

Newport Beach Chamber of Commerce Referral Roundtable Guidelines (2026-2027)

Mission

Referral Roundtables exist to increase business for **Newport Beach Chamber of Commerce (NBCC)** members by bringing professionals together to build relationships and exchange qualified referrals.

Organization

Program ownership: Referral Roundtables (“Roundtables”) operate within the Membership Division as a member benefit of the Newport Beach Chamber of Commerce overseen by the VP of Membership Services (Annette Malinowski)

Membership Eligibility and Commitment

Referral Roundtable participation is intended for members who are committed to building long-term business relationships and contributing to the success of the group, member-member.

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/or until the Category is filled by a separate Member.
 - To represent a specific Primary Category in a Roundtable group, the Member’s Category must match that under their Chamber Membership.
 - Must be a Newport Beach Chamber Member (a potential group member can fill out an application and visit a group, but cannot be seated until they are a Member) *see number 3 below in “Rules of Engagement”
 - Review, Complete and sign the Referral Roundtable Guidelines & Commitment Form
 - Maintain active Chamber membership
 - Remain engaged and supportive of group initiatives

External Leads Group Participation Restriction

To protect the continuity, commitment, and referral value within the Newport Chamber Referral Roundtable Program, applicants and members may not actively participate in other leads or referral-based networking groups outside of the Newport Beach Chamber of Commerce.

This policy ensures:

- Stronger internal referral relationships
- Consistent participation and engagement
- Protection of category exclusivity
- Greater value for all Chamber/Group members

***Exceptions, if any, must be reviewed and approved by the VP of Membership Services.

Potential Group Member- Visitation Rules of Engagement for Referral Roundtables**Leadership Oversight**

The Chamber VP of Membership Services along with the Chair reserves the right to:

- Approve or decline visitors
- Protect category exclusivity
- Ensure group alignment and engagement
- Address participation standards if needed

Category Exclusivity

- Each group maintains one member per business category to avoid internal competition.
- If the category is open, qualified visitors in that category are welcome to attend as guests.
- Once a category is filled, additional visitors in that same category are generally not permitted unless approved for evaluation or expansion purposes.

Visitor Eligibility

- Their business category is not currently represented in the group.
- They are the primary decision-maker, owner, or senior representative of their business.
- They are willing to participate professionally and contribute to the group's purpose of mutual referral and relationship-building.

Visitors should be:

- Invited by a current member or approved by the Chair or Chamber VP of Membership Services.
- In alignment with the group's professional standards and culture.

Number of Visits Allowed

Visiting potential members may attend (2-3) RR Groups with open business categories; one time each before being accepted to join.

- After visits, they must be:
 - Placed/Accepted in a group
 - Discontinue attending that specific group

***This protects the value of membership and prevents ongoing “free access.”*

Professional Conduct During Group Visit

Visitors should:

- Arrive on time and stay for the full meeting
- Provide a brief business introduction- “if invited to”
- Participate respectfully
- Not aggressively sell or pressure members
- Demonstrate interest in contributing referrals and building relationships

***The focus is on relationship-building, not direct selling.*

Visitation Does Not Guarantee Membership

- Visiting does not automatically reserve or guarantee the category.
- Membership is typically granted based on:
 - Category availability
 - Professional fit
 - Attendance commitment
 - Group Leadership approval (if applicable)
 - Chamber membership requirement

Transition from Visitor to Member

To officially be seated within a group, visitors typically must:

- Be a current Chamber member
- Submit a membership application and signed commitment form
- Agree to attendance and participation expectations (review and sign the guidelines herein)
- Receive approval from the Group Membership Chair and/or Chair, Vice Chair & VP of Membership Services

Membership Priority and Category Protection

If multiple prospects are interested in the same open category- Priority is typically given to:

- First fully qualified applicant
- Chamber Member vs a NON-Member
- Best professional fit
- Most committed participant

- Chair/Chamber leadership approval

Guest Speaker Visitors

- Members and Leadership may invite a guest speaker (does not need to be a chamber member).
- NBCC visiting guests (e.g., speakers, Board, staff, RR Leadership) may attend by invitation/permission from the RR Group Chair/Leadership and the VP of Membership Services.
- Any Group Members wanting to invite a guest speaker of any type must inform and seek approval from the **Chair or Vice Chair** for visitor head count and agenda placement. *** (No More than 3 visitors in total between potential Members and guest speakers per meeting- due to space and sound constraints in the chamber offices)*
 - Additionally, guests are primarily “observers” up until they speak and should leave thereafter.

