

TiPS Network Organization Charter Agreement



TiPS Network Organization Charter Agreement Updated May 5, 2009

This TiPS Network Charter Agreement updated May 5, 2009 outlines the current minimum national standards, policies and procedures developed by the TiPS Network Organization that govern all TiPS Program Chapters, TiPS Program Members, TiPS Providers and the TiPS Program.

The TiPS Program is a Dual Purpose Program A Professional Referral Service for Clients & A Networking Service for Trusted Professionals

The TiPS Program is a free value added “**Professional Referral Service**” created by the TiPS Network Organization for the benefit of clients, customers, and consumers that is offered by TiPS Program Members in the communities they serve.

The TiPS Program is a “**Professional Networking Service**” for the benefit of trusted professionals and businesses who are members of the TiPS Program through a local TiPS Program Chapter.

TiPS stands for “Trusted Professional Service” and is a recognizable symbol that signifies the professional or business has earned a reputation for their “Commitment to Service Excellence”.

This commitment to service excellence is what bonds our TiPS Providers with a common goal, to provide the clients referred to them superior service.

All TiPS Program Members are selected based on our understanding they have earned a reputation of providing excellent customer service and exhibiting overall professionalism.

All TiPS Program Member’s referral recommendations are made based on the belief that the service provider truly shares the TiPS Program’s core values of **integrity, commitment, fairness, credibility, and opportunity.**

Integrity Commitment Fairness Credibility Opportunity

TiPS Network Organization Charter Agreement

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- 1) No Annual Chapter Dues

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TiPS Network Organization Charter Agreement

(Updated May 5, 2009)

Article I

TiPS Network Organization, TiPS Program & TiPS Program Chapters Purpose & Goals

A) Purpose of the TiPS Network Organization

- 1) The purpose of the TiPS Network Organization is to develop professionally organized referral networking groups bonded by trust, shared values and goals.
- 2) To create and maintain an organizational structure that promotes a professional culture of sharing referrals and marketing ideas with a commitment to service excellence.
- 3) To develop and maintain flexible guidelines, policies and procedures to assist and support in the formation of successful referral networking groups called TiPS Program Chapters.
- 4) To provide administrative support in the operation of the locally managed professional referral networking groups.
- 5) To set standards of professionalism to help govern the overall operation and referral activities of local, regional, and the national TiPS Program.

B) Goals of the TiPS Network Organization

- 1) To make the TiPS Brand a recognizable symbol with consumers, customers and clients that stands for a superior commitment to service excellence.
- 2) To make TiPS Program Membership a valuable asset of the professionals and businesses who have earned the designation of Trusted Professional Service Provider also known as TiPS Providers.
- 3) To provide sound on-going leadership, networking training, and professional guidance to the TiPS Program Leaders, TiPS Program Chapters and all TiPS Program Members.
- 4) To help drive incremental business for all TiPS Program Members and TiPS Providers through the TiPS Program.
- 5) To promote the ideas and concepts of Professional Practice Management.

C) Purpose of the TiPS Program

- 1) To provide consumers with confidence that the professionals and businesses who are members of the TiPS Program have earned the designation of Trusted Professional Service Provider because of their reputation for providing excellent customer service and value in the communities they serve.
- 2) To provide consumers a high level of trust in the professionals who are TiPS Program Members because they are committed to provide the highest quality services and they share the core values of integrity, commitment, fairness, credibility, and opportunity that the TiPS Program was founded on.
- 3) To provide TiPS Program Members with the ability to promote their standing and reputation as a Trusted Professional Service Provider.
- 4) To provide TiPS Program Members a value added service to enhance client and customer loyalty to their business.
- 5) To provide business professionals an effective and efficient method to expand their business relationships and referral opportunities.
- 6) To create a professional environment based on trust and a known commitment to excellent service that enables TiPS Program Members to confidently provide their preferred clients, customers and the consumers in their communities a referral to a trusted professional that offers services or products beyond the scope of their own core business as a value added service.
- 7) To provide TiPS Program Members the opportunity and ability to profitably increase the success of their own business.

D) Goals of the TiPS Program

- 1) To foster mutually beneficial relationships between TiPS Program Members (Trusted Professionals Service Providers) and the clients, customers and consumers in the communities they serve.
- 2) To provide consumers with confidence that they are being referred to a trusted professional or business that has gone through a formal due diligence process before being selected as a recommended service provider.
- 3) To provide TiPS Program Members with an additional value added service they can offer (TiPS Program) when their existing clients and customers express a need or want a service that is outside their area of core competency.
- 4) To increase and solidify client and customer loyalty to our TiPS Program Members through the overall superior value and service excellence they deliver as TiPS Providers and as members of the TiPS Program.

