



Business Referral Group

Operating Guidelines

Revised for 2023

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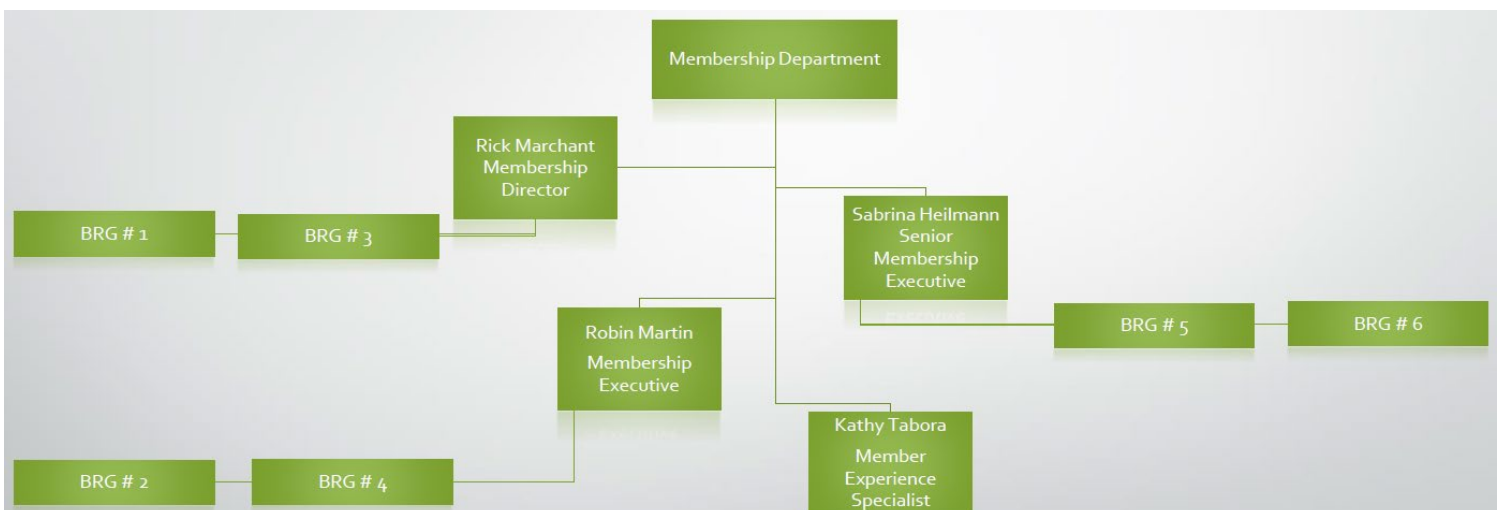
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What is a Business Referral Group?

The Business Referral Groups (BRG) is a powerful networking tool that provides a forum in which members promote business amongst each other, exchange business leads and referrals in a non-competitive setting.

When joining a BRG, members must commit to growing, contributing, and benefiting from the success of the group. Members should produce referrals (directed, non-specific, or personal) and qualified leads for other group members that may lead to new clients or professional relationships. Those who participate at this level enjoy participating and growing their network.

BRG Organizational Structure



Who can be a member?

Membership in BRGs is open to all Capital Region Chamber members at Premium or higher level of membership in good standing. Applications will be accepted on a first come, first served basis by date of application. Every effort will be made to accommodate applicants while maintaining one member per classification in each group. Applicants whose business type is already represented in all current groups will be placed on a waiting list until an opening becomes available.

Only one representative from a member organization can participate in one BRG group concurrently.

Member Application Process

The BRG Membership application process will be managed by Chamber staff, unless the group's Chair and the Chamber Liaison agree otherwise.

Process steps

- Applicant completes online [Business Referral Group Application](#) found on Chamber's website
- Chamber Liaison reviews and distributes application to the BRG via email
- BRG Members have seven (7) calendar days to notify the Chamber Liaison of any perceived conflict of interest.
- If no actual conflict of interest exists, the applicant will be contacted and added to the BRG roster.
- If a perceived conflict of interest is reported, then the Member may attempt to resolve it with conditions such as "the prospective member may not discuss those defined topics, while attending BRG events or meetings."
- If conflict of interest is too great, the applicant will be contacted by the Chamber Liaison and either placed on the wait list or have the application reviewed by another BRG.

