

Membership Committee Guidelines

Non-discrimination Disclosure Statement

BNI Headquarters require that chapters review and select persons for membership in all job classifications based on qualifications without regard to race, color, gender, religion, national origin, marital status, sexual orientation, age, or disability. BNI will support no chapter's action when in violation of this non-discrimination statement.

BNI's Networking Code of Ethics

When evaluating members due to complaints by others in the membership, please apply the following Code of Ethics to the various situations. This is not meant to be a list of specifics but can be applied in principle to almost any conflict or complaint.

Upon acceptance to BNI, I agree to abide by the following Code of Ethics during the tenure of my participation in the organization:

- 1. I will provide the quality of services at the prices that I have quoted.**
 - 2. I will be truthful with the members and their referrals.**
 - 3. I will build goodwill and trust among members and their referrals.**
 - 4. I will take responsibility for the following up on the referrals I receive.**
 - 5. I will display a positive and supportive attitude.**
 - 6. I will live up to the ethical standards of my profession.**
- Professional standards outlined in a formal code of conduct for any profession supercede the above standards.**

Guideline #1 -- New Application Review Process

- 1. Visitor Host (or any Team Leader or Membership Committee member) receives the applications & payments from visitors and reviews them on site to **confirm they are complete.****

 - A. It is advisable to catch any incomplete sections before the visitor leaves the meeting.
 - B. Application date is the official start date of membership.
 - C. In the event the visitor leaves, follow up on phone/fax for answers to the questions left off.
 - D. If signature is missing, endeavor to get it signed as soon as possible, or hold the application until it is signed at the following meeting.

- 2. Separate each application.**

 - A. Give office copy with form of payment to the Secretary/Treasurer to forward to the BNI Regional office **after** it has been approved by the Membership Committee, and as soon as possible thereafter.
 - B. The full-sized copy goes to the Vice President or Membership Committee member for their review. In the event the Vice President and all Membership Committee members have left the meeting, fax both sides immediately to the Vice President or one Membership Committee member for their review.

3. Notify the President of an accepted or declined application. When the prospective member is declined, the chapter should be notified that the classification is still open. This is an excellent point to make during the Membership Committee report to the chapter during the meeting. The check or a return of fees should be returned to the prospective member immediately.
4. The Secretary/Treasurer forwards the payment and half page of application form to their BNI Regional office within 24 hours of the Membership Committee approval.
5. **The BNI regional office must be notified immediately when an application is declined.**

Declining an Application

Membership Committees should review applications based on information provided by the prospective member. Following are several suggested guidelines for declining an application. This list is not meant to be either exhaustive or binding.

Suggested Guidelines for Declining Applications

1. There is an unacceptable **overlap in classification** between a prospective member and current member (as determined by the Membership Committee).
2. The profession the prospective member listed on the application is **not his/her primary occupation.**
3. One or more **objections** have been filed by members **in writing** regarding the prospective member's type of service, quality of services or product, business ethics or professionalism.
4. The prospective member **does not possess the proper credentials** for his/her profession (where applicable), i.e., licensing required or other certification.
5. The prospective member provided **incomplete or inaccurate information** on the membership application, i.e., no references, or failed to answer the questions listed.
6. The prospective member is **unable to service and/or provide referrals** in the community where the chapter is located.
7. The applicant **cannot commit** to regular and timely attendance.

Guideline #2 – Transferring Member

1. **Member responsibilities:**
 - A. Member may attend chapter meeting only twice as a visitor.
 - B. Advise current Chapter's VP or Membership Committee of transfer and attempt to fill position in current chapter, if possible.
 - C. Obtain a Certificate of Credit, if applicable.
 - D. Fill out a membership application at the new chapter, providing the Certificate of Credit and payment.
 - E. All transferring members with less than 12 months remaining on his/her membership are required to pay a minimum one-year membership and will then be credited with both the paid membership and any remaining months on the Certificate of Credit. No additional fees are required.

- F. Transferring member must attend MSP training within 60 days of approval if it has been more than six months since last attended.

2. Membership Committee Responsibilities:

- A. All transfers of members are accepted or declined at the sole discretion of the Membership Committee of the new chapter.
- B. Verify application is complete.
- C. Review application, check referrals, verify for necessary certification/licensing, etc.
- D. Notify chapter President of accepted or declined application. **The BNI Regional Office must be notified immediately when an application is declined.**
- E. Application date is the official start date of membership.

Guideline #3 -- Renewal Application Review Process

Renewal Process

Membership Committees are responsible for reviewing the participation and productivity of each member. A brief review of all members must occur 90 days prior to the member's renewal date. Membership renewal is not to be considered automatic.

Evaluation Criteria for Reviewing a Member's Contribution:

- a) not bringing sufficient number of qualified referrals or guests
- b) not attending the meeting or consistently showing up late/leaving early
- c) not displaying appropriate professional behavior and/or consistently being ill prepared
- d) refusing to participate in the chapter leadership or support roles
- e) not complying with one of the policies, guidelines, or Code of Ethics.

