



BUSINESS REFERRAL GROUPS

Agreement

I. Mission

To generate business opportunities for Elk Grove Chamber members through building and strengthening professional relationships in a non-competitive and mutually supportive environment.

II. Organization

The Business Referral Groups is a program administered by the Elk Grove Chamber of Commerce for the sole benefit of its membership, and as such, is subject to such regulation as deemed appropriate by the Chamber's Board of Directors.

- A. Actions of the group are to be communicated to the Elk Grove Chamber in a timely manner. Statistics are to be sent monthly to the Chamber staff coordinator.
- B. All applications for Referral Group membership must be received by the Chamber office with payment prior to acceptance to a Referral Group.
- C. The Elk Grove Chamber and the Referral Group Leadership team will work together to enforce these guidelines.
- D. Any disputes regarding these guidelines are to be submitted in writing to the Elk Grove Chamber office in a timely manner.
- E. The Elk Grove Chamber reserves the right to revoke membership or disband groups as needed for the overall success of the program
- F. Membership may be revoked by Chamber staff for failure to comply with the policies and/or the Code of Ethics of BRG

III. Groups/Schedule

All groups meet at least twice a month at the Chamber Office at a regularly scheduled, mutually convenient time established with the Chamber staff coordinator.

IV. Member Qualifications

- A. Only one person from any given professional category or classification is permitted to join a BRG. Members must represent their (1) "Primary" category representing 70% of their business and not a part-time business. In order to represent a category in a Referral Group the member must be listed under that category with the Chamber.
Members who wish to change their professional classification or category must submit a new membership application and obtain approval from the leadership team prior to giving an infomercial or presentation regarding the new classification or category.
- B. Any business/organization representative seeking membership in a Referral Group must:
 1. Be an official representative of a business/organization which is an active and current member in good standing of the Elk Grove Chamber of Commerce.
 2. Be deemed qualified and cleared of conflicts by the Chamber's Referral Group coordinator.
 3. Be presented to and approved by the respective group's Leadership Team to ensure there is no conflict among the current membership.
 4. The Leadership Team, in consultation with the Chamber Referral Group coordinator, will have final determination on potential conflicts.

5. A member who wishes to transfer from one chapter to another must submit a new membership application to the leadership team of the new chapter. If approved for transfer, all fees are transferable.

If a member perceives a conflict regarding the classification or category of a prospective member, the member must file a concern with the Chamber staff immediately. This should be done before a prospective member visitor is approved for membership in the chapter. Staff will assume the consent of all chapter members if no concerns are filed in a timely manner, i.e. before the member is officially accepted to the chapter.

- C. A representative of a Chamber member company may only join one group. However, a member company may have up to two (2) representatives sitting in different groups at one time.
- D. A member cannot belong to a second Chapter or any other group that allows only one person per profession and/or whose primary purpose is to pass referrals to one another, because doing so substantially reduces the member's commitment and availability to the BRG Chapter members.
- E. In rare instances, the Leadership Team may deny the membership of any potential member based on past performance in another Chamber Referral Group and/or a negative experience(s)

V. **Member Responsibilities**

- A. During each 6 month period, a member is only allowed three absences with a substitute but only one absence with no substitute for scheduled meetings. A Company representative may attend in the Member's absence, but the intent is for the Member to establish relationships in the group.
- B. During each month, bring referrals for other members. Guests who are potential members of the Chamber or the Referral Group count as a referral.
- C. During each month, complete Utime meetings with other members of the group. Meetings with members of other Referral groups are allowed.
- D. Respond to all "hot" referrals within 24-hours (see below for definition of hot referral).
- E. There are no leaves of absence other than for medical or military circumstances. Under those circumstances, a member may take up to eight weeks of leave with the Leadership Team's prior approval if the member's BRG dues are paid up to cover the absence and the member strives to send a long-term substitute during their leave. A member will be subject to removal from the Chapter if the absence exceeds eight weeks, is not previously approved, or if the member does not send at least one substitute during the period of leave.

VI. **Member Expectations**

- A. Be punctual, as respecting the group's time will establish credibility
- B. Bring at least one referral per quarter
- C. Be prepared to briefly introduce yourself (30-second commercial) and your business/organization and share what is a good referral for you.
- D. Be prepared to thank other members for referral resulting in closed business or potential business. Closed business will be reported to the group leaders.
- E. All Members are encouraged to give a 15-minute presentation (including Q&A) on your business/organization at least once a year. To be scheduled by group leadership.
- F. Do not wait until meetings to present referral, but always enter your referrals to Ulink to ensure proper credit and documentation.
- G. Bring an ample supply of business cards to each meeting
- H. Ulink is a referral management web-based app that allows member to communicate referrals, attendance, Utime meetings and contact information. Each member is expected to utilize the app in order to track the group's overall performance

VII. Attendance and Punctuality

The Leadership Team may issue warnings to members who are habitually tardy or leave early. If the problem continues, the member may be subject to removal by the Chamber staff.

