

PRESIDENT'S TRAINING

**VALLEY FORGE,
PENNSYLVANIA**

MAY 16-17, 2003

WELCOME EVERYONE

My name is Deb Foley

**I am the advisor to one of the 4 Key
Operating Committees,
COMMUNICATION**

**The other 3 committees are:
Administrative
Development
Finance**

**I have been an active Pioneer for
14 years**

**I am a Past
Council & Chapter President**

I am a Hall of Fame recipient

I have 31 years Telephone experience

I am married

Have 2 teenage daughters

Love to travel

Avid photographer

Love to visit Old Country Stores

Love volunteering!

PRESIDENT'S TRAINING TARGET POPULATION

CHAPTER -- COUNCIL -- CLUB

POSITION

PRESIDENT

1ST VICE-PRESIDENT

TERM IN OFFICE

7/1/2003-12/31/2004 (6 MONTHS)

1/1/2004-12/31/2005 (12 MONTHS)

7/1/2003-12/31/2005 (18 MONTHS)

ROLL CALL

NOVA FIVE - 5

LIBERTY BELL - 6

LEONARD H. KINNARD - 7

HG MC MCULLY – UPSTATE- 12

FORT PITT -13

THOMAS SHERWIN- 14

ALEXANDER GRAHAM BELL -15

WILLIAM J. DENVER -20

VERIZON WEST -25

JASPER N. KELLER -33

GENESEE –37

WEST VIRGINIA -42

OLD DOMINION -43

MARYLAND -44

HG MC CULLY – DOWNSTATE -81

PAUMANOK -85

EMPIRE STATE -97

EXCELSIOR -98

TELCORDIA -99

19 CHAPTERS

FROM MAINE TO VIRGINIA

FROM VIRGINIA TO CALIFORNIA

AND STATES IN BETWEEN

WORKSHOP OBJECTIVES

1. HAVE AN UNDERSTANDING OF THE ASSOCIATION, GROUP (formerly known as Region), COMMITTEE STRUCTURE AND OPERATIONS
2. DEVELOP A MEETING AGENDA
3. DEVELOP A BUSINESS PLAN
4. HAVE AN UNDERSTANDING OF ACCOUNTING AND FINANCIAL PRACTICES AND FORMS
5. DEVELOP A BUDGET TO SUPPORT THE BUSINESS PLAN
6. DEVELOP A GRANT REQUEST BASED ON BUSINESS PLAN OBJECTIVES
7. DEVELOP ONE NEW FUNDRAISING ACTIVITY
8. DEVELOP ONE LITERACY OR READING PROGRAM BASED ON BUSINESS PLAN OBJECTIVES.
9. HAVE AN UNDERSTANDING OF THE PARTICIPATION/PA7 REPORTING SYSTEM AND ROLE IN THE AWARDING OF CORPORATE GRANTS AND TP AWARDS.
10. HAVE AN UNDERSTANDING OF THE TELECOM PIONEER, VERIZON VOLUNTEERS AND PIONEER FOUNDATION AWARDS PROCESS.
11. DETERMINE ONE PROJECT TO BE SUBMITTED FOR THE TELECOMPIONEER FOUNDATION GRANT, OR DODDS FUND GRANT, OR VERIZON MATCHING FUNDS PROGRAM.
12. HAVE AN UNDERSTANDING OF THE GROUP MEMBERSHIP DATABASE, MAINTENANCE ISSUES , AVAILABLE INFORMATION AND USES.
13. DEVELOP ONE MEMBERSHIP RECRUITMENT STRATEGY
14. DEVELOP A PARTICIPATION & MENTORING ACTION PLAN
- 15. HAVE FUN!**

OUR CURRENT OPERATING STRUCTURE

1. TELECOMPIONEER ASSOCIATION –

CEO – JAMES GADD

**PRESIDENT - FRANK FAGAN
(CURRENT - 12/31/03)**

**INCOMING PRESIDENT
Mary Manning (1/1/04)**

2. SPONSORING GROUPS

**ALIAN, AT&T, BELL SOUTH, BROADWING, FRONTIER,
MTS, NEW OUTLOOK PIONEERS, QWEST, SASK TEL,
SBC, TELCORDIA & VERIZON**

PURPOSE:

The purpose of the TelecomPioneers shall be charitable and educational, including but not limited to promoting and supporting the charitable and educational goals of current and retired telecommunications employees in their communities. (TelecomPioneers bylaws)

TO LEARN MORE, VISIT THE ASSOCIATION WEB SITE AT:

WWW.TELECOMPIONEERS.ORG

**2. VERIZON-FRONTIER-TELCORDIA
GROUP VICE PRESIDENT-CAL FROST**

3. KEY OPERATING COMMITTEE ADVISORS:

ALL ADVISORS ARE PAST CHAPTER PRESIDENTS.

- **ADMINISTRATIVE MAGNOLIA SMITH**
- **COMMUNICATIONS DEB FOLEY**
- **DEVELOPMENT BRUCE YENNIE**
- **FINANCE JOANNE DEMPSEY**
- **LIFE MEMBER REPS NORTH/SOUTH -
RON SIMPSON & SYLVIA REYBURN**

4. OTHER KEY PARTICIPANTS:

- **ADMINISTRATION CENTER**
DIANE NELSON
- **MEMBERSHIP DATABASE PURIFICATION**
DIANE RODGER
- **GROUP PA7 COORDINATOR**
DIANE RODGER
- **WEBSITE DEVELOPMENT**
JILL WILLIS
- **GROUP WEB PAGE ADMINISTRATOR**
DIANE RODGER
- **ESTORE** **BRUCE YENNIE**

**TO LEARN MORE ABOUT OUR GROUP OF CHAPTERS, VISIT
OUR WEB PAGE AT:**

WWW.VERIZONPIONEERS.COM

WHO ARE WE?

501C(3) - CHARITABLE

VOLUNTEER ORGANIZATION

EDUCATION MISSION

COMMUNITY SERVICE

501C-3 – CHARITABLE - NOT FOR PROFIT

Corporations, and any community chest, fund, or foundation, organized and operated exclusively for religious, charitable, scientific, Testing for public safety, literary, or educational purposes, or to foster national or international amateur sports competition (but only if no part of its activities involve the provision of athletic facilities or equipment), or for the prevention of cruelty to children or animals, no part of the net earnings of which inures to the benefit of any private shareholder or individual, no substantial part of the activities of which is carrying on propaganda, or otherwise attempting, to influence legislation (except as otherwise provided in subsection (h), and which does not participate in, or intervene in (including the publishing or distributing of statements), any political campaign on behalf of (or in opposition to) any candidate for public office.

VOLUNTEER ORGANIZATION

TelecomPioneers is the largest industry-related volunteer organization in the world, with chapters located throughout the United States, Canada and Mexico. Founded in 1911, **TelecomPioneers**, formerly known as the Telephone Pioneers of America is comprised of nearly 750,000 current and retired telecommunications employees who have joined together to make their communities better places in which to live and work.

Our purpose is...

"To promote and participate in activities that respond to community needs and problems; to provide a means of friendly association for telecommunications employees and those retired; to foster among them a continuing fellowship and a spirit of mutual helpfulness; to contribute to the progress of the Association and promote the happiness, well-being and usefulness of the membership; to exemplify and perpetuate those principles which have come to be regarded as the ideals and traditions of the industry."