RR Group Member Activity, Responsibilities & Professional Expectations

- Being punctual to meetings/1:1's- be prepared to introduce your business and ideal referrals
 - Please inform leadership of absences in advance of meetings
- Maintaining a Consistent attendance (often 75–80% minimum)
 - Per quarter: you must attend 4 out of 6 meetings.
 - Notify Leadership of absences within 24 hours min
- Leaves of absence:
 - Considered case-by-case by Leadership; if granted, holds the seat up to 2 months.
- Substitution:
 - Can substitute for the primary member (per rules noted below).
 - Sending a substitute if unable to attend for more than 1 meeting
 - Sub Must not conflict with the group's category exclusivity category (*primary member's category still governs*).
- Support Fellow Group Members
- Actively give and receive referrals (that is what the group is here for)
- Acknowledge referrals that lead to a Secured Referral Amount (SRA); report SRA to Leadership.
- Participate in Presenting a 5 to 10-minute presentation/spotlight (incl. Q&A) once per year when scheduled.
- Bring business cards to each meeting and 1:1
- Respond to RR Leadership/NBCC communications promptly
- Maintain a professional demeanor & ethical conduct with members, leadership, NBCC staff, and guests.
 - Misconduct is not tolerated and may result in removal from the group and, in severe cases, action on NBCC membership status.
 - Any conduct concerns are elevated to the VP of Membership Services immediately.

Referrals & 1:1's

- Minimum 1 - referral per month to members or to NBCC
 - **Responsiveness:** Respond to referrals within 24 hours.
- Submit referral forms- turn in promptly for logging
- Minimum of 2- 1:1 Meetings: one-to-ones/per month with members
- Referrals to members of other groups count- although we do not want members to divert a referral from your group's member in the same category.
- Bringing in a new Chamber member counts as a Referral

Accountability

- **New members:** Failure to meet minimum requirements in the first full quarter may result in automatic removal at the discretion of Leadership and/or the VP of Membership Services.
- **Veteran members:** Failure to meet requirements triggers immediate review by Leadership with the VP of Membership Services.

- Leadership monitors adherence and communicates shortfalls to members verbally and in writing (cc: VP of Membership Services).
- The Newport Chamber of Commerce 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.

****Sub-group member (Referral Roundtable):**

A company representative may substitute for a primary group member from the same company/business category either temporarily or long term. “A sub-group member is an additional representative of a current member company who participates under the company’s existing category seat. Sub-group members may network, exchange referrals, and substitute for the primary, but do not hold a separate seat. All conduct, attendance, and exclusivity rules apply.

- A secondary participant who attends and engages in a leads/referral group under the umbrella of an existing member company or primary seat—not holding a full, independent category seat.
- **Eligibility:** must be an active representative of the primary seats Chamber Membership account
- **Seat ownership:** Tied to the company’s primary seat; does **not** open a new industry/category seat.
- **Attendance/voice:** May attend, network, and share/receive referrals; often **non-voting** on leadership matters.

Newport Chamber Referral Roundtable Leadership Structure

Each Roundtable is governed by a **Leadership Team** the **Leadership team is managed by the Vice President of Membership Services of the Newport Chamber:**

1. **Chair**
2. **Vice Chair**
3. **Membership Chair**
4. *Vice President of Membership Services*
5. *NBCC Board Liaison*

Terms of Leadership

- **Leadership Terms:** Chair serves a (2) two-year term; Officers (Vice Chair/Membership Chair) serve a one-year term (January–January).
- **Elections:** By the last meeting of the year (November), the group elects the Chair (if termed), Vice Chair, and Membership Chair for the following term.
- **Vacancies:**
 - If the Chair steps down or is removed during their term, the Vice Chair assumes the Chair role.
 - If the Vice Chair or Membership Chair steps down or is removed, the Members nominate and elect a replacement.

Leadership Roles & Responsibilities

Chair

- Group emails & communications are to be sent by the “Chair” to the members, cc’ing the VP of Membership Services and other leadership
- Prepare and distribute a written agenda before each meeting (copies all Leadership Team including VP of Membership Services).
- Send calendar invitations to members and a separate invite to guest speakers at least 2 business days prior.
- Maintain the Guest Speaker Schedule (when applicable).
- Start and end meetings on time; facilitate the agenda.
- Provide oversight/support to Vice Chair and Membership Chair
- Work and communicate directly with VP of Membership Services
- Commit to uphold the Newport Chamber RR Guidelines herein

Vice Chair

- Serve in the Chair’s absence.
- With the VP of Membership Services, track:
 - Referrals, 1:1 meetings, and Secured Referral Amount (SRA) by meeting/monthly, quarter, and year.
 - Report these stats at meetings and upon request to the VP of Membership Services (bi-weekly reminders sent by NBCC).
- Monitor compliance with Member Responsibilities and consult Leadership on remediation.
- With Chair and Membership Chair, plan quarterly after-hours social activities; coordinate one joint annual social across all Roundtables; share proposed dates and venues with the VP of Membership Services.
- Commit to uphold the Newport Chamber RR Guidelines herein

