

GENERAL POLICIES

1. Only **one person from each profession or category (classification)** is allowed to join a Chapter of Rankin Referral Group (hereafter, Group or Chapter). The Membership Committee and/or Leadership Committee of each Chapter have the final authority in relation to classification/category conflicts. NOTE: The terms Category and Classification may be used interchangeably in these Guidelines.
2. Membership is intended to be represented by a member's **primary** occupation.
 - a. Double Classification/Category - A person may also be a member in one additional Category (Secondary Category), provided the 2nd Category is open at the time of application for the 2nd Category, and a membership fee equal to 50% (half) of our regular membership fee is paid for the Secondary Category. This second Classification would be deemed the member's secondary Classification, and require the additional annual membership fee.
 - b. Should another person apply and be accepted as a Member of the Chapter in the aforementioned member's secondary classification, the original member is obligated to forego membership (release his/her membership) in their secondary Classification no later than 90 (ninety) days after notification, thus freeing up the Classification for the new applicant.
 - c. In this instance, the Double Classifier would be entitled to a prorated refund of their secondary classification membership fee, within 30 (thirty) days of the new member filling the classification. This proration would be calculated on a monthly basis.
3. Membership by more than one person from same company or business – Should a business, entity, or partnership operate in multiple Categories, it is permitted to have multiple members in the Group, provided both memberships are duly paid, and different individuals fill each respective Category seat. In this instance, it is permitted for one member to fill in as a substitute for the additional Category seat, provided the member is equally as knowledgeable of that Category's business operation and practices, and fills in as a substitute no more than 50% (fifty percent) of the meetings during any 12-month period of the membership. An example of this may be a plumbing and electrical firm may have two representatives, one to fill the Category of plumbing and the other to fill the Category of electrical. In this instance, the member for the electrical Category may fill in as a substitute for plumbing Category member, but only if the person is knowledgeable of the plumbing aspects of the business and does not serve as a substitute for more than 50% of the meetings during any 12-month period.
4. The weekly meetings last for 90 (ninety) minutes. Members must arrive on time and are obliged to stay for the whole meeting. Meetings typically take place each week during the year, with the exception of the following:

Between the dates of December 17th and January 3rd
Between the dates of June 30th and July 7th

Should the Group decide, for any reason, to conduct meetings during the aforementioned dates, such meetings will not count against any member regarding attendance requirements.
5. An individual member may not be in a second or additional Chapter or another group which allows one person per profession and whose primary purpose is to pass referrals to one another. This is because it substantially reduces their commitment to the Chapter members. It is up to the Membership Committee and/or Leadership Committee to enforce this policy.
6. **Attendance is critical to the group.** If a member cannot attend, a substitute may be sent – as long as they are not members of a similar Group. This will not count as an absence for the original member. Members are not allowed more than three absences during a three-month period or more than twelve absences in any

calendar year. Exceeding EITHER of these absence thresholds may result in removal by the Chapter's Leadership Team or Membership Committee. Members have an obligation to disclose membership in similar groups or organizations.

Should a member exceed three absences during any three-month period, they may have ONE such absence "waived" if the member has provided a Level 4 or Level 5 referral to another member of our Group in the sixty days prior to the excessive (4th) absence.

