



Referral Group Guidelines

- I. Mission

Help members' businesses grow and prosper through a mutual commitment to continually promote each other's businesses by recommending one another to prospective clients and customers.
- II. Objective

GBCOC Referral Group is a networking referral group. We will meet weekly with the purpose of exchanging qualified referrals among our members. We will be able to measure the percentage of our business that is attributable to the GBCOC Referral Group.
- III. Investment
 - A. Membership Fee of \$120 per year. The annual membership period runs from October through September. The membership fee for the first year will be prorated based on start date.
 - B. One time Application Fee of \$30 at time of application.
- IV. Membership
 - A. In order to participate in a GBCOC Referral Group, one must first be a member in good standing with the Greater Beaumont Chamber of Commerce. If not currently a member of the Greater Beaumont Chamber of Commerce, the company must join at the Beaumont level of \$325 yearly or higher level. Please refer to bmtcoc.org or call 409-838-6581 for further information about levels of investment for the Greater Beaumont Chamber of Commerce membership. Non-profits are able to join at a non-profit level of \$175 yearly.
 - B. To become a member of a GBCOC Referral Group, the prospective member must complete an application. The Leadership Committee will review the application, interview the applicant, and contact references, along with ensuring no conflict with an existing member. Once approved by the Leadership Committee, the Membership Liaison will email the application to the existing members for a vote. Majority is constituted by half plus one of the members.
 - C. GBCOC Referral Group membership is determined by who pays for the membership. If an individual of a member company pays for the membership, it belongs to the individual. If that individual changes companies, he/she can opt to remain in the GBCOC Referral Group in his/her assigned category, as long as the new company is a member of the Greater

Beaumont Chamber of Commerce. If he/she changes companies and fall into another category, he/she can remain in the group if the new category is vacant. If a member company pays for the GBCOC Referral Group membership, it belongs to the company. The company can assign a new representative if the seat is vacated by the current attendee.

- D. Only one representative from each business category is permitted.
- E. Members should only represent their primary business focus; therefore, allowing the group to grow by bringing in new members to represent more business categories. A focus on one's main business and area of expertise cuts out confusion over members who may represent various categories, and opens the door for more members to come into the group resulting in more potential contacts and more referrals being passed.
- F. When a question arises as to a possible conflict in categories, the current member in the category in question will be consulted for input to address any concern privately.
- G. Attendance Requirements
Attendance is extremely important to the GBCOC Referral Group and being a member is a privilege.
 - 1. A member must be in attendance for the entire meeting to receive attendance credit.
 - 2. A member is allowed 3 absences per quarter.
 - 3. If a member cannot attend a meeting, he/she can send a substitute in his/her place. The member will be responsible for providing his/her substitute with a script for the 60 second presentation, and any referrals, outside meeting group "OMG", or business dollars to turn in on the member's behalf. This will not count against the 3 absences allowed per quarter.
 - 4. A member cannot miss more than 2 consecutive regularly scheduled meetings.
 - 5. If there are more absences than allowed, the Leadership Committee will review the member's participation in the group before determining a course of action up to and including loss of GBCOC Referral Group membership.
 - 6. A member may request a leave of absence for 3-12 consecutive weeks which will be considered and decided upon by the Leadership Committee. This does not include "busy season".
- H. The average group size is expected to maintain at least 20 members. If the membership drops below 20 members, the group will have 90 days to grow back to the acceptable level.

