



UNDERSTANDING YOUR POSITION

SECRETARY

2023

UNDERSTANDING YOUR POSITION - INDEX

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Board Position Training Video

The LeTip Secretary position training video can be found in LeTip Wired video library search for .Board - Secretary Position Training or click the board training box and click on the .Board - Secretary Position Training video image.

LeTip Core Values

LeTip's Core Values and Guiding Principle exemplify the LeTip culture. These ideals guide us in our everyday actions, define who we are and how we conduct business. Our words not only inspire us, but they remind us that true success is measured by how we—as individuals and collectively—apply them in our everyday lives.

Keep true to these statements and good business practices will follow. When you look for others to join your chapter, look for those who conduct their businesses just as you do, by utilizing these values.

Integrity:

Honesty in all actions.
"Do the right thing."

Loyalty:

Trust and faith in all relationships.
"All for one, One for all."

Passion:

A feeling based on conviction and strongly held desires and beliefs.
"From the heart."

Commitment:

Follow through until you accomplish your desired outcome.
"We practice stick-to-it-tiveness."

Accountability:

Accepting the responsibility for our actions, behavior, and choices.
"If it's to be, it's up to me."

Excellence:

Performing above and beyond normal expectations while adhering to the highest standards. "The best—without peer."

LeTip Creed

LeTip is a professional organization of business individuals, dedicated to the highest standards of competence and service.

Our purpose is the exchange of business Tips. Members will, at all times, maintain the highest professional integrity.

Each business category is represented by one member and conflicts of interest are disallowed.

The Guiding Principle of LeTip International, Inc.

"To intentionally help one another prosper through mutually beneficial relationships, and thus, create an economy that rewards everyone."™