- 5) To give all Program Members and TiPS Providers additional opportunities to open a meaningful dialog with other local professionals and businesses about their commitment to excellence in all aspects of the client service experience they provide.
- 6) To increase our TiPS Program Members opportunities to receive quality referrals from a wide variety of local businesses and professionals.
- 7) To help drive incremental business for all TiPS Program Members and TiPS Providers through a professional referral service called the TiPS Program.

E) Purpose of the TiPS Program Chapters

- 1) To provide a superior opportunity on a local level for professionals and businesses to become associated with a professional networking organization that will truly help them grow their business through quality referrals and is structured to benefit their existing clients, customers and the consumers in their community.
- 2) To create locally focused networks of professionals and businesses who share common values and a true commitment to service excellence.
- 3) To provide local professionals with a framework to build a professional culture of sharing based on a common desire to help others succeed.
- 4) To provide an efficient avenue for like minded professionals to build trusted relationships, share business building ideas, and make referrals to other professionals with confidence that the people they refer will receive a high level of service.
- 5) To create a highly positive and productive environment for successful networking.

F) Goal of the TiPS Program Chapters

- 1) To help TiPS Chapter Members grow their business through quality referrals.
- 2) To help TiPS Chapter Members expand their visibility and prestige in the community they serve.
- 3) To help TiPS Chapter Members professionally differentiate themselves as a Trusted Professional Service Provider. (TiPS Provider)
- 4) To help TiPS Chapter Members provide an additional value added service to their client and customers.
- 5) To help TiPS Chapter Members achieve an overall higher level of success in their business.

Article II

“Shared Core Values of the TiPS Program”

TiPS Network Organization & TiPS Program Members TiPS Providers/Trusted Professional Service Providers

- A) The TiPS Network Organization and the TiPS Program was founded on the core values and principles listed below and all TiPS Program Members, TiPS Providers must acknowledge they share these core values before TiPS membership in any capacity will be considered.**
- 1) Integrity**
We pledge soundness and honesty in all dealings with clients, customers and consumers. We pledge soundness and honesty in all dealings with the professionals and businesses with whom we associate with and require the same from them.
 - 2) Commitment**
We regard all associations as a trusted relationship and will give our total attention to the best interest of our clients and customers both now and in the future.
 - 3) Fairness**
We insist that all arrangements work equally well for all parties in both human and financial terms.
 - 4) Credibility**
We will not associate ourselves with professionals, businesses, products or services that we cannot believe in and use with pride and integrity.
 - 5) Opportunity**
We will constantly be alert to changes in the market place, products, regulations, and the economy for the opportunities they create.
- B) The TiPS Network Organization recognizes the most important person is the client so our absolute priority is to provide them with the best products and services available to enhance their lives with less stress and more enjoyment.**
- C) All of the program’s “Trusted Professional Service Providers” also known as “TiPS Providers” must acknowledge that they share the above listed core values and principles which have been adopted by the sponsors and members of the “TiPS Program”.**
- 1) Each “TiPS Provider” must agree to exhibit those values and principles while servicing their own valued clients and all of the clients referred to them through the professional referral service known as the “TiPS Program”.**

Article III

TiPS Network Organization Management Structure & Leadership

A) TiPS Network Organization

- 1) The TiPS Network Organization is a “**Not for Profit Organization**” that will provide administrative support and govern the overall operations and the TiPS Program Members activities relating to the promotion and operation of local, regional, and national TiPS Programs.
- 2) TiPS Network Membership will consist of TiPS Executive Board Members, TiPS Program Executive Committee Members, TiPS Program Associate Board Members, and TiPS Providers. All are also considered to be TiPS Program Members.

B) Management of TiPS Network Organization

- 1) The TiPS Network Organization and the TiPS Network Administrative Headquarters will be professionally managed by the TiPS Network Executive Board Members.
- 2) **TiPS Network Executive Board Member positions shall include:**
 - a) TiPS Network Organization National Chairman
 - b) TiPS Network Organization National President

C) Management of the TiPS Program

- 1) **The TiPS Program will be governed by the TiPS Program Executive Committee**
 - a) They will collectively represent the TiPS Program Associate Board Members and Tips Providers in all TiPS Program matters before the TiPS Network Executive Board and the TiPS Program Executive Committee.
- 2) **TiPS Program Executive Committee positions shall include:**
 - a) TiPS Network Organization National Chairman
 - b) TiPS Network Organization National President
 - c) TiPS Program President
 - d) TiPS Program Vice President
 - e) TiPS Program Secretary
 - f) TiPS Program Chapters Leadership Advocate
 - g) TiPS Program Providers Champion
- 3) **TiPS Program Executive Committee Elections**
 - a) The TiPS Program Executive Committee Members to serve with the National Chairman and National President are elected by the TiPS Network Executive Board and the TiPS Program Associate Board Members.
 - b) TiPS Program Executive Committee Positions are held for one calendar year. (Jan. 1- Dec. 31)