7. Members are required to bring bona-fide referrals and/or visitors to the Chapter at some point. Chapters may establish a minimum number of referrals and/or visitors that is acceptable to maintain membership.
8. Applications for Membership are required to attend at least one meeting, prior to official membership approval.
9. Visitors may attend Chapter meetings twice, without gaining membership in any calendar year period.
10. Speakers must bring a door prize. Only **members** bringing a visitor or a referral are eligible for the door prize.
11. All new members **must attend a training session with member(s) of the Leadership Committee or Membership Committee** within the first 60 days of joining. Only after attending the training may the new member be added to the 'speaker rotation' for the Chapter. Any new members not attending the training within 60 days of induction into the Chapter, will be subject to having their Classification opened by the Membership Committee.
12. **There are no leaves of absence other than for exceptional medical circumstances or other extenuating circumstances, as determined in the sole discretion of the Group's Membership and/or Leadership Committee.** A member may take up to twelve weeks medical or family leave with the Membership Committee's prior approval **if their dues are pre-paid** for that period of time and they attempt to have someone 'fill-in' during their leave.
13. It is the member's responsibility to file a concern with the Membership Committee of the Chapter if a visitor in any way conflicts with their classification. This should be done **before** the visitor is approved for membership. If there are no complaints, the Membership Committee will 'assume their consent'.
14. Members who wish to change their Classification must submit a new membership application and obtain approval from the Membership Committee for that Classification change.
15. Transferring members must submit a new membership application to the Membership Committee of the Chapter they are transferring to for approval. If approved for transfer, all fees are transferable. NOTE: This applies only in the event that our organization develops and has multiple Chapters.
16. In case of problems with a member, Membership Committees may, at their sole discretion, put a member on probation relating to the member's business practices or commitment to the Chapter.
17. Memberships may be revoked for failure to comply with the policies, Guidelines, and/or the Code of Ethics of Rankin Referral Group. Membership Committees of any Chapter may revoke memberships. In the absence of a Membership Committee, the Leadership Team may fulfill this responsibility.
18. Rankin Referral Group Policies and/or Guidelines are subject to change, in the sole discretion of our Leadership Committee.
19. In the absence of a Membership Committee, the Leadership Team may act as an ad-hoc Membership Committee until one is established.
20. Rankin Referral Group Membership lists are for the purpose of 'giving' referrals and not for soliciting (via e-mail, direct mail or other means) Group members without their prior approval.

21. Other than normal Rankin Referral Group printed materials, members may not use the Rankin Referral Group Intellectual Property (eg. logos, trademarks, names, slogans, copyrighted materials, etc.) to manufacture, distribute, sell, market, or promote any product or service, or otherwise use the Rankin Referral Group Intellectual Property without obtaining the prior written consent of Rankin Referral Group and HĒLĒ Marketing LLC (parent company). Members must agree to abide by the Rankin Referral Group Branding Standards for any permitted use.

ADMINISTRATIVE POLICIES

1. There may be an initial registration fee, in order to initiate or apply for membership of Rankin Referral Group, as established by our Leadership Committee. Fees are paid annually, or as determined by the Leadership Committee. Fees can be paid by check, money order, or credit card, as determined by the Chapter. As of March 2022, Primary Membership has a \$200 (two hundred dollars) annual fee, and a Secondary Category has a \$100 (one hundred dollars) annual fee. The Secondary Category Fee is subject to proration as indicated in Item 2 in these Guidelines. The regular Membership Fee for a Primary Category is NOT prorated, under any conditions.
2. Rankin Referral Group or its parent company (HĒLĒ Marketing LLC) may establish Chapters in any community with people interested in developing a referral-based business. In addition, we reserve the right to open more than one Chapter in any given community.
3. Membership fees are payable 30 days prior to the due date. Members who have not paid by the first meeting of the month they are due are considered late and will be liable for a \$20 late charge. If fees are not paid within 15 days, the member will be officially dropped/removed from the Chapter.
4. Fees are non-refundable, other than as stated in item 2.c. A Certificate of Credit will be given, upon request, to members in good standing for the unused portion of their fees.
5. Fees cannot be transferred from one person to another unless the fees were paid by the same company.
6. Rankin Referral Group maintains strict policy on returned checks. A member has three working days in which to contact the Chapter and resolve the matter. Any returned cheques not resolved within this period will be turned over to collections. All returned cheques will be liable for a minimum \$45 returned check fee, regardless of the reason for said return, including but not limited to insufficient funds, closed account, invalid account, account not found, stop payment, etc. If a member passes a second returned check, that member will be subject to immediate termination, in the sole discretion of the Chapter's Leadership Committee.
7. Rankin Referral Group is a marketing service provided by HĒLĒ Marketing, LLC. Rankin Referral Group or HĒLĒ Marketing reserves the right to discontinue a member's participation in the program.
8. In the event of multiple Chapters in our organization, a member requesting a transfer from their current Chapter to a new Chapter will be required to submit a completed new member application to the Membership Committee of the new Chapter. In addition, if the member has less than 12 months of paid membership credit, they must submit a renewal payment. Or, if the member has more than 12 months of paid membership credit, no additional investment is required. Upon acceptance into the new Chapter, the credit from their previous Chapter will be added to their membership in the new Chapter as well as the renewal time, if applicable.