Our Slogan

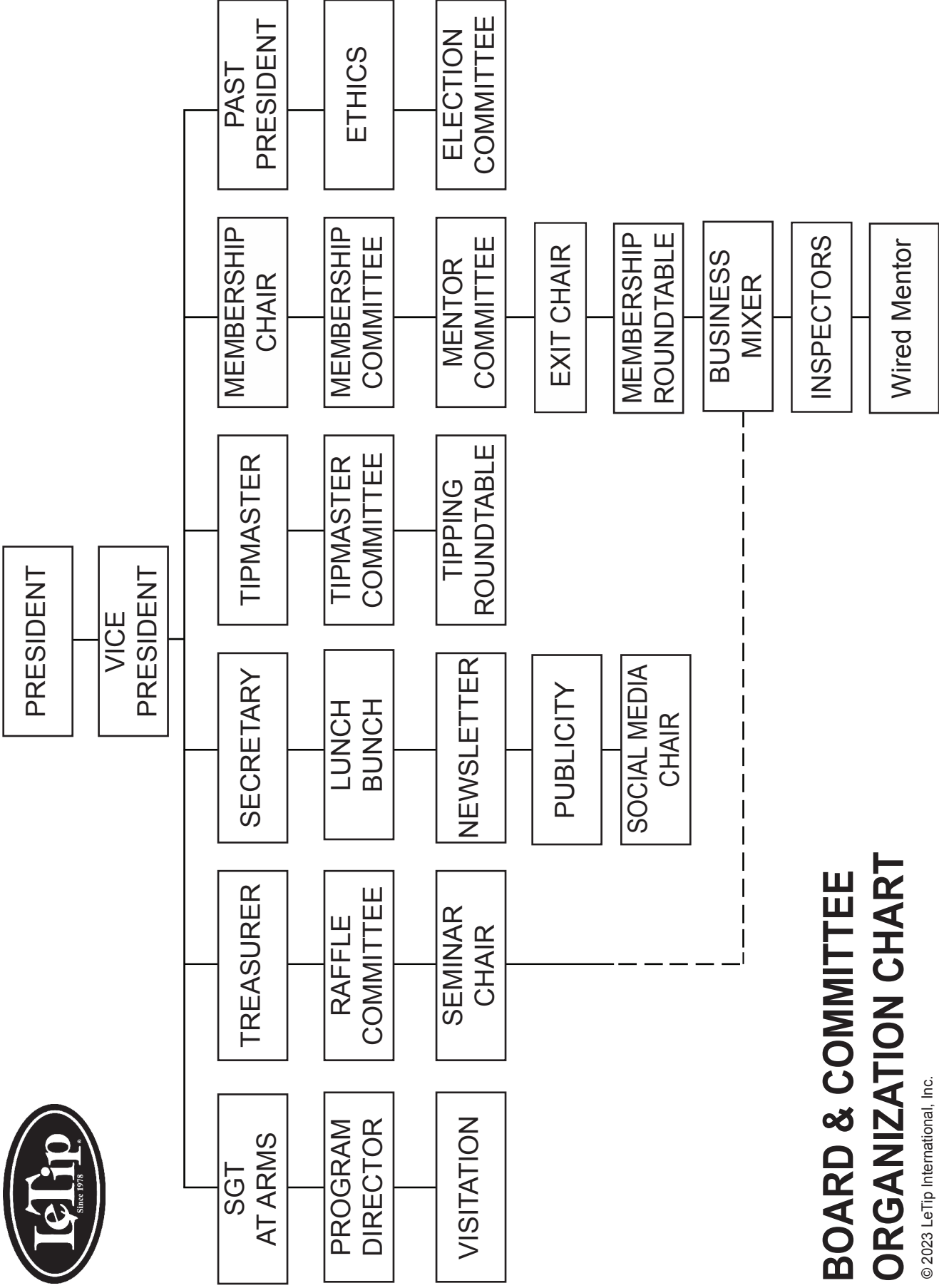
"Dollars In Your Pocket"™

The LeTip slogan, "Dollars in Your Pocket"™, should be used wherever appropriate in all promotional materials. The first and most prominent position of the slogan, in any one document, should always display the trademark symbol (™).

Our Mission

We are committed to the highest ethical standards of conduct. We shall exercise fairness, loyalty and integrity at all times with our members, employees and shareholders.

We are dedicated to a continuous effort for the betterment of our organization, our community and our society. Our actions will always be governed by our dedication to responsible leadership.



BOARD & COMMITTEE ORGANIZATION CHART

SECRETARY DUTIES

The successful Chapter Secretary is an organized, well informed leader.

Often referred to as "The steward of official chapter documents," the Secretary is the chapter's official record keeper and historian. It is a vital position because a chapter typically produces many documents and the Secretary must keep track of all of them. A Chapter Secretary must be an organized, well informed leader. Attention to detail is essential for accuracy of documentation and consistency of record keeping. You are also the historian for the chapter.

Necessary Supplies

The Chapter Secretary will require record keeping and mailing supplies. Any expenses incurred to establish and maintain chapter files must **first** be approved by the Board and are paid for by the Chapter.

1. File Keeping - Yearly and Alphabetical

Keep organized with expandable file folders or a file box which should be brought to every meeting. One folder, divided by the month, will hold Committee Reports, Flyers, Press Releases and other documents, which are filed by the month in which they occur. Board minutes may be kept in a tabbed 3-ring binder or be placed in the monthly file. Files may now also be uploaded and stored in LeTip Wired under the board member tools in the chapter documents file. Member applications are going to online secure applications and a copy is filed with each member's profile.

2. Receipt Book

The Secretary, along with the Chapter Treasurer, should always keep a receipt book to keep a record of members who pay by cash or purchase anything from the chapter. The Secretary will back up the Treasurer in this area.

3. Chapter Letterhead and Envelopes

All chapter correspondence originates from the Chapter Secretary and is produced in a professional manner on chapter letterhead, optional.

4. Warning of Termination Letters (PG #10)

The President or the Board may request that a

Letter of Warning be sent to a problematic member. When this is requested, a letter should be prepared immediately. The Secretary must have on hand a supply of Warning and Termination letters ready to be signed and sent. Keep a copy for the chapter records which you can upload into LeTip Wired under the chapter documents section.

• Termination Letters (PG #11)

If the Board decides to terminate a member, the Secretary will be asked to send that member a letter of termination via certified mail. It is important to retain the certified mail receipts with the member's records. Emails can now also be sent, however, a proof of receipt is necessary and print all email communications between the chapter and member to file with their chapter records. At the next Board meeting the Secretary will notify all Board members of this action, recording the member's name, date, and other pertinent information in the minutes. Keep a copy for the chapter records which you can upload into LeTip Wired under the chapter documents section. From your chapter roster in LeTip Wired you can resign your members in LeTip Wired with the reason for resignation or termination. LeTip is then notified and will remove them from the chapter's roster.

5. Postage Stamps

Keep postage stamps on hand ready to mail members warning or termination letters.