- c) Nominations for the elected positions on the TiPS Program Executive Committee will be accepted by the TiPS Network Organization during a 30 day period prior to the election.
- d) Elections will be held in the forth quarter of each year at least 30 days before year end for the new TiPS Program Executive Committee to assume office on the first business day of the New Year.

4) Voting Eligibility for TiPS Program Executive Committee Positions

- a) All existing TiPS Program Associate Board Members, TiPS Program Executive Committee Members, and TiPS Executive Board Members are eligible to vote in TiPS Program Executive Committee Elections.
- b) TiPS Providers who are not TiPS Program Board Members may not vote in TiPS Program Executive Committee Elections.

D) General Responsibilities of the TiPS Program Executive Committee Members

- 1) The Executive Committee shall be responsible for overseeing the professional operations of the TiPS Program.
- 2) The Executive Committee is responsible for making all decisions that affect the TiPS program from a macro level as a whole but seeks to empower the TiPS Program Chapters to function autonomously within the minimum national standards, policies and procedures adopted by the TiPS Network Organization and the TiPS Program Executive Committee as recorded in the TiPS Network Charter Agreement.
- 3) The Executive Committee is ultimately responsible for resolving disputes and conflicts if the TiPS Program Chapter is not able to resolve the issue independently.
- 4) **Specific TiPS Program Executive Committee Duties include:**
 - a) Overseeing TiPS Program Activities
 - b) Coordinating TiPS Program Marketing Strategies
 - c) Organizing and Supporting TiPS Program Events
 - d) Other duties as the needs arise....

E) TiPS Program Executive Committee Meetings

- 1) The Executive Committee will hold a minimum of one TiPS Program Executive Committee Meeting per calendar quarter.
- 2) The Executive Committee may deem it necessary to hold additional committee meetings to achieve strategic initiatives for the benefit of the TiPS Program.
- 3) A minimum of 4 Executive Committee Members of which one must be a TiPS Network Organization Executive Board Member to constitute an official TiPS Program Executive Committee Meeting

- 4) Each of the quarterly meetings will be open to all active TiPS Program Associate Board Members. Attendance of Non-Committee Members at any additional Executive Committee Meetings will be at the discretion of the committee.
- 5) Professional decorum will be followed at all TiPS Program Executive Committee Meetings to facilitate productive discussions and to assure maximum benefit is achieved for the benefit of the TiPS Program.

F) TiPS Program Special Committees

- 1) The TiPS Network Organization and/or the TiPS Program Executive Committee may from time to time determine the need to create, form or develop special committees to perform specific duties and take on granted responsibilities for the benefit of the TiPS Network Organization and/or the Executive Committee and/or the TiPS Program Chapters and/or the TiPS Program Members and/or TiPS Providers.

G) TiPS Program Associate Board Members

- 1) Each TiPS Program Chapter will automatically have one TiPS Program Associate Board Member.
- 2) Each TiPS Program Associate Board Member will officially represent their TiPS Program Chapter in any and all matters concerning the TiPS Program.
- 3) Each TiPS Program Associate Board Member will have the right to cast votes on each TiPS Executive Committee position up for election and on any special committee elections held or on any general issues that the executive committee has deemed appropriate and/or in the best interest of the TiPS Program to call the issue to a vote.
- 4) Each TiPS Program Associate Board Member will have the right to nominate themselves or any other TiPS Program Associate Board Member for a TiPS Program Executive Committee Position during a 15 day period beginning 30 days prior to the election and they also have the right to second another associate board member's nomination during that same time period.
- 5) Each TiPS Program Associate Board Member has the right to attend and represent their Chapter at all Quarterly TiPS Program Executive Committee Meetings. Attendance at any additional Executive Committee Meetings that are held is a privilege that may be granted by a majority vote of the Executive Committee. This policy is only in place to promote the meeting efficiency with respect to the committee's ability to accomplish the strategic initiatives for which the additional meeting was called.
- 6) Only a TiPS Program Associate Board Member can be nominated for, be elected to, and serve on the Tips Program Executive Committee.

- 7) Only a TiPS Chapter Leader may have the designation of TiPS Program Associate Board Member and vote in elections as a TiPS Program Associate Board Member.

