



Guidelines for Referral Group Membership

OVERVIEW

Greater Winston-Salem, Inc (GWSI) is home to some of the longest-running leads groups in the city. The purpose of these groups is to build relationships, share best business practices, and generate referrals or business leads in a non-competitive and supportive environment.

MEMBERSHIP

Membership in a referral group is open to all GWSI members in good standing. Each new member is required to complete an application for membership. Applications will be accepted on a first-come, first-served basis by the date of application. Every effort will be made to accommodate applicants while maintaining one seat per primary business type. Applicants whose primary business type is already represented will be placed on a waiting list until an opening becomes available. Exceptions to allow or disallow participation of a business or entity will be determined by the leadership team not less than one week and not more than three weeks from the time of application .

Membership in more than one GWSI referral group is allowed; however, attendance must not infringe on any other member of the group. When someone with the same business type submits a membership application, the current member must choose which referral group to attend and forfeit their seat in the other group to accommodate the new member.

VISITORS

Visitors are welcomed and encouraged to attend regular meetings before applying for group membership. Members are encouraged to invite guests. Visitors and guests can be members of GWSI or non-members. Visitors and guests may attend meetings twice before deciding to join the group. Non- members of GWSI must join before submitting their application to join the group.

LEADERSHIP TEAM

The group leadership team consists of three (3) volunteer leaders in the following roles: Chair, Vice Chair, and Group Liaison. Each term of service is for one calendar year (January-December). There is no limit to the number of consecutive terms a leader may serve. Nominations for leadership will be accepted at the discretion of the leadership team but no later than the last regular meeting in the month of October each year. A vote by secret ballot will be scheduled by the leadership team no later than the last regular meeting in the month of November each year. An individual must have been a member of the group more than one month to exercise a voting privilege. If it becomes necessary to replace a leader during their term, the process and timing will be at the discretion of the leadership team.



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- Chair
 - Conducts regularly scheduled meetings
 - Implements policies set forth by GWSI and leadership team
 - Delegates, as needed, certain responsibilities to improve the group
 - Acts in the best interest of the GWSI and group members
- Vice Chair
 - Assists the group Chair
 - Conducts meetings in the absence of the group Chair
 - Creates and maintains a continuous schedule of member presentations
 - Regularly communicates with members about group schedules and activities
 - Sends a weekly email to all members outlining the next meeting agenda
- Group Liaison
 - Serves as primary contact with GWSI
 - Announces events and communicates GWSI information
 - Ensures all members of the group are current GWSI members
 - Reviews all new member applications with the Chair and Vice Chair
 - Keeps a current membership list, record of attendance, and referrals
 - Communicates termination of membership with the group and GWSI
 - Maintains a waiting list of potential new members when business categories are filled

ATTENDANCE & PARTICIPATION

Members of the referral groups are expected to attend and participate in regular meetings. If a member cannot attend a meeting, they should contact a member of the leadership team to inform them that they will be absent.

If a member fails to attend four consecutive weeks or attends less than 50% during a three-month period, their seat will be considered open. Members must be at the meeting for at least 30 minutes before leaving to be considered in attendance.

If a group member changes companies, they will not automatically remain in the group. Regardless of business category, they must go through the application process and be reaccepted to the group. Membership in the group will remain with the individual whenever possible.

At each meeting, members are given an opportunity to promote their business through brief “infomercials.” The Chair will determine the length of these infomercials at each meeting, typically 60 seconds. This allows members to share special promotions, new products, good referral sources, etc., with the rest of the group. In addition, a 10- to 15-minute time period will be reserved for a spotlight presentation. Members must schedule a date with the Vice Chair to make a presentation.



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LEADS / REFERRALS

Members are required to facilitate a minimum of three (3) referrals per quarter. If it is apparent that members are not contributing accordingly, they will be contacted by the Group Liaison and the Chair for a review. After a review with the leadership team, a member not meeting the referral quota may be asked to leave the group.

SUBSTITUTES

Members of referral groups are encouraged to send a substitute to represent their business in case of an absence. The substitute must be an employee of the business the member is representing. The substitute must be prepared to give an infomercial about the business and only promote the business that is a member of GWSI.

WEATHER POLICY

If Winston-Salem/Forsyth County Schools are closed, the referral groups will not meet. Travel to any referral group on days of inclement weather should be a personal judgment call.

RECRUITING

Members should only promote products and services during the meeting. Groups are not meant for recruiting employees, volunteers, or otherwise.

GRIEVANCES

Members who have a grievance are encouraged to seek resolution through the leadership team. If a resolution cannot be achieved, the Chair will take the matter to the Director of Member Relations and Engagement for final resolution. These guidelines are in place to provide guidance and direction for our members and the leadership team. At times, we may have situations that are not clearly defined by these guidelines. When these situations arise, the leadership team, in conjunction with Director of Member Relations and Engagement and GWSI staff will determine fair and equitable solutions.

CODE OF CONDUCT

Each group will build trust among its members by adhering to professional standards of conduct and hold themselves accountable to the group with a high standard of ethics in all business dealings.