Responsibilities

1. Attend all Meetings

Chapter Board Meetings (12 per year), Chapter Meetings and Special Meetings of the Officers i.e. like Spring Board Training and Fall Board Training.

2. Maintain Continuity

Continuity is assured by accurate record keeping of all documents and the careful transfer of those records to an incoming Secretary. When an outgoing Secretary leaves office, a continuity folder passed on to the incoming Secretary provides an historically correct, chapter record.

These archives will inform future officers and members what issues were brought to the Board of Directors, and why certain decisions were made.

Keep annual reports and chapter information for a minimum of 7 years. Applications, warning and termination letters are to be kept permanently with the chapter records and uploaded and archived in LeTip Wired.

3. Take Board Meeting Minutes

A Secretary is required to take detailed notes during all Board meetings and transpose them into Minutes. (Note: Minutes are not taken at regular LeTip meetings.) The Minutes contain a record of what the chapter did, the decisions that were made and actions that were taken. Minutes are not a record of everything that is said, but rather a record of accomplishments, plans and decisions.

The Minutes from the previous month's Board of Director's meeting are presented for reading and approval during the current Board meeting.

Among the items noted in the minutes are:

- Date, time, and location of meeting
- List of those present and absent
- List of items discussed and reports presented

When the Board Meeting Minutes are completed, they are to be printed and handed out to the following Board Members.

- | | |
|------------------|--------------------|
| • President | • TipMaster |
| • Vice President | • Membership Chair |
| • Treasurer | • Past President |
| • Secretary | • Sgt-At-Arms |

4. File Monthly Reports

Each month the Secretary will ask for written copies of all committee reports. These reports, as well as the monthly Board Meeting Minutes, are to be filed under the month they represent. The monthly reports that are suggested:

- | | |
|----------------------------|--------------------|
| • Attendance | |
| • MembershipChair (guests) | |
| • TipMaster | • Treasurer's |
| • Program Director | • Visitation, etc. |

Chapters using www.letipwired.com to input tips, attendance and guest can simply print the reports for the meeting saving your board members time.



Only chapters inputting their reports into LeTipWired.com will be eligible for the LeTip chapter of the year award.

These reports become the basis of a chapter's Monthly Chapter Report. If your chapter is not using LeTip Wired to input their tips, attendance, and guests, then the Secretary should gather all reports and forward them via email, fax, or mail to: **LeTip International Corporate office** 1826 West Broadway Road, Suite 20, Mesa, AZ 85202.

5. Maintain Monthly Chapter Records

The Chapter Secretary will file and maintain copies of any paperwork that the chapter generates including:

- Bylaws Updates
- Chapter Rosters
- Chapter Resignations & terminations
- Flyer's for Business Mixers & Special Events
- Membership Applications
- Purchase Orders
- Press Releases
- Board Minutes

Also given to the secretary will be copies of **any** paperwork that leaves the chapters hands. This will include warning of termination, membership termination letters, flyer's for business mixers and socials. This is to be kept in a file by month order and the documents can also be scanned and uploaded to the chapters document section in LeTip Wired. Uploading the chapters documents to the chapters section in LeTip Wired also allows the group to be able to shred the paperwork and still have access to it through LeTip Wired indefinitely. All stored information must be kept for a minimum of 7 years. It should be passed from secretary to secretary and stay within the chapter.

Applications: LeTip in 2020 phasing out the carbon paper applications and went digital. Identity theft is a common occurrence now a days and applications sent through the mail often do not make it to their destination put a member's personal information and credit card at risk. LeTip Wired online applications are secure and their payment information encrypted for their protection.

The online Wired application also is a much faster process of enrollment and new members receive their badge and card caddy quicker. Once the new member fills out submits the secure pdf they are sent from Wired, it notifies the chapter board and LeTip International. Then once the chapter has voted on the new member and goes into LeTip Wired and approves their pending application they are instantly enrolled and added to the roster and their name badge and card caddy go out within 24 hours.

Some chapters may still have carbon paper applications and if used the yellow copy of each member's hard copy application should be alphabetically filed by last name and stored with the chapter Treasurer's files. The white copy of the application is sent to LeTip International to complete the new members enrollment.

