



**Santa Barbara Referral Associates**

**Outline of Membership Guidelines**

revised December 18, 2014



## Santa Barbara Referral Associates

### Outline of Membership Guidelines

revised June 20, 2011

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#### 1. Meeting Dates & Times

- A. SBRA will meet the 2<sup>nd</sup> Thursday of each month, over lunch, from 1:00 pm to 2:30 pm. The current meeting place is Marmalade Café, at LaCumbre Plaza, over lunch, from 1:00 pm to 2:30 pm, 3825 State Street, (805) 682-5246.

#### 2. Monthly Membership Dues

- A. Membership dues are \$18 per month, and may change at any time. Membership includes lunch at the monthly meeting. The most influential reason for change is the cost of lunch. SBRA will collect membership dues prior to each calendar quarter for three months. The current quarterly dues are \$54.00. If you are a member of SBRA and you do not attend a meeting, you are still responsible for your dues for that month.

#### 3. Lunch Fees

- A. Lunch is included with membership. The lunch menu is determined by the restaurant. If you do not eat lunch there is no credit for membership dues.

#### 4. How to become a Member

- A. Membership is determined by attendance. If you meet the other qualifications of membership and you attend at least one meeting, you can declare your membership in SBRA. Membership is limited to 30.
- B. You must maintain regular attendance at meetings
- C. Your business category must be unique to the group. You may not become a member of SBRA if your business is in competition with another member of SBRA, unless, you get the permission of that person(s) in SBRA with whom there may be a conflict

#### 5. [www.sbferrals.com](http://www.sbferrals.com) web site

- A. Members of SBRA, have the option, and are encouraged, to be listed on the [www.sbferrals.com](http://www.sbferrals.com) web site. The cost to support the web site is \$10 per Member listed on the web site, per month. Members can have 1 profile page containing text, photos, videos and files for download.
- B. [www.sbferrals.com](http://www.sbferrals.com) billing – Members can be billed monthly, quarterly or semi-annually. All billing is done with a credit card and all receipts are

automatically delivered to Members via their Email address.

- C. Members Personal Email Marketing List – the Member’s page of the SBRA web site has an Email field where visitors can enter their Email address. Members can easily send Email announcements to their visitors from the Member’s password protected web site.
- D. Set up – Please contact Michael Kramer, [mkramer@ameravant.com](mailto:mkramer@ameravant.com), to set up your Member Profile on the web site.

## **6. Absentee Policy**

- A. Meetings per year - There are twelve meetings per year. You cannot be absent more than four times per year. If you are absent more than four times per year or for any two consecutive meetings, you loose your right to exclusively represent your business category. If another person declares your business category, you are no longer invited to attend SBRA meetings, unless you choose another business category to represent, which is not already represented in the group.
- B. Late Attendance & Leaving Early – Any person that arrives 15 minutes late or leaves 15 minutes, prior to the end of the meeting, is considered absent for the meeting, and will be subject to the “Meetings per year” guidelines.

Meetings are for getting referrals and giving referrals. If you are not present during the entire meeting, you are not fully participating in learning of other people’s businesses, which can have a direct effect on your ability to give referrals. In past meetings, members that have habits of arriving late and/or leaving early are perceived at not committed to the group, which directly affects your ability to get referrals. Please make a commitment to be on time and stay the full meeting.

## **7. Guests Attending for Absent Members**

- A. If a member is not able to attend, they may send in their place a guest. The lunch for that guest has already been pre-paid by the SBRA member, through their quarterly membership dues. The guest must speak on behalf of the member they are replacing. They cannot promote their own business. If a guest wishes to promote their own business, qualifying under the guidelines of membership, they may by paying the lunch fee for that meeting.