H) TiPS Program Associate Board Members Qualifications & Responsibilities

- 1) All applicants for a position as a TiPS Program Associate Board Member must complete the required TiPS Network Application & Enrollment Forms.
- 2) They have made a written request to form a local TiPS Program Chapter.
- 3) They must be approved by the Application Review Board as a TiPS Program Member.
- 4) They have agreed to be a TiPS Chapter Leader and take an active roll in the promotion of the TiPS Program and their local TiPS Chapter in their community.
- 5) They must be confident that the professionals they recommend for TiPS Program Membership and to be members of their local TiPS Program Chapter are committed to service excellence and the core values that the TiPS Network Organization and the TiPS Program was founded on.
- 6) They must agree to lead their local TiPS Chapter in a professional manner in accordance with the core value of the TiPS Program.
- 7) They must agree to professionally lead by example, upholding no less than the minimum national standards, policies, and procedures outlined in the Tips Network Charter Agreement.
- 8) They must maintain a master list/and file on all active local TiPS Program Chapter Members/TiPS Providers with copies of their application, any approved TiPS Program professional service offering materials, contact information sheets, returned client surveys, etc.
- 9) They must be willing to champion the success of their chapter, their Primary TiPS Providers and the overall success of the TiPS Program.
- 10) They must promote or facilitate or organize or host networking opportunities for Local TiPS Program Chapter Members to network with each other to build trusted relationships and to support a culture of sharing referrals and business building ideas.
- 11) They must represent their chapter on TiPS Program matters that are being addressed or have come before the TiPS Program Executive Committee for discussion or resolution.
- 12) They must be willing to cast votes on occasion in representation of the best interest of their local chapter membership and the success of the TiPS Program.

- 13) They must be an approved financial professional in good standing with the TiPS Network Organization Executive Board.
- 14) They must maintain a position of good standing with the TiPS Network Organization Executive Board and the TiPS Program Executive Committee.
- 15) They may seek nomination for positions on the TiPS Program Executive Committee and serve on the committee if elected by their fellow TiPS Program Associate Board.

Article IV

TiPS Program Administration, National Standards and Charter Agreement

A) TiPS Program Administration

- 1) TiPS Program Administration will primarily be managed by the TiPS Network Administrative Headquarters; however much of the day to day management of operations will be accomplished by the local TiPS Program Chapters.
- 2) The Administrative Headquarters will support each local TiPS Program Chapter with general oversight, guidance, and program marketing support.
- 3) The Administrative Headquarters will act as a clearing house of general program information.
- 4) The Administrative Headquarters will maintain a master list of all active TiPS Program Members/TiPS Providers with copies of their application, professional service offering materials, contact information sheets, and returned client surveys.

B) Specific TiPS Network Organization's Administrative Policies

- 1) All TiPS Program Members are required to conduct themselves with the utmost Professionalism when representing themselves as a TiPS Program Member and when in attendance at any TiPS related event, function, seminar or meeting.
- 2) All TiPS Program related advertisements and promotional materials must receive prior approval from the TiPS Network Organization.
- 3) All TiPS Program related promotional events, functions, & seminars must Receive prior approval from the TiPS Network organization. Regular Chapter Meetings do not need prior approval.
- 4) All TiPS Program Member conflicts, misunderstandings or disagreements that cannot be resolved by referring to the TiPS Network Organization Charter Agreement and/or the local TiPS Program Chapter Charter Agreement in a satisfactory manner should be brought to the attention of the TiPS Program Executive Committee and the TiPS Network Organization Executive Board.

- 5) TiPS Program Membership may be suspended or terminated at the discretion of the TiPS Network Organization if there is sufficient evidence that the Program Member is in violation of the policies outlined in the TiPS Network Organization Charter Agreement or that it is believed to be in the best interest of the TiPS Program.
- 6) TiPS Program Membership is strictly voluntary on the part of the TiPS Program Member and they may terminate their membership in the TiPS Program at any time.

B) TiPS Program National Standards, Policies and Procedures

- 1) All TiPS Program national standards, polices and procedures will be recorded in the TiPS Network Charter Agreement.
- 2) All national standards, policies and procedures outlined in the TiPS Network Charter Agreement must be voted on by the TiPS Program Executive Committee Members and approved by the TiPS Network Organization's Executive Board Members.

C) TiPS Network Charter Agreement Availability

- 1) A copy of the TiPS Network Charter Agreement must be available for reference at all TiPS Program Executive Committee Meetings.
- 2) A copy of the TiPS Network Charter Agreement must be given to all TiPS Program Associate Board Members/TiPS Program Chapter Leaders.
- 3) A copy of the TiPS Network Charter Agreement shall be made available for review to all TiPS Program Members/TiPS Providers upon request.