If the member was sent an online LeTip Wired application, a copy can also be printed to file with the chapter records if desired, but a digital copy attaches to their LeTip Wired profile automatically. All correspondence relating to the member must be kept with the application. This paperwork must remain with your chapter indefinitely. This is confidential information. The only persons (besides the secretary and the respective member) authorized to see this information are current voting Board Members.

Instructions on how to send and approve an online application through LeTip Wired can be found at www.letipwired.com in the Document Library, search Applications and you will see two documents, the first "How to Send" and the document to approve called "How to Approve_online".

You can also contact LeTip at 800-255-3847 and we will gladly show you how and walk you through the process.

6. Maintain Chapter records in LeTip Wired

The Chapter Secretary can now use LeTip Wired to file and maintain copies of any chapter paperwork. Under the board member tools menu option, select chapter documents and the Secretary folder and here any item can be uploaded and archived with the chapter. When a Secretary steps down the new Secretary has access to any history stored in the folder. Upload items such as:

- Bylaws Updates
- Chapter Rosters
- Chapter Resignations & terminations
- Flyer's for Business Mixers & Special Events
- Membership Applications
- Purchase Orders
- Press Releases
- Board Minutes

These uploaded items remain with your chapter indefinitely. This is confidential information that only the Secretary and board members can access. To store documents in LeTip Wired go to www.letipwired.com - once you log in, select from the board member tools menu options (chapter documents). Then select the Secretary folder which will bring up any sub folders created for you to upload chapter documents for chapter archive history.

7. Verify Chapter Information

The Chapter Secretary should ensure the correctness of publicized information, Chapter rosters and information on www.LeTipWired.com and www.letip.com. Notify LeTip corporate of any incorrect information. (i.e.: meeting locations, times, dates, member names) utilized by Chapter Chairs and Committees (Publicity Chair, TipMaster, Newsletter, Membership, Visitation and others as soon as it changes).

SECRETARY SCRIPT

Good Morning (afternoon), my name is _____
and I am the secretary for this chapter and the (your category goes here)
_____.

The first Monday of every month you all receive the emailed newsletter from LeTip corporate called Communicare. It is my job to select articles from the newsletter to share with you each week.

This week I am sharing with you (selected articles) about.....

Please remember to watch for the emailed newsletter on the first Monday of every month to be informed. If you do not receive the email, please check your LeTip Wired settings to ensure your Mailchimp Subscription is set with a current email address. If your email is incorrect, click to unsubscribe, type in your current email and click to subscribe again.

(roughly spend 2 to 3 minutes maximum covering articles from Communicare)

LETIP COMMUNICARE

LeTip Communicare is our digital magazine for members which we send to your emails on file. Communicare started in 2018 and issues go out once a month on the first Monday of the month. If you have never received a copy, check your spam folder to insure it is not being blocked and verify the email address you have on file in www.letipwired.com is current.

LeTip Communicare features short articles on members, chapters and LeTip information to keep members informed of latest LeTip news. Here are just a few of the features covered in each issue.

- Featured recipients of LeTip for the Yearly Awards
- Featured Chapter
- Member Spotlight
- Member Anniversary's
- Member New Badge Announcement (Silver & up)
- LeTip Contest Announcements
- Events and Training Announcements
- LeTip CEO Blog
- Holidays

Member and chapter recognition are important, LeTip also features our members and chapters through the various LeTip social media platforms.

Some chapters already have their own chapter newsletters and social media pages which they use to promote their chapters and recognize chapter members businesses and achievements. If your group would like to share its stories, outstanding members and achievements, please contact LeTip. We would love to include chapters stories of success, testimonials and photos of the group.

Submit your feedback at the bottom of each issue or send suggestions and photos to jbranch@letip.com for future issue consideration.



Issue #029
July 15th, 2019

Mentor of the Year:



Karen Thoms,
Mentor of the Year

Karen has been described by her chapter as pleasant, hard-working, and a great asset to her group. Click below to read more why she was one of the recipients of our Mentor of the Year award.

[Read More](#)

Featured Chapter:



LeTip of La Jolla, CA

LeTip of La Jolla is a veteran LeTip chapter who was created decades ago by the help of LeTip's founder, Ken Peterson, in Sunny San Diego California. Their chapter has grown over 60+ members strong.