A. Substitutes

1. Consider the following people as substitutes: customers, clients, patients, friends, family and employees.
2. If there is no classification or category conflict with another member of the Chapter, a substitute can mention their business but primarily promote the business of the person for whom they are substituting.
3. The vice chair or secretary should be advised in advance if a member is sending a substitute to a meeting. The Chapter Greeter should arrive early to greet substitutes and guests.
4. A member should have a substitute come when they are absent not replace them on a continuous basis. Substitutes may give a member presentation that focuses only on the Chapter member's business.

VIII. Officers

A. Terms

Officers shall be elected by the respective groups by the last meeting of the year based on the inception date of the group and begin serving for a one-year term the first of the month following the anniversary date of the group each year. During their respective terms, each Leader's referral group membership will be complementary. Leaders of all active groups shall meet as a group at least once per quarter. Substitutes for leaders do not assume Leadership position.

IX. Accountability

- A. If a member representative should leave his/her Chamber member business/organization, the business/organization has 15 days to propose a replacement representative or forfeit the exclusive category position in the group. The proposed person must be approved by group leadership.
- B. Attendance is critical to the group. If a member cannot attend, they may send a substitute (not a member of their own Chapter) to the meeting. This will not count as an absence. A member is allowed three absences with a substitute in any six month period. A member may be subject to removal from the Chapter if absences and substitutions become excessive.
- C. Members are required to bring bona-fide referrals and/or visitors to their Chapter of BRG. Members are expected to strive for regular referrals to their fellow Chapter members. Each Chapter may establish minimum referral requirements by which members maintain good standing in the Chapter.
- D. If a member does not meet performance expectations in ANY quarter, the member will be immediately subject to review by the Leadership Team. In addition:
 1. When a member has missed two (2) meetings, he/she will receive a notice from the Vice Chair.
 2. In the event that a member is not performing according to the expectations of the Leadership, in a quarter, he/she will be subject to review by the Leadership Team and may be dropped from the group.
- D. Dropped members may rejoin the group only after review by the Leadership Team.
- E. Chamber staff may, at its sole discretion, place a member on probation as to the member's participation in BRG. During this period, the member may not give an infomercial or presentation in any chapter of BRG.

X. **Guests**

- A. Prospective Chamber Members may attend one (1) meeting of a Referral group at no charge and a second time for a (1) time fee of \$20. The fee will be applied to the group membership cost should the visitor decide to join the Referral Group.
- B. Visitors may attend a given Chapter's meeting up to two times
- C. Chamber Membership, including full payment of Referral group dues, is required before attending a third meeting.

Visiting Groups

- D. Members visiting other Chapters should announce that they are from another Chapter at the beginning of the meeting.
- E. Visiting members must not do or say anything that competes with a member of the Chapter they are visiting.
- F. Before visiting another Chapter, the visiting member should call the Chair of that Chapter first.
- G. A visiting member should visit on the same basis as a regular visitor, i.e. no more than twice in a six-month period.

XI. **Communications/Contact Information**

- A. Group emails may only be sent for the purposes of the group. No solicitation emails to group members are permitted.
- B. To guard contact information for the benefit of the members, rosters will not be distributed at meetings, but will be emailed by the Secretary.

XII. **Administrative Policies**

- A. The annual BRG dues are \$175 and are due upon submission of an application for membership and then on the anniversary date of a member's acceptance annually.
- B. Renewal membership dues are payable 30 days prior to the member's membership anniversary date. Failure to pay in full before the anniversary date will result in a \$20 late charge. If fees are not paid within 15 days thereafter, the membership will be terminated.
- C. All dues and other fees are non-refundable.
- D. Dues and fees cannot be transferred from one person to another, unless the dues and fees were paid by one company employing both persons, which company is a Chamber of Commerce member.
- E. Returned checks will be subject to a minimum \$25 returned check fee. If a member passes a second returned check, that member will be subject to immediate termination.

XIII. **Definitions**

A. Utime meetings

A Utime is a meeting scheduled, separate of the Referral Group meeting, with another member to get to know that Member on a personal level, not sales purposes. These meetings can be 45 –60 minutes long to allow both members to talk.

B. Referral

A referral is an introduction of a group member's products and/or services to a prospective client by another group member. All referrals are tracked and reported to the group.

