new Member understands the importance of completing their Passport over the next 8 to 10 weeks.
- Answer all of their questions and give them your contact information should they have questions later.

Check-In and Follow-Up

Every two weeks, check-in with the new Member to make sure they are on track to complete their Passport. Look at the new Member's Passport to Success:

- Check for signatures from Member Mentors – Are they on target to get this completed within the first 12 weeks?
- Review the My BNI Checklist – Are they on target to get this completed within the first 12 weeks?
- Check for signature from the Ambassador or Director/Director Consultant – Have they been introduced to their Chapter Ambassador or Director/Director Consultant? Have they had their first One-to-One with the Ambassador or Director/Director Consultant?

Ask if they need help and remind them, they can always call you if they are having challenges.

Appendix

Renewal Process

The Vice President is the overall manager of the renewal process, but the Secretary/Treasurer and Membership Committee Members are also involved in each Member's renewal. Please be aware that if you have known this process previously, it has been updated and streamlined to make it easier for the Membership Committee and Members to include an automatic system approval.

Process Overview:

1. In BNI Connect, Member is tentatively approved 60 days before their renewal date.
 - a. Member is moved to the Pending Application page in BNI Connect.
 - b. VP can then approve or deny the Member (proactively before Member starts the application).
2. Member and LT are notified via email.
3. Members can choose to renew using one of two methods:
 - a. Use the link in the renewal announcement email or
 - b. Log into BNI Connect, web/computer version and click the 'renew now' link.

If the Member completes and submits their renewal application, the VP is notified and can approve or decline.

- a. *If no action occurs by VP by 14 days prior to renewal date, the Member is **automatically approved**.*
- b. An automatic or manual approval triggers a payment email to the Member.
 - a. Member can pay for their renewal using the link in the renewal approval announcement email or the payment page on the renewal application process if pre-approved.
- c. If Membership Committee decides not to renew the Member and the VP denies the renewal in BNI Connect, the emails to the member stop. VP calls Member.

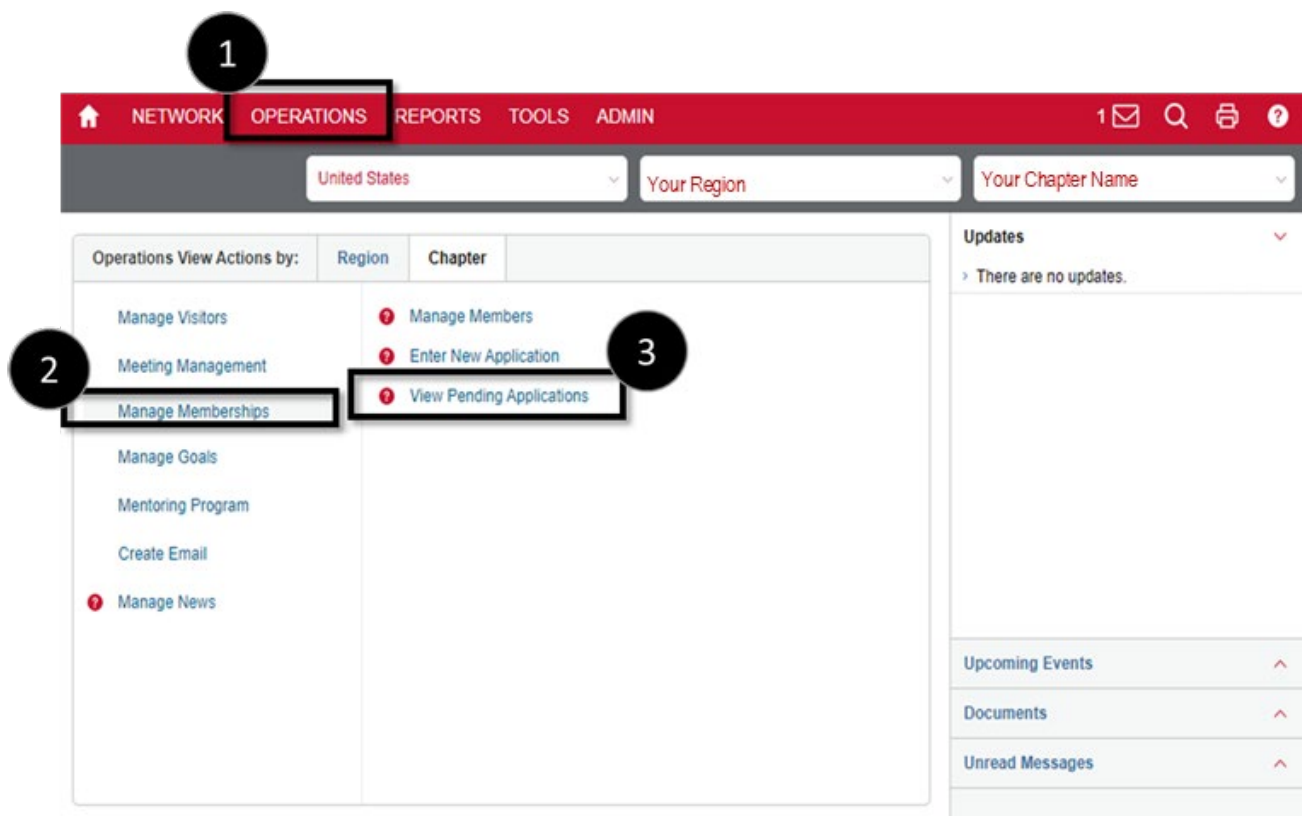
If Member takes no action on their renewal application:

- a. At 29 days of renewal date, Member is reminded to submit their application via email several times until application is submitted.
 - a. Secretary/Treasurer is sent alert emails
 - b. VP and Director are sent alert emails
- b. *If no action occurs by VP by 14 days prior to renewal date, Member is **automatically approved**.*
- c. The Member can now pay for their renewal.

Approving Renewal and New Applications in BNI Connect

Vice Presidents monitor the Pending Applications Screen for New and Renewing Applications statuses.

In BNI Connect web/computer version > Operations > Chapter > Manage Memberships > View Pending Applicants.



You will see all new and renewal applications that have been submitted with and without payment. There are several status indicators listed in the Status Column.

Renewal Status Column	Meaning	Action Needed
No Application – Tentatively Approved (up to 60 days from renewal date)	Member has not yet acted on their pending renewal; it was tentatively approved by the system.	Member to apply for renewal. VP to approve or decline.
Draft Application – Tentatively Approved (between 60 to 14 days from renewal date)	Draft indicated Member has started but not completed their renewal application, it was tentatively approved by the system.	Member to complete and submit renewal application. VP to approve or decline.
Application Submitted – Tentatively Approved (between 60 to 14 days from renewal date)	Renewal Application has been submitted by the Member; it was tentatively approved by the system.	VP to approve or decline to allow Members to PAY ONTIME .
Draft Application - Approved	Member started the application, and the VP has approved.	Member to complete and submit the application and payment.
No Application - Approved	Member has not yet started their renewal application, VP has approved	Member to complete and submit application and payment.

Application Submitted – Approved	Member submitted, VP approved, no payment has been initiated	Member to complete payment.
Payment Selected – Approved (region to Confirm)	Member submitted application and payment BUT <i>payment was unsuccessful</i>	VP or ST contact BNI Regional Office
Payment Selected – Approved (Region to Reconcile)	Renewal Application has been submitted, approved and successful paid.	All steps have been completed by Chapter, BNI Regional Office will reconcile within 24 business hours of payment.

To review and approve or decline a submitted renewal application, the VP accesses the Pending Applications Screen and clicks the red arrow in the “Approve” Column. The next screen allows review of information along with approve or decline button.

The Member can only pay after the VP has approved or the auto approval occurs on a completed submitted renewal application. Thus, a timely submission of the renewal application by the Member and a timely approval by the VP (in BNI Connect) assures the Member has enough time to pay prior to accruing a late fee.

Once the renewal date occurs, please refer to the explanation below:

Action	Days 1-15	Days 16-31	Day 32
Member did not initiate renewal in BNI Connect® by the due date	Member is LATE	Member is EXPIRED	Member is DROPPED
	↓	↓	↓
	The \$50 Late Fee now applies	The \$50 Late Fee still applies	The Application Fee now applies
	↓ Member can still initiate renewal in BNI Connect®	↓ Member can no longer access BNI Connect or the App, “soft drop from the system” To renew LT submits ticket on behalf of the Member at Regional Website > Member & LT Resources	↓ Member reapplies to the chapter using a new member application

- Late = Member did not renew by renewal date i.e. November 1, Member can still renew using BNI Connect. Late Fee applies.
- Expired = Member did not renew as of day 16 i.e. November 16 and now has no access to BNI Connect and Mobile App. Secretary/Treasurer contacts Regional Office to assist Member with renewal process. Late fee applies.
- Dropped = Member did not renew one month following Renewal Date i.e. December 1. Member must reapply as a new applicant and Application Fee applies or member voluntarily resigned.

After the renewal process is complete, the President is notified via email.