- I. A seat becomes vacant when (1) someone resigns from the group, (2) when someone does not meet the guidelines on referrals, code of ethics, and/or attendance and is removed from the group, (3) if the member does not renew at the yearly renewal time or (4) if the member's company is no longer in good standing with the Greater Beaumont Chamber of Commerce. Any program fees will be forfeited regardless of the time of cancellation.
 - J. An individual may only be a member of one GBCOC Referral Group. Other individuals from the same employer may become members of any different GBCOC Referral Groups.
 - K. Visitors are encouraged to attend meetings. Members are encouraged to bring guests to meetings. Guests can be members of the Greater Beaumont Chamber of Commerce OR non-members. If a non-member is interested in joining the GBCOC Referral Group, he/she will first need to have his/her employer become a member of the Greater Beaumont Chamber of Commerce before submitting an application for the referral group.
- V. Leadership Committee
- A. President Responsibilities
 1. Presiding over regular meetings, including but not limited to introductions of members and guests, presentations, old and new business.
 2. Ensure meetings follow appropriate protocol.
 3. Conduct special meetings as needed.
 4. Appoint committees or work groups to address business needs.
 - B. Vice President Responsibilities
 1. Fulfill president's role in his/her absence.
 2. Provide administrative oversight of the grievance process.
 3. Maintain schedule of speakers.
 4. Process new member applications
 5. Will fulfill presidential role when current president's term has been completed.
 6. Keep membership roster
 - C. Secretary Responsibilities
 1. Record member referrals.
 2. Record member attendance.
 3. Record meeting activity.
 4. Report weekly, monthly, and yearly activity to the group.
 5. Create Leadership Committee election ballot.
 6. Will email monthly tracking numbers to the Greater Beaumont Chamber of Commerce staff liaison by the last Friday of each month to be included in the Membership Division Report.

D. Membership Liaison Responsibilities

1. Ensure Greater Beaumont Chamber of Commerce membership is maintained and in good standing.
2. Ensure GBCOC Referral Group membership is maintained and in good standing.
3. Assign new members to appropriate mentors.
4. Responsible for new member binders.
5. Act as a confidant for any member who may or may not have a conflict of interest with the group or any member of the group.
6. Act as chair for the GBCOC Referral Group Membership Committee.
 - a. The group will have a Membership Committee whose responsibility is to grow and maintain membership of the GBCOC Referral Group.
 - b. They will also elevate any conflict of interest concerns between members to the Membership Liaison.
7. Will provide updates for membership of the GBCOC Referral Group to the Greater Beaumont Chamber of Commerce.

E. Education Coordinator

1. Responsible for presenting a 3-5 minute Education Moment for each weekly meeting. The Education Moment should help teach our members how to better network, solicit qualified referrals, give more qualified referrals, how to be the best contributing member they can be for the GBCOC Referral Group, and any other topics deemed necessary by the Leadership Committee or any active members of the GBCOC Referral Group.
2. Will maintain communication between the Leadership Committee and the membership of the GBCOC Referral Group to help define topics to be discussed during the Education Moment. (I.e. if the members are not doing enough outside meeting group “OMG” and there is a noticeable drop in qualified referrals, the Education Coordinator will present an Education Moment highlighting the importance of conducting outside meeting group “OMG” with fellow members.)
3. Will head up any contests or games that will illustrate the values of the GBCOC Referral Group.

F. The Leadership Committee shall convene no less than quarterly.

G. The Leadership Committee as a whole is responsible for reviewing new member applications, reviewing current members’ participation and contribution to the group, conflict resolution, upholding the Code of Ethics, leading the group by example, and any and all other things to be determined necessary by the GBCOC Referral Group.

H. Leadership Committee Appointments and Election Terms

1. The initial Leadership Committee of a newly formed group will be appointed by the Greater Beaumont Chamber of Commerce Membership Division for the first year. Thereafter, the positions shall be elected by the members of the group, with the exception of the president's role which will be fulfilled by the vice president.
2. Members of the Leadership Committee are to be elected annually. There is a term limit of 2 years for each Leadership Committee position. The term year starts in October and ends in September. The vice president takes over the role of president once the term is completed.
3. Nominations can be made by any member of the GBCOC Referral Group in the month of August, which will be one month prior to the elections. The person nominated must approve of the nomination. A member may self-nominate.
 - a. To be nominated for vice president, the member must have been on the Leadership Committee for at least 9 months the previous year.
 - b. A nominee must have at least 3 months of membership with the GBCOC Referral Group prior to time of nomination. He/She must also be in good standing with the Greater Beaumont Chamber of Commerce.
4. The members of the Leadership Committee will be elected annually in September one month before the new term year starts in October.
5. The voting will be done by ballot and will be counted by the GBCOC Membership Division.