Winning teams are comprised of self-disciplined members who comply with the team program. When a member begins to show signs of waning participation or is losing enthusiasm for the chapter team, the Membership Committee's first step must always be, "How can we help you get more out of BNI?" Follow-up may be necessitated using the Progressive Coaching Program.

If the Membership Committee **is planning to a) not renew a member, or b) renew on a conditional basis**, then the Membership Committee is to make certain that the appropriate **Progressive Coaching Steps have been followed and documented prior to issuing the declined or conditional renewal status**. When a membership renewal is to be declined or made conditional, the **BNI Director is to be involved** to help ensure that full due process is afforded the member.

Guideline # 4 Implementing Progressive Coaching Within BNI Chapters

BNI attracts many diverse people wherein membership, issues and challenges may arise among the members. The mechanism to handle these challenges is through the chapter's Membership Committee following the guidelines set out in BNI's Progressive Coaching Program.

There will be three general areas wherein a membership issue or challenge may arise:

- 1. Member productivity and contribution to the chapter (referrals & visitors)**
- 2. Interpersonal and inter-business relationship**
- 3. Member participation in the operation of the chapter**

The Membership Committee's goal is to retain productive chapter members by offering help, advice, and assistance about how to improve their respective participation or contribution in the chapter. However, the Membership Committee is authorized by BNI policy to use a Progressive Coaching Process when serious problems persist.

Progressive Coaching:

If offers of helpful suggestion are not successful, the continuing process of formally dealing with a member's problem behavior include:

- Formally indicating to the member how his/her behavior does not comply with BNI Guidelines, Policies, Meeting Etiquette Guidelines or Code of Ethics and offer suggestions about how the member may improve.
- Placing the member on 90-day probation with instructions that the member must show considerable improvement in the specified area.
- Opening the member's category (terminating the membership).

The term "member" refers to both singular and plural as sometimes 2 or more members are involved.

Note:

The Membership Committee and/or Director may be asked to "mediate" a conflict or confer a judgment of guilt. Conducting a formal mediation and/or conferring a judgment of guilt are beyond the scope and authority of BNI. Instead, Membership Committees may offer simple 'common-sense' advice or coaching suggestions that are related to helping the member better comply with the BNI Policies, guidelines and/or Code of Ethics.

Steps to Implementing Progressive Coaching

(To be followed in the event that informal methods are not successful in obtaining satisfactory results.)

Step One

When member displays disruptive or non-complying behavior, the Membership Committee must offer "constructive assistance" to that member by giving him/her specific feedback as to their unsatisfactory behavior within the chapter. A senior member of the Membership Committee is assigned to coach the member on the specific problem and how to improve. All suggestions are given in a professional and nonjudgmental manner. The member may be referred to the BNI Director for further guidance. A **note** of this coaching session is to be kept in the member's file specifying the specific areas discussed, the suggestions for improvement, and the date.

Step Two

The Membership Committee reviews the member's behavior to determine if improvements are satisfactory. If no improvement is apparent after a 'reasonable length of time,' the Membership Committee sends a written letter to the member instructing the person to improve in the *{following specific areas-refer to policy number or specific Code of Ethic}* This letter should

refer to the verbal coaching session already provided and be given to the member in person by the Vice President if possible, or mailed. **(DO NOT e-mail or fax.)** A copy of the letter should go into the member's file and a copy sent to the Director. The letter should be professional and stress helping the member to improve his/her compliance with the BNI program. When applicable, use the sample letters supplied.

Step Three

Upon subsequent reviews, the Membership Committee continues to see an unsatisfactory level of improvement in the member's performance (one counseling session and one warning letter) the Membership Committee may put the member on a 90 day probation. The probation must be in writing and specify the precise areas requiring improvement. The letter must be written in clear, unambiguous wording and refer to the offers of help already provided by the Membership Committee. The member should be advised to interview with the BNI Director to seek advice on how to improve their status within the chapter.

Note: The BNI Director must be informed about the case before a probation letter is released.

Step Four

Once on probation, the member's case must be **reviewed regularly** from the date when the letter was sent to the member. This review will determine if the member may remain in the chapter. If, during the probation the member still attends the chapter, a member of the Membership Committee must interview the member enquiring how the member plans on improving their status and performance. If, at the end of the probation the Membership Committee decides that the member has not improved satisfactorily, they may issue a letter opening the member's classification (letter #3: Policy or Code of Ethics Violation).

If improvements become satisfactory, then the probation may be lifted.

Note: The letter opening a classification must not be sent until the Director has reviewed the case.

Step Five

The regional office should give the member who leaves a BNI chapter an exit interview by phone or in person.

Step Six

The chapter Membership Committee must inform the chapter that the "**category is now open.**" It is important for the chapter to immediately fill the open category.

When these steps are applied to all members equally, a fair procedure is offered to all members. **All information discussed within the Membership Committee is considered confidential and must be strictly kept within the Membership Committee.** It is not pleasant to deal with challenging interpersonal issues, but well-disciplined team members have the opportunity of becoming a winning team.

**The Membership Committee is concerned with the long-term
progress of its chapter!**