



## Referral Roundtables - Guidelines 2023 -

### **Mission**

*The mission of Referral Roundtables is to increase the business of Newport Beach Chamber of Commerce members by building relationships through the exchange of referrals.*

### **1. Organization**

- A. Referral Roundtables ("Roundtables") are included within the Membership Division of the Newport Beach Chamber of Commerce.
- B. Each Referral Roundtable group will be governed by a Leadership Team. The Leadership Team will consist of that group's: (1) Chairman; (2) Vice Chairman; (3) Membership Chairman; (4) the Chamber's Membership Services Director ("MSD"); (5) the Chambers Members Services Coordinator ("MSC") and (5) the Chamber's Board Council Chair.

### **2. Leadership Team Terms:**

- The Chamber's Member Services Director (MSD), the Member Services Coordinator (MSC) and the Chamber's Board Membership Council Chair will also serve as an integral part of the Referral Roundtables program. Altogether, each group's Chairman, Vice Chairman, and Membership Chairman alongside the Chamber's Membership Services Director ("MSD"), Member Services Coordinator ("MSC"), and the appointed/active Chamber's Board Council Chair will serve as the Referral Roundtables Leadership Team ("Leadership Team").
- *(for a NEW RR Group)* Leadership shall be chosen by the Chamber Member Services Director and Member Services Coordinator.
- Officers shall serve a one-year term from the month they began to January (January to January) of each year.
- At the end (1) One year; Leadership shall be elected by the Members of their respective Referral Roundtable Group ("Members") by the last meeting of the year.
- Should the Chairman need to step down or be relinquished of their duties prior to their term the Vice Chairman would succeed Chairman duties. Should the Vice Chairman and/or Membership Chairman need to be relinquished of their duties prior to their term, the respective Referral Roundtable Group "Members" would then nominate, a group volunteer and vote a member in to assume the perspective duties.

### **3. Referral Roundtables Leadership Team**

- There will be three officers for each Referral Roundtable group: (1) Chairman; (2) Vice Chairman; and (3) Membership Chairman.
- **Chairman- duties include:**
  - Prepare a written agenda in advance of each Referral Roundtable meeting and copy the Leadership Team.
  - Send an Outlook calendar invite to all Members and a separate Outlook calendar invite to all Guests at least two (2) days prior to each meeting.
  - Set up and maintain the Referral Roundtable Speakers Schedule.
  - Conduct each Referral Roundtable meeting remembering to start and end the meeting promptly.
  - Oversee/support the duties of Vice Chairman and Membership Chairman.

Updated as of 02-2023

Newport Beach Chamber of Commerce

4343 Von Karman Ave., Ste. 150-W, Newport Beach, CA 92660

Initial\_\_\_\_\_

- **Vice Chairman- duties include:**
  - Serve in the absence of the Chairman.
  - In cooperation with the Chamber's Membership Services Coordinator, track Referrals given, one-on-one's (1:1), and Secured Referral Amount ("SRA") for each Referral Roundtable meeting, quarter, and year. Communicate these stats to the Chamber's Member Services Director ("MSD") and the Membership Services Coordinator ("MSC").
  - At each meeting, be prepared to give a report of Referrals, one-on-one's (1:1), and Secured Referral Amount (SRA) statistics.
  - Regularly review one-on-one's (1:1), Referrals, and Secured Referral Amount (SRA) to ensure compliance with Referral Roundtables Member Responsibilities. Routinely consult with the Leadership Team to address Members who fail to meet membership requirements/expectations.
  - In cooperation with the Chairman and Membership Chair, ensure that a quarterly after-hours social for the group is planned. Additionally, coordinate a joint annual after-hours social with all other Referral Roundtable groups. Communicate all proposed dates for Referral Roundtables socials to the Chamber's Member Services Director.
- **Membership Chairman- duties include:**
  - In cooperation with the Chamber's Membership Services Coordinator ("MSC") maintain an up-to-date roster of all Referral Roundtable Members.
  - Track attendance at each meeting.
  - Send a copy of the updated attendance roster with Guest information via email to the Leadership Team after each Referral Roundtable meeting.
  - Regularly review meeting attendance to ensure compliance with Referral Roundtables Member Responsibilities. Routinely consult with the Leadership Team to address Members who fail to meet membership attendance requirements.
  - Greet and assist all Guests at meetings.
  - Email each Guest after their initial visit to a Referral Roundtable group, sending the form Guest/Applicant email. Follow up and send application materials if necessary.
  - Participate in the Referral Roundtable Member Selection Panel.
  - In advance, assign the role of Greeter if unable to attend a meeting.

