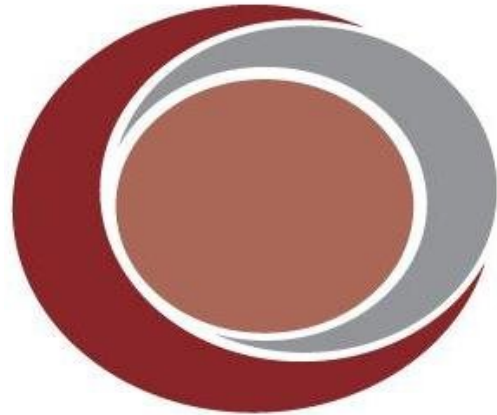


Behind The Moon  
Referral Group



Guidelines, Policies, Code of Ethics and Contractual Obligations

Welcome to Behind the Moon's (BTM's) Referral Group. This information outlines expectations of Members who utilize BTM's Referral Group as a marketing arm for their business. By submitting an Application For Membership, applicants must be in agreement with and accepting of Guidelines, Policies, Code of Ethics and Contractual Obligations provided herein.

Please read this document carefully before accepting to the terms and submitting your Application For Membership.

For more information about Behind The Moon Referral Groups and to access our online application, visit

<http://www.behindthemooninc.com/page.cfm?ID=78>.

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## Guidelines, Policies, Code of Ethics and Contractual Obligations

Acceptance as a Member to one of Behind The Moon's (BTM's) Referral Group signifies you will be a positive and supportive member of the organization as well as a regular contributor to the overall success of your Chapter. This requires not only a commitment to your fellow Chapter Members but also showing up to give rather than to get. In addition, your membership directly links you to the support and betterment of the Chapter's chosen charitable organization and you will make best efforts to support the promotional efforts on behalf of your Chapter's chosen charitable organization.

### Code of Ethics

It is expected that each Member will adhere to the following:

- I will provide the quality of services at the price I have quoted.
- I will be truthful with all members and their referrals.
- I will build goodwill and trust among members and their referrals.
- I will take responsibility for following up on the referrals I receive as well as communicate any outcomes to the referrer.
- I will display a positive and supportive attitude and take any questions, concerns or issues directly to the Vice-President or a member of the Membership Committee.
- I will live up to the ethical standards of my profession.
- I will consistently attend all scheduled Chapter meetings and events as well as pass qualified referrals to the members.

### General Policies

1. Most Chapters will consist of a combination of business-to-consumer participants. However, each Chapter has the ability to designate a focus if they choose. Examples of focus include but are not limited to: business-to-business, size of corporation, executive level professionals, women only, green/sustainable business, etc.)
2. Only one person from each profession or industry will be accepted into a given Chapter.
3. Members must represent their primary occupation.
4. Members are expected to arrive on time and to remain for the duration of the meeting.
5. Members may be a Member of only one Chapter at any given time. Transfers are allowed upon approval of the new Membership Committee.

6. Visitors may visit a Chapter up to two times prior to submitting an application for Membership.
7. Member who are chosen speakers during a Chapter meeting must bring a door prize, valued at less than \$25.
8. Leaves of absence are permitted with the approval of the Membership Committee.
9. Members who wish to change their classification/industry category must submit a new application to the Membership Committee and obtain approval before promoting their new venture.
10. A Member's classification may become open for failure to comply with the terms and conditions outlined herein.
11. Policies are subject to change and/or be modified as directed by The Board or Behind the Moon.
12. In the absence of a Membership Committee, the Leadership Team (President, VP, Treasurer/Secretary) will fulfill this role until a Membership Committee is in place.
13. Members agree to be a member of only one group where exclusivity by industry is a requirement of membership.
14. All Members must attend New Member Orientation within the first 60 days of acceptance to Membership.
15. BTM reserves the right to establish more than one Chapter in a community or city where demand for services are identified.
16. If an existing member desires a transfer to another BTM Referral Group, it requires the approval of the new group's Membership Committee and results in a \$25 transfer fee if approved.

## Meeting Schedule, Absences, Tardies and Substitutions

1. Experience proves that consistent meetings not only attract the best members but also help the create an atmosphere of cohesiveness within the Chapter. As such, all Chapters hold weekly meetings, with the exception of the last week of each month which will be a free week in which no meetings take place. The last week of the month is for the Leadership to hold their monthly meetings.
2. Members are expected to be in attendance at all scheduled meetings as the Chapter's success is a direct result of attendance and participation.
3. Recognizing there are times where conflicts keep a Member from attending a meeting, following are guidelines for absences and tardies to maintain integrity within the Chapter:
  - a. Three absences are permitted in a given six month period.
  - b. Two tardies are permitted. The third tardy is counted as an absence. A tardy represents being 10 or more minutes late to a meeting.
4. In the event a Member is unable to attend a meeting, the Member is encouraged to arrange for a qualified substitute to attend on their behalf, representing the Member and the Member's business. A qualified substitute is someone from the Member's organization, an employee, existing client, customer or friend prepared to represent the Member's business. In such a case, sending a qualified substitute is not counted as an absence.
5. New Member Orientation includes how to effectively prepare a substitute to represent a Member and the Member's business. Basic guidelines include that:
  - a. The substitute is prepared to take your place and represent your business.
  - b. It is the Member's responsibility to inform the Visitor Host that there will be a substitute attending in their place so the substitute can be welcomed and greeted properly.