D) TiPS Network Charter Agreement Changes

- 1) All amendments and changes to the national standards, policies and procedures outlined in the TiPS Network Charter Agreement must be voted on by the TiPS Program Executive Committee Members and approved by the TiPS Network Organization's Executive Board Members.

Article V

TiPS Program Chapters Membership, Local Standards & Chapter Charter Agreement

A) TiPS Program Chapter Membership Standards

- 1) Each TiPS Program Chapter will have the ability and flexibility to operate its local TiPS Program Chapter autonomously within the minimum standards set forth in the TiPS Network Charter Agreement.

- 2) Each TiPS Program Chapter may set its own standards regarding approval for local Chapter Membership as long as they are no less stringent than the national standards and requirements.**
- 3) Each TiPS Chapter may set its own standards and requirements for a member to remain in good standing and be promoted as part of their local Primary TiPS Providers Recommendation List.**
- 4) Each TiPS Program Chapter may seek local member volunteers to perform specific TiPS Chapter related duties and/or responsibilities as long as they are not in conflict with national policies or procedures.**
- 5) All TiPS Program Chapters and Program Members must receive prior compliance approval from the TiPS Network Organization and their local Chapter Leader for all TiPS branded promotional and/or marketing materials used with the public, professionals or businesses.**
- 6) All TiPS Program Chapters and Program Members may hold, host or sponsor TiPS Program related events, functions, seminars, and or meeting with prior approval by their local chapter leadership and the TiPS Network Organization.**
- 7) Each TiPS Program Chapter may set standards and policies regarding local membership professionalism, conduct and behavior as long as they are no less stringent than national standards and uphold the TiPS Program's Core Values.**
- 8) Each local TiPS Program Chapter is encouraged to resolve all minor conflicts, misunderstanding or disagreements at the local chapter level when possible. If a satisfactory resolution is not achieved, it should be brought to the attention of the TiPS Program Executive Committee and/or the TiPS Network Organization for guidance and/or resolution.**
- 9) Each TiPS Program Chapter may adopt local membership suspension & termination policies with the purpose of protecting the reputation and integrity of the local TiPS Program Chapter, the local chapter members, and the TiPS Program.**
- 10) TiPS Program Chapter Membership is strictly voluntary and any TiPS Program member may terminate their membership at any time.**
- 11) Each local TiPS Program Chapter may formally adopt their local chapter standards by achieving approval of a TiPS Program Chapter Charter Agreement.**

B) TiPS Program Chapters Charter Agreement

- 1) TiPS Program Chapter Charter Agreement Adoption & Approval Process**
 - a)** Only a TiPS Program Chapter Leader may submit a proposed Tips Program Chapter Charter Agreement to the TiPS Network Organization for adoption.
 - b)** The proposed agreement must be submitted in writing to a member of the TiPS Network Organization Executive Board for review.
 - c)** The TiPS Network Organization Executive Board shall review the proposed local chapter charter agreement and present it to the TiPS Program Executive Committee Members for review and a vote on approval.
 - d)** The TiPS Program Chapter Charter Agreement must receive a majority vote in favor of the approval by the executive committee and be approved by the TiPS Network Organization's Executive Board before final approval is achieved.
 - e)** In the event of a tie in the vote totals, the TiPS Network Organization's National Chairman will cast one additional vote to determine a majority vote total.
 - f)** The criteria for the review process is to determine if the proposed local Chapter Charter Agreement outlining the local standards, Policies and procedures are more or less stringent than the national standards, policies and procedures and if the proposed chapter agreement will professionally support the core values and goals of the TiPS Program.
 - g)** The proposed local TiPS Program Chapter Charter Agreement shall be given final approval for adoption by the TiPS Network Organizations Executive Board after it has performed a review of the document and has deemed the proposed chapter charter agreement outlines the individual chapter's local standards, policies and procedures are no less stringent than the national standards and establishes a frame work to operate, manage and govern the chapter within the sprit of the national guidelines while being locally beneficial to fulfill the purpose and goals for a Tips Program Chapter.
 - h)** If a proposed local TiPS Program Chapter Charter Agreement does not achieve final approval, the TiPs Program Executive Committee must submit in writing to the TiPS Program Chapter Leader why approval was denied along with recommendations as to changes in the proposal that may secure final approval.
 - i)** The overriding goal of the formal review process is not to place undue restrictions on the local chapter's ability to function autonomously; it is to protect the professional reputation of the TiPS Program and the program's membership.
 - j)** Adoption of the local TiPS Program Chapter Charter Agreement is official and becomes effective only when it has been signed by the TiPS Program Chapter Leader, the TiPS Program Executive Committee Secretary and a member of the TiPS Network Executive Board. If any of those persons are one and the same, it will require an additional TiPS Program Executive Committee Member's signature