-- Constitution of the TelecomPioneers

**PRIMARY GOAL: VOLUNTEER
IN THE COMMUNITIES WE SERVE.**

**VOLUNTEER FOR OUR CORPORATE SPONSORS
VERIZON - FRONTIER - TELCORDIA**

**VOLUNTEER/PARTNER WITH COMMUNITY ORGANIZED
PROJECTS.**

******* DO NOT BECOME A BANK! *******

TAKE ACTION AND AVOID JUST HANDING OUT MONEY.

IF YOU DONATE BOOKS, VOLUNTEER TO READ.

**IF YOU FUND A TEACHER WORKSHOP, VOLUNTEER TO PROVIDE
A LUNCHEON FOR THE TEACHERS.**

**IF YOU SPONSOR A WALK-A-THON, VOLUNTEER TO ORGANIZE
A PIONEER TEAM.**

WE ARE A VOLUNTEER ORGANIZATION.

WHO ARE TELECOMPIONEERS?

VOLUNTEERS!

EDUCATION MISSION

EDUCATION MISSION

Our guiding mission as Pioneers is EDUCATION and LITERACY

This is both a Pioneer and Corporate goal.

PIONEERS:

A BOOK ABOUT ME

SMART BEARS

READ-TO-ME KITS

SCHOLASTIC BOOKS PROGRAM

JUNIOR ACHIEVEMENT

CORPORATE:

**VERIZON - VERIZON READS, SEASON'S READINGS
JUNIOR ACHIEVEMENT, SCHOLASTIC**

**FRONTIER – COMMUNITY SERVICE & EDUCATION
INITIATIVES**

**TELCORDIA – COMMUNITY SERVICE & EDUCATION
INITIATIVES**

COMMUNITY SERVICE

COMMUNITY SERVICE

In addition to education & literacy, as Pioneers and Corporate Volunteers we provide Community Service.

Education & Literacy walk hand-in-hand with Community Service.

Heart of Pioneering initiatives:

✓ **Hug-a-bears, Heart Pillows, Lap Robes**

Teach a child to sew or knit.

Teach elders at Nursing Homes.

✓ **Habitat for Humanity, State Park Access**

Educating others on the use of tools, measuring, building and teamwork.

✓ **911 Simulator**

Educating children and seniors on proper use of 911.

✓ **Map Painting**

Educating children about their country.

Other examples:

Playing Bingo at a Veterans Shelter or Nursing Home

Providing dinner at a local shelter

Stocking the local food pantry from a food drive

Holiday gift giving for those less fortunate

...and the list goes on.

WHAT GUIDES US?

➤ **TELECOMPIONEERS (TP ASSOCIATION)**

- 2003 TP Guidelines (CD provided)
- Robert's Rules of Parliamentary Procedure
<http://www.robertsrules.com/>

OR

<http://www.constitution.org/rror/rror--00.htm>

➤ **VERIZON – FRONTIER – TELCORDIA**

Corporate Guidelines and Initiatives

WHAT IS YOUR CHAPTER'S PURPOSE?

The purpose of your Chapter and subordinate units (Councils and Clubs) shall be to carry on Pioneer activities for the membership within your jurisdiction in accordance with the purpose of the Association. (Constitution and Bylaws)

RESPONSIBILITIES:

- ◆ Preside and call Meetings
- ◆ Enforce Constitution and Bylaws
- ◆ Interpret Practices and Procedures
- ◆ Interface with Company and Group
- ◆ Decide all questions of order subject to appeal
- ◆ Appoint Committees
- ◆ Member ex officio of Committees

Perform other duties that pertain to the office or delegated by your executive committee.

- Provide continuity for activities and programs
- Provide/oversee coaching and training
- Oversee activities of Treasurer and Audit committee
- Approve Bills & Cash Advances
- Develop Business Plan
- Develop Budget

CONDUCT MEETINGS

- GROUP LEVEL
Monthly Conference Calls
Face to Face
Key Operating Committees
Annual Meeting
- LOCAL
Chapter
Council
Clubs
Projects

◆ REPORTS

- **MINUTES**
Chapter, Council and Club
- **PROJECTS & ACTIVITIES**
Education, Community Service, Environmental, Heart of Pioneering, etc.
- **PA7**
Participation
Membership

CALENDAR OF EVENTS
5/2003-12/2003

MAY 2003

VALLEY FORGE, PA. TRAINING & RECOGNITION CONFERENCE

JULY 2003

SOME OFFICER CHANGES
DEADLINES FOR ASSOCIATION AWARDS
DISASTER RELIEF
PRESIDENT'S CLUB
MEMBERSHIP
PARTICIPATION
HEART OF PIONEERING
A BOOK ABOUT ME

JULY 2003

ANNUAL MEETING, HALIFAX NOVA SCOTIA

SEPTEMBER/OCTOBER 2003

GROUP MEETING-FACE-TO-FACE

CALENDAR OF EVENTS

5/2003-12/2003

OCTOBER 2003

LETTERS OF INTRODUCTION FOR NEW OFFICERS
DEVELOP 2004 BUSINESS PLAN & BUDGET

NOVEMBER 2003

LETTERS OF INTRODUCTION FOR NEW OFFICERS
SUBMIT 2004 BUSINESS PLAN & BUDGET FOR APPROVAL

DECEMBER 2003

INDUCTION OF NEW OFFICERS
CHAPTER YEAR-END MEETINGS
SUBMIT BUSINESS PLAN TO GROUP VP & ADMINISTRATION

CALENDAR OF EVENTS

1/2004-12/2004

JANUARY 2004

NEW PIONEER YEAR BEGINS

MARCH 2004

ASSOCIATION TRAINING FOR CHAPTERS

MAY 2004

AWARD DEADLINES
EDUCATION EXCELLENCE
PEOPLE WHO CARE
DISABILITY BETTERMENT

SEPTEMBER 2004

GROUP MEETING – FACE-TO-FACE

DECEMBER 31, 2004

TERM OF OFFICE ENDS

FUNDING YOUR CHAPTER

FUNDING YOUR PROJECTS

AND

FUNDING

➤ MEMBERSHIP

The GOOD

DUES ARE LONG TERM MONEY
PAYROLL WITHDRAWL
MEMBERSHIP DATABASE UPDATES

..... and the BAD

SHORT TERM EMPLOYEES
RETIREES DO NOT PAY
CORPORATE DOWNSIZING
NO BANK WITHDRAWL CAPABILITY

➤ **GRANTS**

- **VERIZON FOUNDATION**

- *VERIZON CORPORATE GRANT

- *CHARITABLE DOLLARS FOR EDUCATION PROJECTS,
VERIZON READS & SEASONS READINGS

(New) *DISTRIBUTED TO CHAPTERS THROUGH A NEW GRANT REQUEST PROCESS.

- *LINKED TO THE CHAPTER BUSINESS PLAN**

- *85% SHOULD BE USED FOR EDUCATION

- *15% CAN BE USED FOR FRATERNAL

- *MUST BE USED IN VERIZON CALENDAR YEAR 1/1-12/31

- *MUST REPORT TO VFT PIONEER VP IN NOVEMBER
WHERE \$\$ SPENT.