No member of a BRG is to contact the applicant without first notifying the Chamber Liaison (unless the group Chair and the Chamber Liaison agree otherwise)

Attendance Policy

BRG Members are required to attend and participate in regular meetings. Attendance is defined as being present in AT LEAST either the first half or the second half hour of the regular meeting. If a member misses more than 30 minutes, it will be marked as an unexcused absence.

Members can incur up to three (3) absences during a six (6) month period, which are January through June and July through December. Absences will be documented on that group's roster and shared prior to each meeting.

Besides recording absences on the group's roster, members will receive the following communications relating to absences:

- After 2 absences – members will receive a reminder to ensure the member is aware that they are getting close to their absentee limit comes from the Chair, Vice-Chair, Secretary, or Chamber Liaison.
- After 3 absences – members will receive an attendance warning letter via email from the Chamber Liaison.
- After four absences, membership in the BRG will be terminated. The Member will be notified of the termination via email from the Chamber Liaison.

Excused Absences

The following are deemed to be excused absences for BRG members:

- Substantial health issues – does not include colds, flu, or other illnesses considered a typical “sick day” for work.
- Suffered a loss or are dealing with *significant or life-threatening* family or personal illness, includes Family Leave from your business
- Jury duty
- Attending another Capital Region Chamber event
- Religious observances or holidays

Excused absence should be submitted to the Chamber Liaison and the Group Chairperson/Vice Chairperson prior to the meeting(s) that the member will be absent.

Substitute Policy

When possible, members are encouraged to send a substitute if they are unable to attend a meeting.

The most likely substitutes are from the BRG member's company. When a substitute is attending a BRG meeting they represent the organization and individual listed on the BRG roster.

When it is not possible to send a substitute from the same company, then a substitute from another company or industry may be sent. This substitute can participate in delivering an elevator speech but must remain respectful of any competing businesses who are members. In this case, a non-member substitute may be asked to limit what information is shared ~~to~~. The sole intention of a substitute is to act as a participating member in the absence of the main representative on their behalf.

†All Call-to-action, announcements and activities must reflect the rostered member's organization and industry.

Meeting Information

All BRGs meet twice a month. In-person BRGs will meet at their designated Chamber's offices, while the Virtual BRGs will receive a meeting link from the Chamber Liaison prior to each meeting.

In the event an in-person BRG is not able to meet at its normal location due to scheduling conflicts, or extenuating circumstance†, the Chamber Liaison will notify the group via email.

Occasionally the BRGs may host an offsite combined BRG, or an "open networking" event, this provides an opportunity for all BRGs to network. No attendance will be recorded for these events.

†May switch to virtual meeting when deemed necessary by Chamber.

Group Format

The format of each BRG is decided and determined by the group's Chair, Vice-Chair, Program Chair and members, and can be modified throughout the year. The group's administration and members can create the meeting format tailored to the specific needs of their group. The Maximum number of members in a BRG is not to exceed 30 for any group. However, groups may elect to cap their membership at a smaller number based on physical space or logistics.

BRG Guests

Inviting both perspective Chamber members and existing Chamber members is a great way to recruit new members to your BRG. Guests may be invited to attend a BRG meeting by either a member of the group or Chamber staff. This provides an opportunity to demonstrate how BRG's work and make an informed decision prior to applying to a BRG.

Guests may opt to attend several groups prior to deciding which group to join. Guests will be limited to attending **one** (1) BRG meeting per group before they are required to apply to that BRG for membership. Guests are allowed to attend and participate in all group activities for that day's meeting. If a guest is not a member of the Chamber, he/she/they must contact the Chamber Liaison by the end of the meeting.

Members are asked to notify their Chamber Liaison, Chair, and Vice-Chair preferably one week prior to the meeting you are inviting the guest.

BRG Leadership Election Process

BRG leadership terms are the calendar year January 1 through December 31. Nominations will begin in Fall and voting completed prior to December. In the case of an out of cycle leadership vacancy, the new officer's term can be extended to maintain consistency within the group.

Procedure for Elections

Chamber Liaison will conduct elections.

1. Chamber Liaison will email a request for nominations and a copy of position responsibilities to the BRGs in the Fall.
2. BRG members will email nominations to the Chamber Liaison by date specified in email from Chamber Liaison.
3. The Chamber Liaison will contact and confirm nomination of BRG member if nominated by someone other than them self.
4. Chamber Liaison will email ballots to BRG members with a deadline for casting votes via email.
5. Election results will be announced via email.