[Read More](#)

Communicare example issue July 2019

CHAPTER NEWSLETTER

Staying connected and communication is key to having your chapter members all on the same page and informed. LeTip encourages our chapters to form a chapter newsletter committee. Today most people no longer print a newsletters or chapter announcements and instead are creating digital newsletters that can be sent by email or posted to a website for their members to read and keep up to date with the chapter. There are web-tools out there that make creating these digital newsletters easy to set up. Also watch for "Communicare" LeTip International's digital newsletter. It is sent via email on the first and third Monday of every month.

The chapter newsletter committee should appoint members on the committee to work on different content for the chapters newsletter which can be created monthly, bi-monthly, quarterly, etc. The chapters newsletter should contain content that is important, valuable, and fun information about the chapter and its members.

Here are some examples of topics that can be included:

- Upcoming chapter events
(Mixers, Socials, Board Meetings)
- Upcoming LeTip events
(NTS Training, Board Training, etc.)
- Chapter monthly program schedule
(showboat, greet, speak)
- Chapter visitation schedule
- Chapter goals (updates)
- Spotlight new chapter members
(bios, etc.)
- Featured tips
(passing tips, inviting guests, etc.)
- Member or customer testimonials
- Members anniversary
- Members badge color achievements

Anything your chapter and committee would like to write about. Encourage members to contribute story contest even. Make the chapter newsletter fun, creative design, colors, and photos that bring value to your members in reading. Send your photos to Letip Corporate for social media postings.



Image: (Example of a LeTip digital email newsletter. See the new page article on LeTip Communicare to learn about LeTip's bi monthly digital newsletter for additional tips)

CHAPTER LUNCH BUNCH



Photo Credit: Photographer Adam Cooper of LeTip of Boca Raton, FL

Once a month, the President will ask up to three specialists within the chapter to take the newest member(s) within 30 days of joining to lunch. The chapter will pay for the lunch. (Breakfast or Dinner depending on the chapter). This lunch should last no more than one hour.

The specialist should be anyone who consistently shows up and has great attendance. Anyone who consistently brings guests. Anyone who is a great tipper! These specialists will be training your new member(s) on how to perform within the chapter. They act as mentors, the best of the best.

The Secretary will make the reservations and make payment for the group to go to lunch. The discussion should center around the goals of the chapter. How the new member(s) should wear name badge and lapel pin to every meeting. How to prepare for showboating and last but not least listen to the new member(s) goals. Educate the new members on the importance of Power Partners to help them in tipping.

If you only have one new member take him/her to lunch. If you have more than one, take them all at the same time!

WARNING LETTER EXAMPLE

This is a sample of a letter to be sent to member's who are in jeopardy of losing their membership due to failure of meeting Tip or Attendance requirements.

Dear (Member's Name),

RE: Termination of Membership

- ▶ **ARTICLE IV** in the bylaws applies to your attendance and/or minimum Tip requirement.
- ▶ **ARTICLE IV, Section 4.1(c)**: If I, or my alternate, miss 2 consecutive unexcused meetings, or 4 meetings in a calendar quarter, excused or not, membership shall be under review by the Board for termination. A member arriving late or leaving early at a meeting is not acceptable, and for attendance purposes, will count as an excused meeting for calendar quarter attendance.

and/or

- ▶ **ARTICLE IV, Section 4.1 (f)**: Provide a minimum of 4 Tips per month to any chapter member excludes Inter-chapter Tips).
- ▶ **ARTICLE IV, Section 4.4 (a)**: The board of directors will then measure the personal involvement and attendance at regular chapter meetings of each active member. At the discretion of the board of directors, any active member who, without excuse, shall fail to regularly attend chapter meetings and/or actively participate in the activities of this chapter shall, at the direction of a majority vote of the Board of Directors (quorum required), be terminated and notified in writing by the chapter.

If you have not contacted a member of the board of directors prior to the next LeTip meeting, or if you are not present at the next meeting, your membership will be terminated.

Sincerely,

LeTip of (Chapter Name) Board of Directors

A copy of the Warning Termination Letter is available to download at www.letipwired.com
(Document Library, search Letter_Warning of Termination)

TERMINATION LETTER EXAMPLE

This is a sample of a letter to be sent to member's who are being terminated due to failure of meeting either their Tip or Attendance requirements.