## Registration Fees, Membership Fees, Dues and Renewal

1. An initial Registration Fee of \$50 is to be paid once Membership is accepted.
2. Membership Fee are \$360 and can be paid up front at a discount or in monthly payments. Monthly payments must be paid via automatic credit card charge on a recurring date identified by Member. Payments equate to \$30 each month. Up front payment is discounted to \$320, a \$40 savings. Existing Behind The Moon Members

("social networking") in good standing can enjoy an additional discount for up front payment and pay just \$295, saving \$65 off the annual Membership Fee.

3. Membership fees are due 30-days prior to the renewal date. Non-payment could result in forfeiture of the Member's industry classification.
4. Members are contracted to pay for the entire year's duration of their Membership. If a Member resigns from a BTM Referral Group, the Member is obligated to pay the remaining balance of their membership. They may choose to continue paying their monthly Membership Fees on the agreed upon recurring date charged to their credit card or may satisfy the remaining balance with a payment in full.
5. All Registration and Membership Fees are non-refundable.
6. Based on the needs of the Chapter, dues may be required to offset the cost of meeting venue, supplies and event costs. Dues vary by Chapter.
7. BTM has a strict policy on returned checks. Any returned checks must be resolved within 3 business days of the discovery by way of a cashier's check along with a \$25 returned check fee.
8. Renewal of an existing Member is based on current standing, attendance, participation and overall value added to the group. Members will be notified 60-days prior to the renewal date of the Member's status and acceptance for renewal.

### Chapter Leadership Team

The Leadership Team for each Chapter consists of the following positions:

President

Vice-President

Treasurer/Secretary

Membership Committee

Education Coordinator

Event Coordinator

Visitor Hosts

The President, Vice-President and Treasurer/Secretary are elected positions. These elected positions are held for a minimum of 12 months and are compensated positions for the number of months each position is held, to be offset in future months of membership.

The following are the roles and responsibilities of each member of the management team:

a. President

The role of the President is to run the Chapter meeting in a professional, timely and orderly fashion. The President also leads the monthly management meeting. Outside of this function, to maintain continuity of the group and protect the integrity of the President's position, the President does not get involved in Membership or ancillary issues relating to Membership.

b. Vice-President

The role of the Vice-President is to track the statistics of the Chapter as well as Chair the Membership Committee. In addition, any reporting that needs to be made to the group is done by the VP.

c. Treasurer/Secretary

The role of the Treasurer/Secretary is to maintain an accounting of the dues paid/owed by Members as well as identify Members that are due to provide their 10 minute forum of education on their business.

d. Membership Committee

The Membership Committee is comprised of the VP as the Chair of the Membership Committee and no less than two additional volunteer Members from the Chapter. The role of the Committee is to review submitted applications for Membership, call on the references provided by applicants for Membership and determine Membership status of application within 7 days of receipt of application. The Membership Committee will meet at least once monthly to discuss potential issues with Member status, if any exist.

e. Education Coordinator

The role of the Education Coordinator is to maintain the group library on books, papers, magazines, etc. concerning effective networking as well as provide a 3-minute education piece for each meeting.

f. Event Coordinator

The role of the Event Coordinator is to plan and prepare for each quarterly Live Social Networking event as well as assist in promoting the Chapter's charitable organization.

g. Visitor Host

The role of the Visitor Host is to ensure visitors are signed in and acts as a liaison to introduced visitors to members and potential power partners within the Chapter. The Visitor Host will address visitor questions regarding membership following the Chapter meeting.

## General Chapter Meeting Agenda

1. Open Networking
2. Welcome visitors, introduce Leadership Team and other Committee Members.
3. Restate the purpose of the BTM Referral Group
4. Education
5. Recognition (done monthly)
6. Pass Business Card Box
7. Induct any new Members
8. 60-second commercials
9. Members introduce visitors and allow for their 60-second introduction
10. Vice President's Report
11. Membership Committee's Report
12. Treasurer/Secretary Announces Member Speaker Rotation and introduces speaker
13. 10 Minute Member Speaker showcase of their business
14. Referrals/Testimonials
15. Referral Reality Check
16. Treasurer/Secretary Report
17. Announcements
18. Door Prize Drawing
19. Close Meeting