- 2) TiPS Program Chapter Charter Agreement Amendments & Changes**
- a)** Only a TiPS Program Chapter Leader may submit proposed amendments and changes to an existing Tips Program Chapter Charter Agreement to the TiPS Network Organization for approval and adoption.
 - b)** All proposed amendments and changes to a TiPS Program Chapter Charter Agreement must be submitted in writing to a member of the TiPS Network Organization Executive Board for review.
 - c)** The TiPS Network Organization Executive Board shall review the proposed amendments and changes to the local TiPS Program Chapter Charter Agreement and present it to the TiPS Program Executive Committee Members for review and be voted on for approval.
 - d)** The proposed amendments and changes to the local TiPS Program Chapter Charter Agreement must receive a majority vote in favor of the approval by the executive committee and be approved by the TiPS Network Organization's Executive Board before final approval is achieved.
 - e)** In the event of a tie in the vote totals, the TiPS Network Organization's National Chairman will cast one additional vote to determine a majority vote total.
 - f)** The criteria for the review process to determine if the proposed amendments and changes to the local Chapter Charter Agreement are more or less stringent than the national standards, policies and procedures and if the proposed amendments and changes to the current chapter agreement will still professionally support the core values, purpose and goals of the TiPS Program.
 - g)** The proposed amendments and changes to the local TiPS Program Chapter Charter Agreement shall be given final approval for adoption by the TiPS Network Organizations Executive Board after it has performed a review of the proposed amendments and changes to the current document and has deemed that the proposed amendments and changes to the chapter charter agreement still maintains the individual chapter's local standards, policies and procedures are no less stringent than the national standards and continues to establishes a frame work to operate, manage and govern the chapter within the sprit of the national guidelines while being locally beneficial to fulfill the purpose and goals for a Tips Program Chapter.
 - h)** If proposed amendments and changes to the local TiPS Program Chapter Charter Agreement do not achieve final approval, the TiPs Program Executive Committee must submit in writing to the TiPS Program Chapter Leader why approval was denied along with recommendations as to modifications in the proposal that may secure final approval.
 - i)** The overriding goal of the formal review process is not to place undue restrictions on the local chapter's ability to function autonomously or to discourage amendments; it is to protect the professional reputation of the TiPS Program and the program's membership.
 - j)** Adoption of the amendments and changes to a local TiPS Program Chapter Charter Agreement is official and becomes effective only when it has been signed by the TiPS Program Chapter Leader, the TiPS Program Executive Committee Secretary and a member of the TiPS Network Executive Board. If any of those persons are one and the same, it will require an additional TiPS Program Executive Committee Member's signature

Article VI
TiPS Program Chapters
TiPS Chapter Formation & Chapter Leadership

A) TiPS Program Chapters

- 1) Each local TiPS Program Chapter must have an approved TiPS Program Chapter Leader.
- 2) Each TiPS Program Chapter shall seek applications for enrollment of trusted local professionals and businesses to become TiPS Program Members and to join their local TiPS Program Chapter as Trusted Professional Service Providers to serve as Primary TiPS Providers for their chapter.
- 3) Each local TiPS Program Chapter will be given the flexibility to manage their chapter for the benefit of their clients and their local TiPS Chapter Members who will be designated as their Primary TiPS Providers.
- 4) Each local chapter may adopt their own standards, policies, and procedures that are no less stringent than the ones outlined in the TiPS Network Charter Agreement.

B) Chapter Leader

- 1) Each Professional who is qualified to be a TiPS Program Associate Board Member may voluntarily apply to form a local TiPS Program Chapter and become a local TiPS Chapter Leader.
- 2) All Chapter Leaders must complete TiPS Chapter Networking Leadership Training to act as a TiPS Chapter Leader.