C. Referral Types

The best type of referral brings new business or new contacts to another member of the group. There are two (2) different types of referrals:

Warm Referrals Contact may not need your service but would like to hear from you

Hot Referrals Prospect has discussed doing business with you; contact immediately

While both are welcome, hot referrals are always the best!

XIV. **Multi-Level Marketing**

Multi-level marketing members of BRG should represent their products and services and not the business opportunity element of their business.

XV. **Business Referral Group Code of Conduct**

In order to provide all participants with the opportunity to benefit from activities, the Chamber is committed to providing a friendly, safe, supportive and harassment-free environment for all BRG participants, regardless of gender, age, sexual orientation, gender identity, gender expression, disability, physical appearance, body size, race, ethnicity, religion or other group identity.

This code of conduct outlines CHAMBER's expectations for all BRG attendees and participants, including all members, speakers, vendors, media representatives, commentators, exhibitors, sponsors and volunteers. Cooperation is expected from everyone and staff and leaders will actively enforce this code. Violations are taken seriously.

A. Expected Behavior

CHAMBER expects BRG participants to communicate professionally and constructively, whether in person or virtually, handling dissent or disagreement with courtesy, dignity and an open mind, being respectful when providing feedback, and being open to alternate points of view. Likewise, when sharing information about the organization or any participants via public communication channels, CHAMBER expects participants to share responsibly and clearly distinguish individual opinion from fact.

B. Unacceptable Behavior

CHAMBER does not tolerate harassment of BRG attendees or participants in any form. Harassment includes offensive verbal or written comments, and negative behavior, either in real or virtual space, including those which are related to or are based upon gender, age, sexual orientation, gender identity, gender expression, disability, physical appearance, body size, race, ethnicity, religion or other group identity. All defamatory, abusive, profane, threatening, offensive, or illegal discussion or materials are strictly prohibited. Harassment also includes deliberate intimidation, stalking, following, harassing photography or recording, sustained disruption of talks or other events, and unwelcome physical contact or sexual attention.

C. Consequences of Unacceptable Behavior

If an attendee or participant, in either real or virtual space, engages in inappropriate, harassing, abusive or destructive behavior or language, the BRG and CHAMBER staff will determine and carry out the appropriate course of action, including warning the offender, expulsion from the BRG with no refund and/or banning the offender from future CHAMBER events and activities. All participants are expected to observe these rules and behaviors in all Chamber venues, including online venues and Chamber social events. BRG participants seek to learn, network and enjoy themselves in the process, free from any type of harassment. Please participate responsibly and with respect for the rights of others.

D. What to do

If you are being harassed, notice that someone else is being harassed, or have any other concerns about an individual's conduct, please contact President/CEO, Angela Perry at angip@elkgrovec.com or (916) 691.3760. Your concerns will be held as confidential as you would like them to be and you may remain anonymous.

XVI. TERMS

- A. Arbitration:** All disputes arising out of or related to this Agreement or the member's participation in BRG shall be resolved by binding arbitration in accordance with the laws of California. The Arbitration shall be subject to the Rules of the American Arbitration Association. This clause encompasses any and all disputes involving BRG, The Elk Grove Chamber, and their officers, Leaders, agents and representatives.
- B. Limitations on Liability:** Notwithstanding any other provision of this Agreement, any liability to you involving BRG, The Chamber and their officers, Leaders, agents and representatives for any cause whatsoever arising out of or related to this Agreement and/or membership or participation in the Chamber or BRG, and regardless of the form of the action, will at all times be limited to the amount of yearly dues paid by you for the membership in BRG. Except in jurisdictions where such provisions are restricted, in no event will there be any liability to you or any third person for any indirect, consequential, exemplary, incidental, special or punitive damages.
- C. Disclaimer**
Any leads and/or referrals exchanged among the group in or out of meetings are not the views and/or opinions of the Elk Grove Chamber of Commerce. The Chamber cannot recommend any product or service, but can provide a list of current Chamber members that provide specific products and/or services. Members must commit to non-disclosure of information that might be construed as derogatory in any nature to other Chamber members. Information at meetings should be understood as neither coming from the Chamber nor substantiated by the Chamber

Acknowledgement/Agreement

Referral Groups are dependent upon full and active participation of their respective members. Further, membership precludes the involvement of other Chamber members within represented business/organization categories. Therefore, failure to abide by the aforementioned rules during each quarter of membership will subject the member to review and potentially lead to dismissal from the group.



By signing below, I am confirming that I have read the 6 page Referral Group Agreement (Rev. Sept. 6, 2016) and agree to abide by the Guidelines and Code of Conduct to the best of my ability.

Printed Name

Date

Business Name

Signature