(New) *ACCOUNTING CENTER TRACKING REPORT FOR CHARITABLE GRANT EXPENDITURES.

- **PIONEER FOUNDATION - 501C(3)**

- *YEARLY GRANT

- *PIONEERS APPLY

- *\$\$ AMOUNT BASED ON CHAPTER CONTRIBUTIONS AND
MEMBERSHIP INVESTMENTS.

- *EDUCATION SPECIFIC GUIDELINES

- *VOLUNTEER REQUIREMENTS

- *GUIDELINES AND FORMS FOUND ON TP WEB SITE

- *REQUEST TO FOUNDATION BY 5/1.

(NEW) * DONATIONS/GRANTS BY CORPORATIONS TO TELECOMPIONEERS

- **DODDS FUND**

- *YEARLY GRANT

- *PIONEERS APPLY

*HEARING IMPAIRED - SPECIFIC GUIDELINES
*\$\$ AMOUNT AVAILABLE BASED ON PROFITS FROM
ENDOWMENT.

*CHAPTER MUST MATCH AMOUNT REQUESTED

*WRITTEN REQUEST TO ADMINISTRATIVE CENTER
BY 10/1.

- **EXTERNAL ORGANIZATIONS**

- *LIONS CLUB & ABAM

- **EXTERNAL GRANTS**

- *NUMEROUS WEB SITES

- *RESEARCH AND TRY

- *USE OTHER FUNDED GRANTS AS EXAMPLES

- EX: http://www.schoolgrants.org/grant_opps.htm

Foundation Opportunities:

[Carnegie Foundation](#)

The Carnegie Foundation supports education in the areas of early childhood education, urban school reform, and higher education. A major goal of the Foundation is to help rebuild the public's confidence in the education system, focusing not only on educational achievement at the pre-college level but at the college and university level as well. Carnegie does not fund individual schools or preschools. Many of the grants awarded by the Foundation go to the **greater New York City area** but many awards are also made nationally. The first step to obtaining funding from Carnegie Foundation is by submitting a letter of inquiry that briefly describes your program. There are no deadlines. See the website for additional information.

[Clorox Foundation](#)

The Clorox Foundation makes grants in Oakland, CA and in areas where company facilities are located* (See [Where to Apply](#).) Their Education and Youth Development focus supports programs that improve academic performance, prepare youth for the world of work and community leadership, and promote positive relationships among youth from diverse cultural and ethnic groups. Proposals must answer specific questions that are listed on the Foundation's Web site: <http://www.clorox.com/company/foundation/how.html> Application deadlines are **July 1, October 1, January 1, and April 1**.

*Clorox has company facilities in cities located in Arkansas, **California**, Florida, Georgia, Illinois, Kansas, Kentucky, **Maryland**, Missouri, Nevada, **New Jersey**, Ohio, Oregon, Texas, **Virginia**, **Vermont**, and **West Virginia**.

[MetroWest Community Health Care Foundation](#)

The Foundation's MetroWest Youth Initiative supports programs designed to keep children and adolescents in the MetroWest area* healthy and safe. Grants will be made to support new, innovative or expanded programs that deal with such issues as injuries and violence; child abuse; oral health care; asthma; depression and suicide; alcohol and substance abuse; access to health services; and health promotion and disease prevention.

Proposals must show community collaboration. Types of grants made include project/program support, capacity building, community education, research and evaluation, and demonstration or pilot projects. Grants are usually around \$50,000. Due dates are September 7, 2001 and January 7, 2002.

*Grants are made in the following Massachusetts communities: **Ashland, Bellingham, Dover, Framingham, Franklin, Holliston, Hopedale, Hopkinton, Hudson, Marlborough, Medfield, Medway, Mendon, Milford, Millis, Natick, Needham, Norfolk, Northborough, Sherborn, Southborough, Sudbury, Wayland, Wellesley, and Westborough**.

[Dollar General Literacy Foundation](#)

Since 1993, the Dollar General Literacy Foundation has increased the functional literacy of adults by providing grants to non-profit organizations dedicated to the advancement of literacy. The Dollar General Literacy Foundation supports non-profit organizations within Dollar General's market area that are established for public use and have an active 501(c)(3) status under the Internal Revenue Service Code.

Eligible organizations within the Dollar General market area must be committed to increasing the functional literacy of adults or families and must provide direct literacy services within their community.

The Dollar General Literacy Foundation welcomes proposals from non-profit literacy providers on an annual basis. The Foundation's Request for Proposals (RFP) will be available **February 28, 2003** with a submission

deadline of **April 4, 2003**.

To place your name on the RFP mailing list for future RFPs, send your organization's name, contact name, and mailing address to The Dollar General Literacy Foundation, P.O. Box 1064, Goodlettsville, TN 37072-1064.

Determine if Dollar General does business in your area by [clicking here](#). [R.R. Donnelley & Sons Company](#) Because R.R. Donnelley & Sons Company is a printing company they place a high emphasis on projects in the ir operating communities that focus on literacy efforts. They also assist many local agencies that deliver educational and social services, especially to children. To see if your community is eligible to apply for funding, <http://www.rrdonnelley.com/public/community/locations.asp>. Proposals are accepted at **any time between January 1 and November 1**.

Donnelley & Sons has operations in **California**, Colorado, Connecticut, Florida Illinois, Indiana, Iowa, Kentucky, **Massachusetts**, Mississippi, Nevada, **New York**, Ohio, Oregon, **Pennsylvania**, South Carolina, Tennessee, Texas, and **Virginia**.



VERIZON VOLUNTEERS

- MATCHING CORPORATE FUNDS
- VOLUNTEER HOURS
- 501C(3) ORGANIZATIONS BENEFIT
- REGISTRATION OF ORGANIZATION REQUIRED
- VERIZON VOLUNTEERS WEB SITE

➤ **ECOMMERCE**

- VERIZON PIONEER WEB SITE
- CHAPTER SPECIFIC SITES

➤ **MBNA**

- MBNA CREDIT CARD
- CDs, INVESTMENTS
- ABOUT 1% OF DOLLARS SPENT
- PROCEEDS ISSUED QUARTERLY TO CHAPTERS
- ADMINISTRATIVE CENTER PROCESSES DISTRIBUTION
- GET CARD AND USE IT FOR ALL PIONEER ACTIVITIES



LOCAL FUNDRAISING

- STORE SALES
- RAFFLES (off premise for VeriZon)
- VENDOR SALES
- LOTTERIES
- FOOD SALES

VERIZON EMPLOYEES ARE TO REMEMBER:

NO RAFFLES
NO LOTTERIES
NO GAMES OF CHANCE
NO ENTRIES IN MEMBERSHIP DRAWINGS

.....ON COMPANY PREMISES.

THIS IS CORPORATE POLICY. CHECK WITH THE ETHICS HOTLINE BEFORE ENGAGING IN ANY ACTIVITIES YOU ARE UNSURE OF.

VZ ETHICS HELPLINE (24/7) 1-800-856-1885

**SPEAKER: Rob Shamo, TelecomPioneer,
Association Account Representative for the VFT Pioneers.**

SUBJECT: GRANTS

“WHY SHOULD I BUY YOUR TEESHIRT INSTEAD?”