## **8. Speaker Schedule**

- A. General Information about the Speaker Schedule - Each Member will have an opportunity to give a 10-minute presentation, about their business. At each SBRA meeting, there will be two or three speakers. The schedule of speakers is maintained by the President of SBRA. Speakers are assigned to the schedule in equal rotation with other members of SBRA. New members will be scheduled at the end of the speaking rotation. If a member is

scheduled to speak and cannot speak when assigned, it is the responsibility of the member to find a replacement speaker and notify the President of the change in schedule.

- B. If you cannot speak – If you cannot speak on the date you are scheduled to speak, it is your responsibility to find a replacement speaker. You can exchange with some else or you can give up your speaking time to someone else. It is also your responsibility to notify the President of SBRA of any change in the speaker schedule.
- C. Speaker Schedule Announcements – The speaker schedule will be included in one Email to SBRA members each month.

## **9. Your Business Marketing Materials**

- A. Business Cards – As a Member of SBRA, you are required to maintain at least 20 of your business cards in the card box. These cards are available to other members and for members to pass out to potential leads for your business. They are also given to visitors interested in your business.
- B. Promotional Materials – You may bring promotional materials to the meetings. There will be a separate table set up at each meeting where you can place your promotional materials. During your commercial, you can refer people to pick up your promotional material during or after the meeting.

If you are giving a presentation, during your presentation, you may pass out your promotional material to everyone in attendance.

- C. Special Promotions for SBRA Members – SBRA members are encouraged to have other SBRA members try their service. This helps SBRA members to know 1<sup>st</sup> hand who they are referring business too. SBRA members are encouraged to offer special promotional offers to each other.

## **10. Business Card Holder**

- A. SBRA makes available for your purchase a business card holder, where members keep the business cards of everyone in SBRA. \$6.00 per book.

## **11. Ethical Standards**

- A. Member of SBRA must maintain good ethical standards to remain in SBRA. It is up to the SBRA Leadership to determine if a member has fallen below good ethical standards.

## **12. Best Business Practice**

- A. All members of SBRA are expected to conduct themselves using Best Business Practices for their industry. Any member that is not conducting themselves with professional integrity may have their membership in SBRA

revoked. Anyone hearing of professional integrity issues of SBRA members is asked to report such activity to a member of the SBRA management team.

### **13. SBRA Leadership**

- A. Term – The term for each Director is one year, beginning March 1st of each year. Each Director is encouraged to find a replacement for themselves prior to the end of their Term. A Director may keep their position for a 2nd term. If a replacement cannot be found by the departing Director, the position will be open to a vote by the members of the group. The members of the group may elect to renew the Director for another term, if the current director is willing to serve another term
- B. Decision Making – All available Leadership members will discuss current issues and/or changes in Membership Guidelines. A vote/pole will be taken to determine all final decisions. In the case of a tie, the Director will decide.
- C. Replacement of Current Leadership during a Term – In some cases, it is desired or necessary to replace a Leadership member(s). Any three members may vote to replace any other Leadership member, if that other Leadership member is not fulfilling their responsibilities. If a Leadership member is voted to be replaced, the President or the Membership Director will approach the other Leadership member and let them know they will be replaced. A replacement will be appointed from SBRA members.

If a Leadership member is no longer able to fulfill their responsibilities (for example, they are moving from Santa Barbara), they will notify the other Leadership members and the three remaining Leadership members will appoint a SBRA member to fill the position for the remainder of the Term.

- D. Director – Michael Kramer, Webmaster, 805-455-2399
  - 1. Lead meetings, final say on issues that arise between members or in people seeking membership, responsible for maintaining the Membership Guidelines document and any issue or area not already assigned to another SBRA Leadership person.
- E. Communications Director – Ellen Lilley, Shaklee Products, 967-9394
  - 1. Prepare speaking schedule, send monthly Email notice of meeting and/or events, collect membership listing from Membership Director to include in Email.
  - 2. Maintain current list of all members (name, business, phone & Email), add new members to Email list, take member attendance at meetings, collect lunch fees or other fees and maintain SBRA checking account.