### 3. **Member Qualifications**

- Referral Roundtable groups are limited to one Member per business category (corresponding with Referral Roundtables Membership Categories) per group. Members must choose one (1) "Primary Category," defined as 70% or higher of the Member's revenue/income. The "Leadership Team" may occasionally authorize a member to temporarily occupy a second Primary Category provided there is NOT a member currently occupying that Category, and until the Category is filled by a separate Member. To represent a specific Primary Category in a Roundtable group, the Member must be listed under that Category with the Chamber.
- Only one representative per business may participate in a specific Referral Roundtable group.
- A Member may only be involved in one Referral Roundtable group (inside or outside the NBCC).

- The Chamber reserves the right to deny or revoke the participation of “ANY” member, including RR Leadership based on that member(s) past/present performance within a RR Group, with its members and/or negative experience(s); i.e., non-compliance of the RR Guidelines or misrepresentation of the Chamber of Newport Beach, or misconduct of any kind while participating in a Referral Roundtable Group whether verbal, physical or in writing.

#### 4. **Member Selection (NOTE: the entire selection process should NOT take more than 4 weeks max)**

- The following steps will be taken upon an Applicant expressing interest in joining the Referral Roundtables:
  - Application and Guidelines are communicated and provided to “The Applicant” by Referral Roundtable Members, RR Leaders, Other Chamber Members, Ambassadors, and Chamber Staff.
  - The completed Application and Guidelines MUST be filled out, signed, and returned by the Applicant to the Chamber the Staff (MSC and MSD) for immediate evaluation and processing to appropriate RR group placement.
  - Chamber Staff will confirm with the Applicant whether an open spot in the Applicant’s Primary Category is available.
  - If a Primary Category spot is available, the “RR Group Leadership” begins the review/Interview process of the Applicant as follows:
    1. MSC will email and introduce the “Membership Chair” and “Applicant” (CC’ing the RR Chair and Vice Chair).
    2. The “Membership Chair” will then email the Applicant their acknowledgement of the application and invites them to “sit in” on the NEXT (1-2) available meetings. **(This should happen within 24 hours of application receipt)**
    3. The “Membership Chair and Chair will then meet with the Applicant after the group meeting “sit in” to discuss and coordinate the actual interview **(immediately after First Meeting Sit in)**
    4. The Interview will be conducted by the “Membership Chair” with another RR Leader if available. **(the should be scheduled and completed within 1 week of sit in date)**
    5. The Interview is completed by utilizing the **“Selection Matrix Sheet.”**
    6. The Membership Chair reviews the completed “Selection Matrix Sheet” with the Membership Chair and Vice Chair to complete Acceptance and/or Denial.
    7. The Membership Chair then Emails the Applicant the Acceptance and/or Denial of group, CC to Chamber Staff (“MSD” and “MSC”) for applicable processing. **(Completed on/or before week 4 from the date of Applicant Introduction & meeting sit in).**
- During the review process, Applicant must attend at least two (1) group meeting. The Referral Roundtable Chair will include the Applicant as a guest on their meeting invite.
- Member Selection Panel advises Applicant of selection if applicable. If an Applicant is approved for Referral Roundtables and joins the Chamber, he/she will become an active Referral Roundtables Member and may attend meetings, receive group emails.
- An Applicant must be a Chamber Member and/or Member in good standing to be selected to Referral Roundtables. Chamber Membership must be maintained to continue as a RR participant/member. If Applicant fails to become a member of the Newport Beach Chamber of Commerce within five (5) business days applying for Referral Roundtables membership, Applicant forfeits his/her application, and the Primary Category will be made available to other Applicants.
- Selection Criteria. Selection in Referral Roundtables is highly competitive. Member selection will be based on the following criteria:
  1. Application;
  2. Interview with the Membership Chair and other Leader Member if available
  3. Membership and Participation in Chamber (current members only); and
  4. Limited participation and leadership in similar outside organizations, i.e., other Chamber Leads groups.
- All Applicants will be evaluated according to the above Selection Criteria. This includes the following categories of prospective members: (1) One Applicant for Primary Category; or (2) Two or more Applicants for Primary Category.