What are some of the reasons you, as a consumer, purchases one particular item over another?

Cheaper?

Better Quality ?

Accessibility?

Congeniality?

Knowledgeable?

Impulse?

Any others.....?

As a Fundraiser you need to “Know your Audience.”

What are their like & dislikes

What’s the theme/fad everyone is into (for the moment)

What’s the economic status of your audience?

What can the market bear?

What’s the draw?

“THE LEMONADE CHALLENGE” - EXERCISE

Your team has decided to be a Lemonade vendor at the local town fair this year. You have just learned that there will be 7 other Lemonade vendors at the park, and you will lose your \$1,000.00 deposit if you back out.

Your team has decided to take the Lemonade Challenge and continue with the project.

Here is the challenge:

Your team must develop a strategy to be the best and most lucrative Lemonade Stand at the town fair.

The following items should be included in your strategy.

COMPETITIVE PRICING

VALUE for the \$\$

QUALITY OF THE LEMONADE

MARKETING CREATIVITY

At the end of the exercise, each team will have an opportunity to present their strategy for being the best Lemonade stand at the town Fair.

Funding Review

- Name 5 potential ways a Chapter; Council or Club can fund their Business Plan Projects.

1. _____

2. _____

3. _____

4. _____

5. _____

- List a current project and tell how you fund it.

Project: _____

Funding: _____

- Describe an Internal Grant request

- Describe an External Grant request

FINANCIAL ACCOUNTABILITY

**SPEAKERS: DIANE NELSON, Administration Center Manager,
VFT TelecomPioneers**

JOANNE DEMPSEY, Finance Key Operating Committee

MAINTAINING A FINANCIALLY SOUND CHAPTER/COUNCIL OR CLUB

In order to maintain a financially sound Chapter, Council and Club, you must:

- **Have an accounting of your financial transactions on a Monthly basis.**
- **Interpret and understand financial report(s).**
- **Review information on a monthly basis**
- **Make corrections immediately**
- **Inform and work to correct individual groups who may be running in the red.**
- **Review accounting guidelines (Pioneer Finance Voucher)**

✓

BY HAVING YOUR FUNDS IN THE ACCOUNTING CENTER YOU WILL HAVE:

- 1. CONSISTENCY OF ACCOUNTING PRACTICES**
- 2. A CENTRAL PROCESSING CENTER**
- 3. AVAILABILITY OF REPORTS**
- 4. A STANDARD PROCEDURE ACROSS THE FOOTPRINT**
- 5. STANDARD TAX PREPARATIONS AND OBSERVANCES OF THE LAW.**
- 6. FINANCIAL REASSURANCE TO OUR SPONSORS & STAKE HOLDERS THAT THEIR INVESTMENTS ARE BEING HANDLED IN A PROPER AND LAWFUL MANNER.**

MEMBERSHIP, PA7 & RECOGNITION

**SPEAKER – Diane Rodger, VFT PA7 Coordinator,
VFT Webmaster**

MEMBERSHIP RECRUITMENT & RETENTION

Membership - Recruitment Tips

When seeking out volunteers for your organization, it is important to have defined what your organization has to offer. Volunteers are providing you with time, energy, creativity, and many hours of commitment. Because of this, volunteers deserve effort by you to be able to explain what your organization can offer them and how they will be needed and made an active part of your group. One way to make a volunteer feel welcomed is by having them complete a "first contact interest form."

An interest form serves two purposes:

- (a) provides a documented record for you to use in contacting the volunteer,
- (b) makes the volunteer feel wanted and needed.

To add to the "welcoming," consider having a group representative fill out the form as the questions are discussed. The form should request the following information:

Personal data such as name, address, telephone number and email address.

What the individual expects to learn from participation in the organization.

What the individual can contribute to the organization in terms of skills and experience.

The individual's ability to volunteer or attend meetings.

Information such as hobbies, special skills, availability and interest in sub committees, etc.

After acquiring information from the volunteer, it is now your group's responsibility to contact the potential member. Within one week of the initial meeting, the volunteer should be contacted. During this contact, the volunteer member should be informed of his/her role within the organization.

MEMBERSHIP RESOURCES:

WWW.TELECOMPIONEERS.ORG

- **MEMBERSHIP**
ACTIVE MEMBERSHIP: APPROXIMATELY 30, 000
LIFE MEMBERSHIP : APPROXIMATELY 75,000

- **MEMBERSHIP RECRUITMENT**

DIRECT MAIL
DIRECT EMAIL
WEB BASED
MEMBERSHIP TABLE AT EVENTS
JUST ASKING

TAKE A MOMENT TO JOT DOWN SOME IDEAS OF HOW YOU
RECRUIT MEMBERS.

Building Your Chapter/Council and Club Through Effective Goals

Qualities of a Successful Group

GOALS should be:

- achievable
- believable
- controllable
- desirable
- evaluated
- growth-facilitating
- measurable
- prioritized
- realistic
- time-bound
- understandable
- valuable

Goals are plans for the future. They are your direction for the year. They state what your group wishes to accomplish. Goals should be evaluated and changed from year to year.

Why set goals?

- To give direction, provide a course of action for your group
- To motivate members
- To clarify and communicate what your group is striving for
- To define your group
- To provide a basis to measure success and accomplishments
- To save time by allowing your group to plan and prepare for the future

Steps for setting goals

- Brainstorm goals as a group
- Evaluate past group successes and failures
- Address new things group wishes to accomplish
- Choose from the list those goals to focus on for the coming year
- Prioritize the chosen goals
- Break each goal into the steps necessary to reach it
- Move into action and begin working on goals
- Set timelines and deadlines for each step of the goal

Ask the following questions

- What is to be done?
- Now will it be accomplished?
- What are the resources available (people, money, materials)?
- Who will carry it through?
- When will it be accomplished?
- What results are expected and how will they be measured? Continually evaluate your progress
- Be flexible; allow your goals to change to meet new circumstances

Many groups fail to reach their goals because they don't follow through with the action stages of goal setting.

Tips that might help:

- Make your goals VISIBLE!
- Post them in the office
- Give a copy to every member
- Discuss them at meetings. Put them on the agenda
- Put them in newsletters and materials you send out

“ WHAT ARE YOUR GROUP’S GOALS FOR THE COMING YEAR?”

“ AND HOW WILL WE FUND THEM?”

VERIZON/FRONTIER/TELCORDIA/PIONEER OBJECTIVES

**OBJECTIVE CORPORATE PIONEERLITERACY/VERIZON READSABAM
READING/SEASONS READINGSSCHOLASTIC BOOKSEDCORPORATE READING
INITIATIVESMART BEARSREAD-TO-ME KITSPLAYGROUND MAPSJUNIOR ACHIEVEMENT
WORK FORCE DEVELOPMENTJUNIOR ACHIEVEMENTJUNIOR ACHIEVEMENTHABITAT
FOR HUMANITYEMPLOYEE VOLUNTEERISM
UNITED WAY`COLLECTIONS: FOOD, CLOTHING, GIFTSVERIZON VOLUNTEERSHUG-A-
BEARSHEART PILLOWSEASY ACCESSHABITAT FOR HUMANITYCOMMUNITY
TECHNOLOGY DEVELOPMENTCOMPUTERS FOR SCHOOLSWIRING IN SCHOOLSTALKING
BOOK REPAIR**

Goal Setting

Why is goal setting important?