Roles and Responsibilities

Position Title: BRG Member

Staff Partner: Membership Executive

Appointment Method: Application process

Term: None. Must be a Chamber member in good standing

Commitment: Attend two (2) BRG meetings per month

- The member's seat is held by the organization (Chamber Investor) and not the person who occupies the seat
- Adhere to all BRG Guidelines, including the attendance policy
- Be willing to share industry, economic or regional data that may benefit the members for informational purposes
- Be proactive and genuinely interested in building relationships with other members
- Maintaining contact with other members in between meetings. Conduct ongoing "one on one meetings" and joint venture activities to help develop trust and knowledge between members
- Positively represent the business that holds the seat for the BRG
- Represent only one Chamber member business within the BRG*
- Participate in all regular scheduled group meetings
- Notify Chairperson and Chamber Liaison of excused absences
- In coordination with Chairperson and Vice-Chairperson, help recruit new BRG members when there are open seats in that group.

*Chamber members may be involved in various business activities and can be listed under multiple business categories with the Chamber, but business representation is limited to one business and business category in any BRG. Promoting other activities, or businesses, may jeopardize standing when infringing on other BRG members business category.

Any individual representative of the member organization who leaves their company (no matter the reason) will not remain as a member of that BRG because it is the organization who holds the seat on their BRG. The organization will be given the opportunity to fill that seat if the rostered member leaves their organization. If the organization is unable, or unwilling, to fill that seat, the open position will go to the next organization on the waitlist.

Former members are allowed to reapply under a new organization and are subject to the guidelines in force at the time of reapplication.

Position Title:	BRG Chairperson
Staff Partner:	Membership Executive
Appointment Method:	Currently serving as Vice-Chairperson
Term:	One-year term; renewal maximum of two terms
Time Commitment:	Time is an average of 4 hours per month including creating agendas, and member communications.

- Includes all requirements as a BRG Member
- Serve as a role model for members
- Be a champion for the Chamber
- Maintain a safe and inclusive environment for members, guests, and staff
- Lead BRG meetings
- Implement new processes as approved by the Chamber
- Empowered to delegate tasks for the purpose of improving the group. For example, empowering a member to coordinate an offsite meeting.
- Responsible for acting in the best interest of the Chamber and for effective communication with the Chamber liaison
- Mentors Vice-Chair to become Chairperson
- In collaboration with Chamber staff, recruit new members as seats are available
- Work with Chamber staff on succession planning to ensure bench strength and consistency of BRG leadership

Position Title: **BRG Vice-Chairperson**
Staff Partner: Membership Executive
Appointment Method: Current BRG Chair in partnership with Membership Executive
Term: One-year; renewable
Time Commitment: Time is an average of 3 hours per month including meeting preparation and other related tasks.

- Includes all requirements as a BRG Member
- Assist the BRG Chairperson to lead the group
- Is prepared to lead the group in the absence of the BRG Chairperson
- Serve as a role model for members
- Be a champion for the Chamber
- Maintain a safe and inclusive environment for members, guests, and staff
- Will traditionally succeed Chair in the following year
- Other duties as required

Position Title: **BRG Vice-Chairperson Elect**
Staff Partner: Membership Executive
Appointment Method: Current BRG Member
Term: One-year
Time Commitment: Meeting attendance

- Includes all requirements as a BRG Member
- Will traditionally succeed Vice-Chair in the following year.

Position Title: **BRG Secretary/Program Chair**
(if applicable, responsibilities are assumed by Vice Chair within some groups)
Staff Partner: Membership Executive
Appointment Method: Current BRG Member
Term: One-year
Time Commitment: Meeting attendance

- Includes all requirements as a BRG Member
- Create and maintain a continuous schedule of member presentations
- Coordinate with the presenter prior to each meeting to ensure they have all the needed support and are properly set-up presenter before people arrive (if AV is needed notifying the Chamber liaison)
- Serve as the business card swap collector/distributor, if applicable
- Other duties as required

Position Title: Membership Experience Specialist

Staff Partner: N/A

Appointment Method: N/A

Term: N/A

Time Commitment: N/A

- Serve as primary Chamber contact for assigned BRGs
- Ensure all members of the group are current Chamber members
- Maintains group attendance
- Collect, review, and distribute all new member applications
- Send email reminders, rosters, acceptance, wait list, warning and termination letters, applications for review

Contact Information

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