C) Responsibilities of the Chapter Leader

- 1) Each local TiPS Chapter Leader is ultimately responsible for signing up local Trusted Professional Service Providers (Primary TiPS Providers) for their Chapter Members to network with, refer business to, receive referrals from, and are working to promote the overall success of their local TiPS Chapter.
- 2) To provide on-going education on the TiPS Program and how to maximize the benefits to their business through active participation in the TiPS Program.
- 3) To encourage all chapter members to promote the TiPS program to their clients, customers and consumers in their community as a value added professional referral service based on a commitment to service excellence.
- 4) To provide their local TiPS Providers with assistance in creating TiPS Branded promotional materials including a Professional Service Offering Sheet.
- 5) To provide professional networking leadership. (Lead by Example)

- 6) To provide local chapter members guidance on the preferred professional conduct regarding networking with other local chapter members.
- 7) To provide chapter members with guidance on local referral procedures.
- 8) To provide local Chapter Members with the opportunities to expand their trusted professional relationships.
- 9) To create a professional networking environment that fosters building trusted relationships based on the core values of the TiPS Program.
- 10) To monitor and ensure that all TiPS Program promotional materials and all TiPS Providers marketing materials have been approved by the TiPS Network Organization before being utilized.
- 11) To monitor and ensure that all TiPS Program Members within the local TiPS Program Chapter are abiding by the minimum national standards, policies, and procedures outlined in the TiPS Network Charter Agreement.
- 12) To protect the reputation of the TiPS Program.

D) Chapter Organizational Structure

- 1) **Each local TiPS Program Chapter under the direction of their Chapter Leader may create, develop or adopt a beneficial organizational structure that is believed to be in the best interest of the local TiPS Program Chapter.**
 - a) The organization structure must be outlined in a Chapter Charter Agreement or at a minimum, documented in writing and maintained on file with the TiPS Network Organization.
 - b) Any official local organizational structure adopted by a TiPS Program Chapter must be approved by the TiPS Chapter Leader in writing.
 - c) The Chapter leader may choose to create a Chapter Leadership Council to support the desired local organizational structure or to delegate local administrative needs.

E) Chapter Leadership Council

- 1) **A Chapter Leader may create a Leadership Council for the benefit of their local TiPS Program Chapter.**
 - a) If a Chapter Leadership Council is created within a local chapter it must be headed by and under the direct supervision of the local Chapter Leader.
 - b) This is an optional structure that may provide additional support for the Chapter Leader.

F) Chapter Leader Resignations and Terminations of Position

- 1) In the event of a Chapter Leader's resignation or termination the TiPS Network Organization and the TiPS Program Executive Committee will make a reasonable effort to assist the TiPS Chapter's Members during a period of leadership transition.**
 - a) The local members may choose to continue to operate as a TiPS Program Chapter for a period up to six months with a Temporary Chapter Leader assigned by the TiPS Program Executive Committee and the TiPS Network Executive Board.
 - b) The local members may choose to adopt a new Chapter Leader that meets the approval of the TiPS Network Executive Board.
 - c) Local TiPS Program Chapter Members may choose to seek membership within another TiPS Chapter.
 - d) Local TiPS Program Chapter Members may choose to terminate their TiPS Program Membership.

Article VII

TiPS Program Membership

A) TiPS Program Members Beneficial Dual Purpose

- 1) The TiPS Program is a free value added "Professional Referral Service" created by the TiPS Network Organization for the benefit of clients, customers, and consumers offered by TiPS Program Members.
- 2) The TiPS Program is a "Professional Networking Service" for the benefit of all trusted professionals and businesses who are members of the TiPS Program through a local TiPS Program Chapter.

B) TiPS Program Members & TiPS Providers

- 1) TiPS Program Members are all professionals who are participating in the TiPS Program that are in good standing with the TiPS Network Organization, TiPS Program Executive Committee and their local TiPS Chapter Leader.
- 2) All TiPS Program Members are classified as TiPS Providers.
- 3) All TiPS Program Members must also be a member of a local TiPS Program Chapter.
- 4) Some TiPS Program Members/TiPS Providers may also have titles of distinction as TiPS Program Chapter Leader, TiPS Associate Board Member, TiPS Program Executive Committee Member.
- 5) Some TiPS Program Members/TiPS Providers may carry other titles of distinction and responsibilities within their local TiPS Program Chapter.

C) TiPS Providers

- 1) They are the TiPS Program Members who have been qualified as Trusted Professional Service Providers to participate in the TiPS Program.
- 2) They must have completed a “TiPS Application & Enrollment Form”.
- 3) They must provide acknowledgement they share the TiPS Program’s Core Values.
- 4) They have received a “Signature of Recommendation” from a local “TiPS Chapter Leader”.
- 5) They have been approved by the “TiPS Program Application Review Committee”.
- 6) They must be in good standing with the TiPS Network Organization, TiPS Program Executive Committee and their local TiPS Chapter Leader to seek referrals from TiPS Program Members.