Goals help describe success.

People tend to maintain expectations, not surpass them. Thus, expectations or goals should be challenging, yet within a person or group's grasp.

Goals create common tasks and processes.

By having them, a group knows what it has to do and can work together on the goals.

Goal setting can allow:

- clear and specific delegation of responsibilities
- greater freedom to operate
- better communication, both two-way and interpersonal
- greater job satisfaction
- more diversity of services and programs, by updating and improving old programs and developing new ones
- identification of individual and organizational strengths and weaknesses
- fair and easy appraisal and evaluation of the organization
- clarification and/or development of an organization's mission or philosophy better morale

Although goal setting is rewarding, some difficulties do exist:

- It is sometimes difficult to quantify and qualify what goals or actions should be.
- Goal setting takes time. Initially the members must be introduced to the process, develop necessary skills, implement procedures and record evaluations.
- Goal setting can be a giant verbal game of paper shuffling and exercise. The process can be easily distorted.

How does one develop effective goals?

Think about the future. If you are developing group goals, try to think of at least two ways to describe the future through the group's or members' tasks or purposes.

Use our MISSION statement. A Mission Statement defines what the goals need to be and then these goals can be adjusted each year.

Use the suggestions. By being open to feedback, one can get new ideas for goals.

Process for brainstorming goals:

- Allow ideas to start goals.
- Members should begin to talk about what they would like the group to accomplish.
- Let every member take part in the brainstorming. This is important for morale and cohesion. Also, members are more likely to support what they help to create.
- Unrealistic goals should not be weeded out until later.
- When finalizing the goals, make sure that they are measurable.

After Brainstorming, prioritize the goals:

Place goals in order of importance. This can be difficult, because each member has individual ideas of what is important for the group.

Have members rank the goals on their own and then share their ideas with the group to reach consensus.

Break into small groups to prioritize goals concerning different segments of the organization.

After goal setting, develop plans to achieve the goals so that they are more than nice words.

Develop an Action Plan: If you have more than one objective, start with the one that the group considers the most important or complex. Develop a detailed plan for fulfilling the objective by the target date.

Identify what information not already available is needed to meet that objective.

Identify the steps needed to accomplish the goal.

Put the steps needed in the order they need to be done.

Determine what individuals or groups in the organization will be involved in the implementation of the plan. Then decide who will be responsible for what phases of the action plan.

Set a deadline for each step.

Evaluate the goals or the people doing them periodically to check their progress and make sure members are working to achieve them.

Conduct an evaluation of the goals by the end of the year. From that evaluation, make recommendations for next year's group.

By setting goals, developing action plans, working to fulfill them, and evaluating the process, you and your organization will be more likely to succeed in your tasks.

BUSINESS PLAN STATEMENTS

- 1. Support (READING PROGRAM) initiative by coordinating the annual book collection in 5 company locations.**
- 2. Support (READING PROGRAM) by increasing the 2004 annual book collections by 15% (96 books) in 2004.**
- 3. Support (READING PROGRAM) by coordinating a Scholastic Book Fair at a school. Volunteers will assist with the sales.**
- 4. Support (READING PROGRAM) by developing a Pioneer Reading Day or partnering on Community Reading Day. Purchase 100 Scholastic or ABAM books for 3 - 2nd grade classes at the ??????? school.**
- 5. Support TelecomPioneers Heart of Pioneering objectives by sewing (X-amount) of Hug-A-Bears to meet/exceed Chapter membership objective and distribute to (X-amount) to local fire, police, ambulance and EMT locations.**
- 6. Support TelecomPioneer Heart of Pioneering objectives by increasing the amount of ABAM books delivered by 15% (100) for 2004.**
- 7. Support TelecomPioneer Heart of Pioneering objectives and Corporate Education initiatives by coordinating a sewing group to make 100 Smart Bears and distribute to Good Child Daycare Center in Anytown.**

BUSINESS PLAN DEVELOPMENT

- **VERIZON/TELCORDIA/Frontier CORPORATE OBJECTIVE**

1.

2.

3.

4.

5.

- **TELECOM PIONEER OBJECTIVES**

1.

2.

3.

4.

5.

BUSINESS PLAN DEVELOPMENT

The following objectives are ones which the _____
Chapter of TelecomPioners will align themselves during 2004.

<input type="checkbox"/> LITERACY/EDUCATION	TOTAL: \$ _____
<input type="checkbox"/> COMM. SVC./EMP. VOL.	TOTAL: \$ _____
<input type="checkbox"/> WORKFORCE DEVELOPMENT	TOTAL: \$ _____
<input type="checkbox"/> COMMUNITY TECHNOLOGY DEV.	TOTAL: \$ _____

PROJECT NAME: _____

BUSINESS STATEMENT:

PIONEER ALIGNMENT:

CORPORATE ALIGNMENT:

FUNDING SOURCES:

FUNDING RESOURCES

- 1. DUES**
- 2. CORPORATE GRANT**
- 3. MBNA**
- 4. PIONEER GRANT**
- 5. DODDS FUND GRANT**
- 6. EXTERNAL GRANT SOURCES**
- 7. CHAPTER/COUNCIL/CLUB FUNDRAISING**
- 8. E-COMMERCE**
- 9. VERIZON VOLUNTEERS-MATCHING PROGRAM**
- 10. EXTERNAL PARTNERSHIPS**

VERIZON GRANT REQUEST PROCESS

WHY:

STANDARD EXPENDITURE PROCESS

TIED TO BUSINESS PLAN

CENTRAL PROCESSING CENTER

AVAILABILITY OF IMMEDIATE ON-LINE EXPENDITURE REPORTS

**PROVIDE FINANCIAL REASSURANCE TO OUR SPONSORS & STAKE
HOLDERS THAT THEIR PHILANTHROPIC FUNDS ARE BEING SPENT
BASED ON THEIR EXPECTATIONS.**

GRANT REQUEST PROCESS

- 1. Business Plan is developed**
- 2. Funding is identified**
- 3. Pioneer Finance Voucher is submitted**
- 4. Grant request is reviewed for match with Business Plan**
- 5. If APPROVED – funds are transferred to (Project Name) for the Chapter requesting the funds.**

If NOT APPROVED – Grant is sent back to the requesting Chapter with an explanation why it is being rejected.

- 6. Project Completion form is filled-out, accompanied by receipts, and sent to the Accounting Center to close out that account, transfer any money back to the Chapter Grant Account and provide data for the Verizon Grant Reports.**

(FORM HAND-OUT)

WHAT MAKES A GOOD LEADER?

WHAT MAKES A GOOD LEADER?

Please take a few minutes to identify five recent and well known leaders, and point out the characteristics of each that, you believe, enabled them to be good leaders.

1. _____

2. _____

3. _____

4. _____

5. _____

CRITICAL BEHAVIORS OF SUCCESSFUL LEADERS:

Be a Facilitator, not a Dictator

Trust your followers

Respect them

Give special attention as needed

Let them know what is expected of them

Give them the tools, training, and support they need

Offer coaching or assistance

Correct or criticize in private

Praise and recognize in public

Appreciate their efforts

Help them grow and develop in knowledge and skills

Keep them informed

Treat everyone fairly.