Membership Chair

- Track attendance at each meeting.
- Maintain an up-to-date roster and send updated roster bi-weekly to VP of Membership Services. (A calendar reminder will be sent by the VP to ensure continuity).
- Monitor attendance compliance; consult Leadership on remediation.
- Greet and assist Visitors/Guest speakers that were scheduled. Have a back up to greet visitors if you are absent.
- Email reply to each potential group member upon receipt of the VISIT email sent by the VP of Membership Services, and after their first visit with the standard Guest/Applicant email
- Lead the Member Interview
- Coordinate the interview review and selection with leadership (Chair & Vice Chair)
- Commitment to uphold the Newport Chamber RR Guidelines herein

Potential RR Group Member Selection Process *(total process duration: ≤ 4 weeks)*

1) Interest & Application

- Roundtable information and Guidelines can be found online:
www.newportbeach.com/about/referrallroundtables
- Applicant is invited by another group member or chamber connections and completes the online application; the VP of Membership Services receives and routes it to the appropriate group “Membership chair” for the visitation and interview process start.

2) Category Availability

- The Chamber VP will confirm whether the Applicant’s Primary Category seat is open
- And will confirm space/capacity availability

3) Potential Group Member Visit(s) & Interview

- Once the visitation email is received - the **Membership Chair** invites the Applicant to sit in on the next available meetings *(contact within 24 hours of application receipt). No more than 3 total visitors/speakers combined: due to space/noise.*
- After the first sit-in, the Membership Chair *(and another Leaders, if available)* conduct an interview (ideally within 1 week of visit).
- The interview uses the Selection Matrix *(provided separately to Membership Chair).*

4) Panel Review & Decision

- The **Membership chair** with other leadership, reviews the Selection Matrix and determines acceptance or denial.
- The **Membership Chair** emails the decision to the Applicant (cc: all other Leadership & VP of Membership Services) *no later than week 4 from introduction email/first group visitation.*

Meetings & Events

- **Location:** Bi-weekly meetings are held at NBCC Offices: 4343 Von Karman Ave., Suite 150-W, Newport Beach, CA 92660.
- **Program management:** Roundtables are an NBCC-managed benefit for members in good standing. NBCC manages category availability, meeting day/time/space, and marketing.
- **Scheduling changes:** If a meeting must move due to holiday, space, or other constraints, Leadership must contact the VP of Membership Services.
- **Socials:**
 - Each group is encouraged to host a quarterly after-hours or team-building activity at a Chamber-member venue (self-paid by members).
 - All groups are encouraged to host one joint after-hours/holiday social annually (self-paid by members).

RR Definitions/Miscellaneous

One-to-One (1:1): A 30–60 minute meeting outside the Roundtable to deepen relationships and understanding of each other’s businesses.

Referral: An introduction by a Roundtable member that connects another member to a prospective client or professional contact resulting in a new opportunity. Confirm interest before making a direct email introduction.

Secured Referral Amount (SRA): The gross value of a referral that closes (e.g., a \$25,000 account = \$25,000 SRA).

Examples (Referrals):

- *Appropriate:* “I’d like to introduce you to Joe, owner of Joe’s Sports Shop—he needs marketing services and is expecting your call.”
- *Appropriate:* “You wanted an immigration attorney partner. I told Jane, Esq. about you; she’s interested in meeting.”
- *Not counted toward monthly requirement:* “I saw ABC Grocery is opening—maybe call them.”

New RR Groups:

- For NEW Roundtable Groups the VP of Membership Services will appoint the initial leadership. Groups must start with a minimum of seven (7) members-category specific.

Disclaimer

Referrals exchanged in or out of Roundtable meetings reflect the views and actions of individual members, not NBCC. NBCC does not recommend specific products/services but can provide a list of current members by category.

Acceptance of Understanding

Roundtables depend on full, active participation (you get what you give). Because seats are limited to one Primary Category and active NBCC members, placement is competitive. Failure to follow these Guidelines may lead to review by Leadership and potential dismissal from the group.

Referral Roundtables are a Member Benefit of the Newport Beach Chamber of Commerce

Questions? Contact: Annette Malinowski

Vice President- Membership Services & Business Development

O: (949) 729-4410 | M: (949) 933-6574 | annette@newportbeach.com

Signature of Acceptance Page

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

Newport Chamber Member:

Print- Company Name (Same as Chamber Membership Account)

Print- Name & Title

X

Signature

Date

Newport Chamber VP Membership Services: Annette M. Malinowski

X

Signature

Date