- If two or more Applicants both apply for the same Primary Category, the Applicant with the highest score will be selected. In the event of a tie, the Chamber's Member Services Director, Chairman and Vice Chairman will meet to review and decide.
- Every effort will be made to accommodate and place all Applicants into the Referral Roundtables program. However, Applicants must understand that there are a limited number of available Member spots in this program.

#### 5. Member Responsibilities

- During each quarter, Roundtable Members must attend five (5) out of six (6) Referral Roundtable meetings. Should 2 or more absences occur the Chamber has the right to eliminate the member participant. Should a member be eliminated for non-compliance there is a 1 year waiting period until they can reapply.
- A representative of the Member's business may attend a total of two (2) meetings per quarter in the Member's absence, but the intent is for the Member to establish his/her own relationships in the group.
- During each month, Roundtable Members should refer at least one (1) Referral to other Roundtable Members or to the Chamber. Members may bring a prospective Chamber and/or Referral Roundtables Member to a Referral Roundtable meeting, which will count as one (1) Referral.
- Referrals to Members of other Referral Roundtables groups count towards a Member's Referral requirements, but Members may not divert Referrals which could be given to their own group Members to Members of competing groups, i.e., providing a Referral to a CPA in a competing group instead of providing a Referral to the CPA within your own group. Referrals to prospective members who have applied and are accepted into the Referral Roundtables program count towards a Member's Referral requirements.
- During each month, Roundtable Members must complete at least two (2) one-to-one meetings with other Members of their Referral Roundtable. One-to-one meetings which include more than one Member count as one (1) one-to-one for each participating Member. Meeting with a Guest of your Referral Roundtable counts as a one-to-one.
- Roundtable Members should respond to all Referrals within twenty-four (24) hours.
- A Roundtable Member's request for a "leave of absence" MUST be reviewed by the Leadership Team on a case-by-case basis. If granted, a leave of absence will serve to hold the Member's seat in their respective Primary Category for a certain length of time (not to exceed 2 months).

#### 6. Member Expectations- Referral Roundtable Members are expected to:

- Be punctual, as respecting the group's time will establish credibility.
- Be prepared to briefly introduce yourself and your business and share what is a good Referral for you.
- Be prepared to thank other Members for Referrals resulting in potential or "Secured Revenue Amount" (SRA). SRA's must be reported to the Leadership Team.
- All Members are encouraged to give a 5 to 10 minute presentation (including Q&A) on his/her business at least once per year. Members must understand that by accepting a presentation slot, they are taking that opportunity away from other Members. Accordingly, once assigned a presentation date, Members must come prepared to speak.
- Do not wait until Referral Roundtable meetings to present Referrals, but always complete a Referral Form to ensure proper credit and documentation.
- Bring an ample supply of business cards to each Referral Roundtable meeting.
- Respond to email communications from Leadership/Chamber Staff in a professional and timely manner.
- Professional demeanor and conduct are always a must while engaging in and/or with your respected RR group members, leadership, chamber staff and associates.

- Professional mis-conduct will NOT be tolerated and will be cause for dismissal of participation within the assigned RR group, and in some cases revocation of the members Chamber Membership status.
- Any mis-conduct type issues will be immediately brought to the attention of the Newport Beach Chamber Member Services Director.

## 7. **Accountability**

- If a new Roundtable Member does not meet the minimum requirements in their **first full quarter of membership**, he/she may be automatically dropped from the Referral Roundtable at the discretion of the Leadership and/or Chamber Member Services Director.
- If a veteran Member does not meet the minimum requirements in any quarter, the Member will be immediately subject to review by the Leadership Team, to be discussed with the Chamber Member Services Director.
- The Leadership Team will routinely monitor each Member's adherence to these Guidelines and communicate a member's failure to meet the minimum requirement with that Member. This communication will be both verbally and in writing copying the Chamber Member Services Director