CHOOSING A LEADER – EXERCISE

Now that we have discussed what qualities we feel make a good leader, let's brainstorm the criteria we wish to use to evaluate one candidate from another when choosing that leader. Remember, there may be some basic leadership qualities and also ones that may be specific to choosing a leader for the Chapter, Council or Club.

Instructions:

- 1. Move into your teams.**
- 2. Discuss the criteria that your Chapter/Council/Club will use to evaluate leadership candidates.**

20 REASONS WHY MEETINGS GO WRONG:

1. Getting off the subject
2. No goals or agenda
3. Too lengthy
4. Poor or inadequate preparation
5. Inconclusive
6. Disorganized
7. Ineffective leadership / lack of control
8. Irrelevance of information discussed
9. Cancelled or postponed meetings
10. Starting late
11. Not effective for making decisions
12. Interruptions from within and without
13. Individuals dominate / aggrandize discussion
14. Rambling, redundant, or digressive discussion
15. No published results or follow-up action
16. No pre-meeting orientation
17. Too much to do
18. Everyone not present
19. No one contributing
20. No one pays attention

Meetings - General Guidelines

7 types of meetings:

1. Information-sharing-communication
2. Diagnostic or fact-finding
3. Brainstorming
4. Decision-making
5. Planning
6. Coordination and monitoring
7. Ongoing business

Before the Meeting:

Decide on the goals of the meeting

Choose a time and date for the meeting

Choose a location for your meeting

Notify the participants

Prepare a written agenda

During the Meeting

Initiate the discussion

Guide the direction of meeting

Ensure that all group members have an equal opportunity to participate

Encourage members to think both critically and creatively

Promote understanding between the members of the group

Recognize and resolve conflicts within the group

After the Meeting:

Distribute copies of the minutes

Follow up with members of the group

Evaluate both the meeting and your performance

17 Steps to More Successful Meetings

BEFORE THE MEETING:

1. • Plan the meeting carefully: who, what, when, where, why, how many.
2. • Prepare and send out an agenda and related materials in advance. Allow time for feedback on agenda items prior to meeting date.
3. • Come early and set up the meeting room.

AT THE BEGINNING OF THE MEETING:

4. • Start on time!
5. • Get participants to introduce themselves and state their expectations for the meeting. Circulate a sign-in sheet to collect names, addresses, phone numbers and group representation.
6. • Clearly define roles.
7. • Review, revise and order the agenda set clear time limits. Set ending time
8. • Review action items carried over from the previous meeting.

DURING THE MEETING:

9. • Focus on the same problem in the same way at the same time.

AT THE END OF THE MEETING:

- 10. • Establish action items: who, what, when.
- 11. • Review the group's meeting record.
- 12. • Set the date and place of the next meeting and develop a agenda.
- 13. • Evaluate the meeting.
- 14. • Close the meeting crisply and on a positive note.
- 15. • Clean up and leave the room in the manner in which you found it.

AFTER THE MEETING:

- 16. • Prepare for the group a memo summarizing agreements and action items.
- 17. • Follow-up on action items and begin to plan the next meeting.

End of meeting survey:

1. Were you interested in this meeting?

- Very much
- Quite a bit
- some, but not much
- Very little

2. Did you feel that this group was interested in this meeting?

- Very much
- Quite a bit
- some, but not much
- Very little

3. Did you learn any new facts or get any new ideas?

- Yes, many
- Quite a few
- some, but not much
- Very little

4. Did you change any of your previous opinions as a result of this meeting?

- Yes, many
- Quite a few
- some, but not much
- Very little

5. Were your previous opinions conformed or strengthened?

- Yes, many
- Quite a few
- some, but not much
- Very little

6. Did you think the group accomplished anything as a result of this meeting?

- Certainly did
- Probably did
- I doubt it did
- It did not

7. Was there enough preparation for the meeting?

- More than needed
- All that was needed
- Should've been more
- Should've been much more

8. Was there enough opportunity for discussion?

- Too much
- All that was needed
- Should've been more
- Should have been much more

9. Would the meeting have been better if some parts had been left out?

- Certainly not
- Probably
- Definitely
- Maybe

10. Did you find the social atmosphere of the meeting congenial and enjoyable?

- Excellent
- Quite good
- All right
- Definitely Not

11. Do you have suggestions for improving future meetings?

- Order of the Meeting
- Call to Order
- Roll Call
- Reading and Approval of Minutes
- Reports of Officers, Boards and Standing Committees
- Reports of Special Committees
- Unfinished Business
- New Business
- Ceremonies
- Adjournment
- Entertainment

An Effective Meeting has the following:

Desired outcomes

Clear purpose

Clear roles of Individuals

Room set up

Decision-making power

Process tools

Shared Responsibility

Follow-up accountability

Agenda

Good use of time

Preparation

Unbiased leader

Total Involvement

Real Issues

Diverse opinions

Evaluation

EXECUTIVE BOARD MEETING

_____ CHAPTER # _____

LOCATION: _____ DATE _____

**CALL TO ORDER
PLEDGE OF ALLEGIANCE
MOMENT OF SILENCE
PIONEER MISSION
INTRODUCTION OF GUESTS
COMMUNICATIONS
FINANCIALS
GRANTS
COUNCIL
PRESIDENT'S REPORT
COMMITTEE REPORTS
MEMBERSHIP
FUNDRAISING
EDUCATION
PARTICIPATION
COMMUNITY SERVICE
ENVIRONMENTAL
FELLOWSHIP/
ENTERTAINMENT
GROUP REP/
PUBLICITY
NOMINATING
LIFE MEMBER REPORTS
PROJECTS
NEW BUSINESS
REMARKS FROM GUESTS
ADJOURNMENT**

10 Steps to Committee Success

1. The committee must **have a purpose** which the members know and understand.
2. Committee members **must be selected with care**. A diverse group of individuals should be represented to meet the needs of the population.
3. Committee members should **be informed** about expectations, duties and responsibilities. A strong team spirit should be created among the members and each member needs to realize his or her responsibility for the group's success.
4. A **regular meeting time should be established**. A designated time will enable members to include the meeting as an important part of their schedule.
5. The meeting should **always start on time**. Starting on time shows respect for the members who arrive early; late comers will get the point.
6. **Notify every member** when special meetings are called. Leaving a member out of a discussion causes hard feelings and can erode the team spirit. Always include everyone.
7. An agenda should be planned for each meeting. For meetings to run efficiently and effectively, the chairperson needs to **plan every meeting in advance**. However, allow for flexibility and change.
8. **Delegate responsibilities** by assigning specific job functions to each committee member. Each individual wants to be needed and feel he or she is making a valuable contribution.
9. **Keep in touch** with the committee members at all times. Check with members between meetings to see if they need help or encouragement.
10. **Give praise and/or constructive criticism** to committee members on a regular basis. Members need to receive feedback as to how they are doing. Do so in a positive, reinforcing manner.