D) TiPS Providers Minimum Requirements & Qualifications (Local Chapter Leadership may be more restrictive)

- 1) Must complete the “TiPS Program Service Provider Application & Enrollment Form”.
- 2) A local TiPS Chapter Member must Know and Trust them enough to recommend them.
- 3) They must share the Core Values of the TiPS Program.
- 4) They must have a Local Reputation of Professionalism.
- 5) They must provide Superior Service in their area of expertise.
- 6) They must be Highly Competent in providing the services they offer.
- 7) They must be Legally Qualified to provide the services they offer.
- 8) Their business must be in Good Legal Standing.
- 9) They must get a local TiPS Program Chapter Leader’s Signature for recommendation on their TiPS Providers Application & Enrollment Form.
- 10) They must maintain the Personal Local Endorsement of the Chapter’s Board Member.
- 11) Clients and customers who are referred to a TiPS Provider may be Surveyed about their experience and their overall satisfaction with the services they were provided.

- 12) TiPS Providers may be dropped from the referral program if they don't maintain the Program's Professional Standards set forth in the TiPS Network Charter Agreement.

E) TiPS Providers Application Review Committee

- 1) The TiPS Providers Application Review Committee will consist of a TiPS Network Executive Board Member, a TiPS Program Executive Committee Member and the TiPS Program Chapter Leader who has provided the "Signature of Recommendation" on the applicant's TiPS Program Application & Enrollment Form.

F) TiPS Providers Application Review Committee Approval Criteria

- 1) Membership is approved based on the committee's understanding that the service provider has achieved a professional reputation for providing excellent customer service and they consistently exhibit a high level of overall professionalism in the business communities they serve.
- 2) They are committed to maintaining their reputation for service excellence and will make every effort to exhibit those values to provide the clients referred to them through this program superior service.

Article VIII

Primary TiPS Providers & Secondary TiPS Providers General Referral Guidance & Recommendation

A) Primary TiPS Providers

- 1) Primary TiPS Providers are specific to each local TiPS Chapter.
- 2) Each TiPS Provider is considered to be a "Primary Provider" for the local TiPS Program Chapter they joined.
- 3) The official distinction of Primary Provider is determined by the Chapter Leader who provided their Signature of Recommendation on the Application & Enrollment Form.
 - a) **It is highly encouraged by the TiPS Network Organization for all TiPS Program Members to first look to make referrals to TiPS Providers/TiPS Program Members within their local chapter. (Primary TiPS Providers)**
 - b) **This referral directive cannot be mandated by the TiPS Network Organization, but should be addressed by the local chapter leadership.**

B) Secondary TiPS Providers

- 1) Secondary TiPS Providers are all TiPS Providers outside of the local TiPS Chapter's Membership.
 - a) **It is highly encouraged by the TiPS Network Organization that referrals should be made to Secondary TiPS Providers when there is not a viable alternative within the local TiPS Chapter.**
 - b) **A referral to a Secondary TiPS Provider is preferred over a referral to a non TiPS Program Member.**
 - c) **This referral directive cannot be mandated by the TiPS Network Organization, but should be addressed by the local chapter leadership.**

C) General Referral Guidance

- 1) It is the general guidance of the TiPS Network Organization that referrals of clients, customers and consumers should be referred between Program Members whenever possible.
- 2) If no viable referral alternative is available within the local chapter, it is highly encouraged the Program Member works with their Local Chapter Leader to seek out a qualified professional offering a needed service to join their local TiPS Program Chapter.

Article IX

Financial Matters & Obligations

A) The TiPS Program is organized as a free professional referral service

- 1) All referrals are provided as a value added service (TiPS Program) based on helping other Trusted Professional Service Providers/TiPS Providers achieve success while helping the client, customer or consumer receive excellent service with less stress and more enjoyment.

B) Networking Referral Fees

- 2) **No referral fees are permitted.**
 - a) The TiPS Program does not allow referral fees between TiPS Program Members under any circumstances.
 - b) No referral fee may be charged to or paid by the client, customer or consumer by the professional or business providing the referral.

C) TiPS Network Organization & Program Membership Dues

- 1) **No annual TiPS Network Organization or TiPS Program membership dues are permitted currently.**

D) TiPS Program Chapter Dues

1) No annual TiPS Program Chapter dues are permitted currently

E) TiPS Network Organization's TiPS Program Budget

1) The TiPS Network Organization is not for profit organization and all administrative activities being performed by TiPS Network Administrative Headquarters are currently being fully funded and sponsored by Jim Harris, National Chairman & Founder of the TiPS Network Organization.



TRUSTED PROFESSIONAL SERVICE PROVIDERS



Integrity Commitment Fairness Credibility Opportunity