## 8. **Meetings/Events**

- All Bi-Weekly Referral Roundtable meetings will be held in the Newport Beach Chamber Offices located at; 4343 Von Karman, Ste 150-W, Newport Beach, CA 92660.
- The Newport Beach Chamber of Commerce Referral Roundtables are a benefit provided to our "Active" Chamber Members and Members in "Good Standing." The Newport Chamber operates, manages, and markets the Referral Roundtable Meetings/Events, and manages the "Business Category" availability as well as the day, time, space of the said RR Meetings/Events. If a Referral Roundtable meeting is scheduled during a specific day/time and there needs to be a change due to a holiday, space (or lack thereof), mealtime or other, the Roundtable Leadership must communicate directly to the Member Services Director ("MSD") and Members Service Coordinator ("MSC").
- *Once a quarter*, all Referral Roundtable groups are encouraged to host an after-hours social and/or interactive team building activity at a Chamber member business, to be paid for by Roundtable Members. This encourages comradery and growth amongst the group's members.
- *Once a year*, all Referral Roundtables groups are encouraged to host a joint after-hours, or holiday social at a Chamber member business, to be paid for by Roundtable Members.

## 9. **Guests**

- Prospective member applicants of the Chamber may attend two (2) meetings of a Referral Roundtable group upon invitation during the application process. If a respective member wishes to invite a Guest to a meeting, they must first speak to the Chairman to obtain approval.
- Guests of the Chamber of Commerce, i.e., Speakers, Board Members, Staff, other RR Leadership may attend a Referral Roundtable Group via invitation, permission acknowledged by the RR Leadership and Member Services Director. All guests sitting in a RR group meeting may introduce themselves to the RR Group they are attending, stating that they are a "Guest Observer" only, unless they are a speaker.

## 10. **Group Communications**

- Group emails should be sent from the Leadership of a RR Group to its members copying the Chamber Staff (MSD and MSC).

## 11. **Definitions**

- **One-on-One's/ 1:1**  
A one-to-one/1:1 is a meeting scheduled, separate from the Referral Roundtable group meeting, with another Roundtable Member to get to know that Member on a personal level. These meetings should typically last 30-60 minutes in length to allow both Members to become more familiar with one another.
- **Referrals**

A Referrals is an introduction of a Roundtable Member and/or their products and/or services to a prospective client and/or professional contact by another Roundtable Member. All Referrals must be tracked and reported to the Referral Roundtables.

A Referral should introduce a new business opportunity or professional contact to another Member of the Referral Roundtables. Before making a direct email introduction between a member and a potential Referral, confirm with the Member that he/she is interested in the potential Referral.

The following are examples of appropriate Referrals:

- *"I would like to introduce you to the owner of Joe's Sports Shop. Joe needs marketing services, and I told him about your marketing business. Joe agreed that the two of you should talk."*
- *"I would like to introduce you to Jane, Esq. You mentioned that you are interested in an introduction to an immigration attorney to develop a strategic partnership. I told Jane, Esq. about you and she is interested in meeting you."*

The following is an example of an inappropriate Referral (this Referral can be given, but will not count towards a member's monthly Referral requirement:

- *"I saw that ABC Grocery is opening a new location in Newport. You should try to meet the owner and see if he/she could use your services."*

- **Secured Referral Amount (SRA)**

Secured Referral Amount (SRA) is defined as the GROSS total amount of an individual referral NOT the net value. For example, if a financial advisor secures a \$25,000 account, the referral is considered a \$25,000 referral.

**12. Disclaimer**

Any Referrals exchanged among the Referral Roundtables in or out of Referral Roundtables meetings are not the views and/or opinions of the Newport Beach Chamber of Commerce. The Newport Beach Chamber of Commerce cannot recommend any product and/or service but can provide a list of current Chamber members that provide specific products and/or services.

**13. Acknowledgement/Agreement**

Referral Roundtables are dependent upon full and active participation of their respective Members. Because Referral Roundtables membership is limited to NBCC Active Chamber Members, and only one Member per Primary Category, Referral Roundtables membership is highly competitive. Accordingly, failure to abide by these Guidelines will subject the Member to review by the Leadership Team and could potentially be cause for dismissal from the Referral Roundtables.

By signing below, I confirm that I have read and understand the Referral Roundtables Guidelines herein and agree to abide by these Guidelines to the best of my ability.

\_\_\_\_\_  
**Chamber Member Business/Organization**

\_\_\_\_\_  
**Printed Name/Title**

**X** \_\_\_\_\_  
*Signature* *Date*

***Referral Roundtables are a Membership Benefit of the Newport Beach Chamber of Commerce.***

**For questions, please contact  
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