The eight steps to processing a main motion:

- 1. Obtaining the floor**
- 2. Assigning the floor**
- 3. Making the motion**
- 4. Seconding the motion**
- 5. Stating the motion**
- 6. Discussion/debate**
- 7. Taking the vote**
- 8. Announcing the vote**

PRESIDENTIAL DUTIES AND FUNCTIONS

1. Appoint Committees and Committee Chairpersons
2. Assign Executive Board Members responsibilities and duties.
3. Arrange, prepare and conduct appropriate meetings.
4. Develop Chapter performance objectives and plans in all performance areas for the upcoming year.
5. Develop a fiscal budget for review and approval.
6. Communicate regularly on objectives, issues, directions and other information appropriately to, but not limited to:
 - Executive Committee members
 - Councils
 - Clubs
 - Sponsors
 - Corporate Liaisons
 - Sponsoring Company Employees, and so forth.
7. Plan and execute an effective annual Chapter assembly
8. Attend and participate in Council and Club meetings, workshops, work parties, fundraisers, award ceremonies, etc. to the degree that other duties and responsibilities will permit.

This visibility and accessibility is necessary for the President to carry out successfully many of the his/her other responsibilities and duties.
9. Develop strong working relationships with each member of the Chapter Executive Committee, the Chapter Administrator (if applicable), Chapter Sponsors, Corporate Liaisons and the VFT Pioneer Vice President.
10. Work with the Nominating Committee to assist in the identification and selection future Chapter and Council Officers.

LEADERSHIP TRANSITION

◆ OUTGOING PRESIDENT'S ROLE:

1. Provide support to the new incoming President & Vice President; DO NOT do the job for them. They are the leadership team, let them learn & shine with your guidance.
2. Provide the following computer information:
 - ◆ Logins & Passwords to PA7, Chapter Web Site and any other computer system used to run the Chapter, Council or Club.
 - ◆ Email Passwords
3. Provide the following for the Pioneer Office & Store:
 - ◆ Office and Store Keys
 - ◆ Answering Machine directions & passwords
 - ◆ Code for opening any safes
4. Relinquish all Office duties such as:
 - ◆ Opening Mail
 - ◆ Answering voice messages.....Unless you are given the authority by the new President.

INCOMING PRESIDENT'S ROLE:

1. Call on Past Presidents when questioning policy, procedure or decisions that affect the Chapter.
2. Obtain the following:
 - Logins & Passwords to PA7, Chapter Web Site and any other computer system used to run the Chapter, Council or Club.
 - Chapter Email Passwords
 - Change Passwords where necessary to maintain secure information.
3. Obtain the Pioneer Office & Store Keys,
 - Answering Machine directions & passwords, code for the safe.
 - Change passwords where necessary to maintain security
4. Be clear that all Office duties such as opening mail answering voice messages, etc is the responsibility of the President, unless they choose to give that authority to someone else.

SECURITY

CODE OF CONDUCT

LIABILITY

- **SECURITY**

COMPUTER SYSTEM ACCESS

Logons & Passwords

EMAIL

Logons & Passwords

Group Lists

- **CODE OF CONDUCT**

CONFIDENTIALITY OF INFORMATION

Federal Privacy Act –

Organizations depend on information contained in their databases which typically consists of "personally identifiable information" they have collected on members and employees. With the growing number of laws regulating collection and use of such information, privacy management has become an imperative for every organization. The challenge is to know how to effectively manage the process of privacy management.

“WHAT CAN YOU DO TO MAKE SURE RECORDS AND INFORMATION REMAIN CONFIDENTIAL?”

-

LIABILITY

(NEW) Insurance Guidelines from TP

UPDATE **NEW INSURANCE PROGRAM**

TO: All Chapters, Councils & Clubs

FROM: TelecomPioneers
Finance Department

Since mid February, we have all attempted to understand the NEW “blanket” insurance policy issued to the Pioneers. Now, with some experience with our new insurance company, we believe that some clarification will assist you in planning your Pioneers events.

Most facilities requiring a Certificate of Insurance from you are asking for “proof” of insurance. This is a simple “Certificate of Insurance” and with no further specific requirements, our insurance company provides these with no additional charge.

Some facilities will be more specific and request that they be “named” as “Additional Insured.” Generally the type of facility requiring to be “named” is a municipality (City or County) or a Parks and Recreation Department.

Naming “Additional Insured” can be an additional cost for your group. To date, we have had a few of these and the cost has been \$50.00. However, each application is evaluated separately, which may carry a different charge.

EVENTS WHERE ALCOHOL IS AVAILABLE

An UNLIMITED CASH BAR will require additional Special Event insurance coverage. This can be requested through our insurance company or through an insurance company in your local area. This coverage can cost \$1,500 or more.

If your event is SELLING alcohol (i.e. a Beer Booth at a fair), then a Special Event insurance policy will be required. As early as possible, your chapter, council, or club will need to submit a "Certificate of Insurance Request" and an "additional information" form that provides more detailed facts about your event. These will be evaluated by the insurance company, and, if necessary, a quote for Special Event insurance will be provided. You will be able to compare this with insurance coverage you might buy locally.

For both of the above circumstances, our insurance agent will review your application and may phone or e-mail you for further information to assist in determining what coverage is needed and the cost to you for that coverage.

If your event is selling TICKETS to a breakfast, lunch or a dinner package and alcohol consumption is LIMITED, then a Certificate of Insurance can be provided. This Certificate states only that Pioneers have insurance coverage (proof of insurance). Many facilities that are used for Pioneers' events are asking ONLY for this Certificate. It will be necessary to complete the Certificate of Insurance request form as well as the additional information form for these events.

REMINDER: For ANY event serving alcohol, the Chapter, Council, or Club MINUTES MUST reflect your decision. The President will need to sign a statement to that effect and will be personally liable if there is a violation resulting in an incident.

ATHLETIC EVENTS

If the facility where your event is being held requires a Certificate of Insurance ("proof" of insurance), this will be provided. However, it is important to note that the Pioneers "blanket" insurance policy does **not cover any medical payments.**

Again, if something other than "proof" of insurance is required by the facility, you can submit the Certificate of Insurance request and the "additional information" forms and our insurance company can evaluate your event. You will be advised what coverage might be available to you and the cost to you for that coverage. You will then be able to compare that with coverage you might purchase locally.

THEFT COVERAGE

Under the new policy, only ELECTED chapter, council, club officers (Past President, President, Vice President, Treasurer and Secretary) are covered.

There is \$5,000 deductible before coverage even begins. Thereafter, only the next \$20,000 is covered. Note that forgery is the same as theft.

Be very careful who handles your money. Keep in mind that "Bonding" is available if someone other than an ELECTED officer is appointed to handle money for an event. This will cost you some, but could also save you cost in the long term. Having "checks and balances" policies in effect for your group can be very helpful to provide structure as to how funds are handled.