VI. Meetings

- A. Meetings shall be held weekly at The Greater Beaumont Chamber of Commerce Board Room at a time to be determined by the Chamber Staff Liaison and the GBCOC Referral Group's Leadership Committee.
- B. Each weekly meeting will be approximately 1 hour.
- C. Meetings are to include a brief 60 second commercial/introduction from each member. The member may only promote the product or services in the business category under which he/she is a member, as to not encroach upon another member's category.
- D. Meetings are to include a 10 minute presentation by a member of his/her business, or other business interests as determined by the group. The member may only present on the products or services in the category under which he/she is a member, as to not encroach upon another member's category. The presenting member must have at least 90 days of membership with the GBCOC Referral Group in good standing.
- E. After introductions and announcements, each member shall be provided an opportunity to announce referrals, outside meeting group "OMG", business

dollars, and visitors in attendance. In lieu of a referral, members can give a testimonial about a fellow member of the group, or positive feedback from a referral. This is called the “I have...” portion of the meeting, meaning members cannot stand up and say “I don’t have...” or pass the bucket. Every member is responsible for contributing to this portion of the meeting because of its importance.

VII. Guests and Prospective Members

- A. Guests will be given a brief period to introduce themselves and their business. If their business category is not yet represented in the group, they will be allowed the same 60 second presentation as the members to talk about what they do and possible contacts they are looking for.
- B. Guests may attend up to 3 meetings at no charge before requesting an application for membership with the GBCOC Referral Group.
- C. A new member’s application will operate on a first-come, first-paid selection process if two or more guests would like to occupy the same business category. The first paid application will be submitted for review under the guidelines stated in Section IV-B. If for whatever reason the application is denied, the next paid application will be submitted for review in sequential order until the chair of interest has been filled.
- D. To become a member, refer to Section IV-B.
- E. Guests and prospective guests may not accept requests to meet with other members for the purpose of referring business until GBCOC Referral Group membership has been secured.

VIII. Referrals

- A. A qualified referral is giving the name of a person, or business, and contact information to another member and the referred person, or business, is expecting the call. We also encourage personal introductions to establish a qualified referral. You do not have to wait until the meeting to give the referral. Referral slips will be completed at each meeting; however, they cannot be given to the recipient until the referred person, or business, has been contacted.
- B. There is no guarantee that the referral will meet with the member to whom he/she was referred or do any business.
- C. Each member is required to give a minimum of four referrals per quarter.
- D. Cross-referrals count as a referral. A cross-referral is giving a referral to a member in another associated GBCOC Referral Group. Documentation of cross-referrals must be given to the group Secretary to record the transaction. Cross-referrals may only be given from one group to another if there is no representative of the recipient’s business category in the prior group.

- E. Members who fail to provide sufficient referrals may have their membership reviewed by the Leadership Committee to determine a course of action up to and including loss of membership. Any and all recognizable efforts made by any members in question will be taken into consideration. Examples of such efforts are outside meeting group “OMG”, attendance, participation, etc.
- IX. Complaints and Disputes
- A. All complaints must be submitted in writing or by email to the Membership Liaison for review by the Leadership Committee.
 - B. Complaints will be addressed by the Leadership Committee and responded to in writing or by email in a timely manner by the Membership Liaison.
 - C. If the resolution is not satisfactory to the complaining member, or if the complaint involves a member of the Leadership Committee, then the issue may be escalated to a meeting between all parties and the Greater Beaumont Chamber of Commerce Staff Liaison or a member of the GBCOC Membership Division. The decision and resolution issued by this ad hoc committee are binding and final.
- X. Other
- A. The Greater Beaumont Chamber of Commerce will provide website updates to GBCOC Referral Group membership’s lists in a timely manner.
 - B. The Greater Beaumont Chamber of Commerce will provide referral slips, GBCOC Referral Group binder, and business card holder.
 - C. The Greater Beaumont Chamber of Commerce will keep the waiting list of members wanting to join a group.
 - D. The Membership Liaison will act as point of contact for the GBCOC Referral Group and provide the designated Chamber Staff Liaison with any needs of the group. Members of the Leadership Committee are responsible for getting action sheets to the Greater Beaumont Chamber of Commerce in a timely manner.