CERTIFICATE OF INSURANCE REQUEST**CHECK ONE:**"Proof of Insurance" or"Additional Insured"**REQUESTED BY:**Chapter #: Chapter Name:Contact Name: Telephone #: Fax #: Address: Event Name: Event Date: Event Location: Original Certificate should be mailed to: Entity Requiring Certificate: Address: Special wording requested by Entity Requiring Certificate:(Additional Insured **Only**)(May be additional charge)**PLEASE FAX TO ASSOCIATION HEADQUARTERSATTN: FINANCE DEPARTMENTFAX #: (303) 572-0520PHONE #: (303) 571-9268TelecomPioneers930 15th Street, 12th FloorDenver, CO 80202SPECIAL EVENT QUESTIONNAIRE FORM for INSURANCE**Description:Date(s):Time:Number of participants:Revenue Generated:Number of Volunteers:Swimming: YesNoIf YESAre lifeguards on duty?YesNoAre they hired by insured?YesNoAre they lifeguard certified?YesNo Certificate received?YesNoIs alcohol being served?YesNoIf YESAre bartenders hired by -- -InsuredYesNo -Place Event i heldYesNoAre bartenders trained in T.I.I.P.P.S.?YesNoHow is drinking limited (Example: Are tickets given out?)Is a sporting activity being played?YesNoIf YESWhich sport?Are participants required to sign a waiver?YesNoDo participants have to show proof ofYesNo personal health insurance?(Participants are currently excluded under standard Gen'l Liability)Are safeguards in place toYesNo prevent injury to spectators?

HOW WOULD YOU TREAT THE FOLLOWING SITUATIONS?

In each of these scenarios, you are the current Chapter President.

- 1. The Chapter secretary refuses to turn over the current AOL logons & passwords to the Chapter website.**
- 2. The Past President has continued to open mail labeled for the President and answer messages intended for the current President without the current President's consent.**
- 3. A paid assistant refuses to sign a work contract defining the hours to be worked and a requirement that timesheets be signed each week verifying hours to be paid.**
- 4. The Membership Database input person has been accused of revealing confidential information about a member.**
- 5. Alcohol was served at a Pioneer event without an Insurance binder or Waiver being signed.**
- 6. A member of the Board was found to be signing the President's signature on a TP2 form without the President's knowledge. The funds were to pay for an approved project.**

PIONEER PLANNING YEAR – 1/1-12/31

MONTH/CHAPTER ACTIVITY/VFT GROUP JANUARY MONTH PLANNING SESSION

CHAPTER TRAININGPOST NEW CHAPTER ORG CHARTS ON WEB

MONTHLY CCFEBRUARYORDER TREES FOR APRIL-ARBOR DAY CELEBRATION
MONTHLY CCMARCHPLANNING SESSION FOR YEAR-END MEETING(S)

TP CONFERENCE/TRAINING ANNUAL MEETING

APRILARBOR DAY CELEBRATIONS
PLANT TREES, HAND OUT SEEDLINGS, ETC.

NAT'L VOLUNTEER WEEK

MONTHLY CCMAYMAP PAINTING

MONTHLY CCJUNEMID-YEAR MEETING

SUMMER PROJECTS

MONTHLY CCJULY6 MONTH PLANNING SESSION

SUMMER PROJECTS

MONTHLY CCAUGUSTBACK TO SCHOOL COLLECTIONS

LITERACY/READING CAMPAIGN

MONTHLY CCSEPTEMBERREADING PROGRAMS BEGIN

PIONEER WEEK PLANNING

WRITE-UPS FOR TP AWARDS GROUP MEETING

OCTOBERDEVELOP NEXT YEAR'S BUSINESS PLAN

BEGIN PLANNING FOR HOLIDAY ACTIVITIES

SAFE HALLOWEEN CAMPAIGNVFT CHAPTERS MTG

DETERMINE DELEGATES FOR ANNUAL MTG

MONTHLY CCNOVEMBERTHANKSGIVING FOOD DRIVEVERIZON GRANT- REPORT OF \$\$ SPENT

MONTHLY CCDECEMBERHOLIDAY TOY/GIFT DRIVE
LITERACY/READING CAMPAIGN

MONTHLY CC

PROJECTS CHECKLIST

The items on this list are just some of the things you must think of when undertaking any kind of project. The boxes to the left of each item can be used as a checklist to document items to be considered in the planning and completion of tasks.

PROJECT NAME: _____

- ADVANCE SET-UP
- ADVERTISING (INT/EXT)
- APPROVALS
- BENEFICIARIES
- CAMERAS
- CASHIER/CASH
- CEREMONY PREP.
- CLEAN-UP COMMITTEE
- DIRECTIONS
- DONATIONS
- ENTERTAINMENT
- FELLOWSHIP
- FUNDING
- FUND RAISING
- EQUIPMENT/TOOLS
- FACILITIES (REST ROOMS)
- HOURS TRACKER
- LIABILITY INSURANCE
- LODGING
- MATERIALS
- OUTSIDE GROUP INVOLVEMENT
- PARKING
- PEOPLE POWER
- PERMITS
- A PLAN
- POWER (ELECTRICITY/WATER)
- PROJECT CHAIR
- PROJECT COMMITTEE
- PUBLICITY (INT/EXT)
- RECOGNITION/AWARDS
- REFRESHMENTS
- SECURITY
- SOUVENIRS
- SPECIAL GUESTS
- SPECIAL SKILLS PEOPLE
- THANK YOUS
- TIME COMMITMENTS
- TIME CONSTRAINTS
- TRANSPORTATION
- WEATHER/ALT. DATE

COMMUNICATE – COMMUNICATE – COMMUNICATE

COMMUNICATE – COMMUNICATE – COMMUNICATE

In this day of electronic communication, we are dealing with a litany of emails from our work to our home. The VFT Pioneer VP uses email to communicate information to the Chapters and it is expected that the Chapters use this form of communication with it's Councils and Clubs.

➤ EMAIL IS OUR #1 FORM OF COMMUNICATION

VP<->CHAPTERS<->COUNCILS<->CLUBS<->MEMBERSHIP

COLLECT EVERYONE'S EMAIL

ENCOURAGE CLUB OFFICERS TO GET EMAIL

✓ **LOOK AT AND RESPOND TO YOUR EMAIL
EVERY DAY!**

PIONEER WEB SITES

TELECOMPIONEERS
WWW.TELECOMPIONEERS.ORG

VERIZON PIONEERS
WWW.VERIZONPIONEERS.ORG

TELCORDIA PIONEERS
WWW.TELCORDIA.COM
(click on About Us/Who We Are)

CONTACT INFORMATION

➤ TELECOM PIONEERS

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➤ VERIZON ACCOUNTING CENTER

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➤ VFT VICE PRESIDENT

Cal Frost
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➤ CURRENT VERIZON CHAPTER ORGANIZATION CHARTS

WWW.VERIZONPIONEERS.ORG

➤ CURRENT TELCORDIA CHAPTER ORGANIZATION CHARTS

WWW.TELCORDIA.COM (CLICK ON ABOUT US/WHO WE ARE)

➤ KEY OPERATING COMMITTEES (www.verizonpioneers.org)

ADMINISTRATIVE

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COMMUNICATIONS

TO BE DETERMINED

THANK YOU VERY MUCH!

On behalf of the Verizon Pioneer leadership team, I would like to thank all the participants of the President's Training for giving so generously of their time, knowledge and ideas.

This is what truly makes up a successful Pioneer team.

We look forward to working with all of you as the year progresses and as we share our challenges and successes.

Enjoy the remainder of the Conference and we wish you the best of luck as your year begins.