Dear (Member's Name),

RE: Termination of Membership

- ▶ **ARTICLE IV** in the bylaws applies to your attendance and/or minimum Tip requirement.
- ▶ **ARTICLE IV, Section 4.1(c)**: If I, or my alternate, miss 2 consecutive unexcused meetings, or 4 meetings in a calendar quarter, excused or not, membership shall be under review by the Board for termination. A member arriving late or leaving early at a meeting is not acceptable, and for attendance purposes, will count as an excused meeting for calendar quarter attendance.

and/or

- ▶ **ARTICLE IV, Section 4.1 (f)**: Provide a minimum of 4 Tips per month to any chapter member (excludes Inter-chapter Tips).
- ▶ **ARTICLE IV, Section 4.4 (a)**: The board of directors will then measure the personal involvement and attendance at regular chapter meetings of each active member. At the discretion of the board of directors, any active member who, without excuse, shall fail to regularly attend chapter meetings and/or actively participate in the activities of this chapter shall, at the direction of a majority vote of the Board of Directors (quorum required), be terminated and notified in writing by the chapter.

You have been officially terminated from this chapter and from LeTip International, Inc.

Sincerely,

LeTip of (Chapter Name) Board of Directors

A copy of the Termination Letter is available to download at www.letipwired.com
(Document Library, search Letter_Termination)

Notify LeTip International immediately with a copy of the member's termination letter so LeTip can remove them from your chapter roster and open the category for new guests.

CHAPTER BOARD MEETINGS

Why do we have Board Meetings?

Board meetings are held so the board of directors can plan, focus, build, and run the business of the chapter. The board is comprised of up to seven members. These members are the only members who can vote and have the vote counted. They are responsible to the chapter to make sure business is conducted in the most professional manner and the board meeting agenda is consistently reviewed.

Who gets to vote?

Only the following board members are allowed to vote:

- President
- Vice-President
- Treasurer
- Secretary
- TipMaster
- Membership Chair
- Immediate Past President

When should we have our meeting?

According to the LeTip Bylaws, Article VI-Board of Directors, Section 6.4: The board of directors shall meet the first week of each month on the day prior to the weekly meeting day.

A majority of the board of directors shall constitute a quorum for the transaction of business and shall be necessary to give effect to any action of the Board. A majority vote of those present (quorum required) shall be necessary to give effect to any action of the Board. (Quorum = 4 or more members.)

Who should attend?

Any chapter member is allowed to attend board of director meetings. The chapter pays for lunch for the voting members only, however, every member is invited to attend. If, during a board meeting, an issue comes up concerning ethics, all nonvoting members are asked to leave, and the meeting is completed with voting members only.

The monthly board meeting schedule is an important bylaw issue. Member participation is invited, but is usually not possible if the meeting is held just before, or right after, the regular chapter meeting. Members who do not own their own company, but work for someone else, are often prohibited from attending simply because of the time issue.

The Agenda

Those wishing to be placed on the agenda to address the board, or put forth an idea or concern, must make prior arrangements with the vice-president. The board will only hear those who are listed on the agenda prior to the meeting. This keeps the meeting on schedule and diffuses any problems the board may encounter because they were not aware of what issues lay before them.

Rules of Order for Board Meetings

The LeTip Board of Directors holds to two sets of rules when conducting meetings: The LeTip Bylaws (which have precedence) and Robert's Rules of Order. A good reference is The Complete Idiot's Guide to Robert's Rules. This reference guide is easier to understand than Robert's Rules of Order. Knowing these simple rules of conduct will help you run a professional meeting and keep conflicts to a minimum.

A meeting always starts with a written agenda. Below is a copy of an agenda to use as a sample for your own meetings.

Sample Board Meeting Agenda

- I. Call the meeting to order.
- II. Read the minutes from the previous meeting and call for the motion to approve the minutes.
- III. Pass out the written Tip report, attendance report and treasurer report.
- IV. Review the Reports.
 - a. Vote on each report individually, make any corrections necessary.
 - b. Amend the vote if necessary.
- V. Old Business.
- VI. New Business.

Any member wanting to address the board must be placed on the agenda in order to voice their questions or concerns. To be included on the board meeting agenda, members should submit all issues in writing to the vice-president prior to the meeting. Example issues: business, after hours mixers, warning letters, termination letters, committee assignments.
- VII. Adjourn the meeting.

Always list the time of adjournment.

BOARD MEETING AGENDA

Sample Chapter Board Meeting Agenda

LeTip of _____

Date: _____

Call the meeting to order - Time: _____

(Quorum requires 4 board members in attendance)

1. Board Attendance
2. Approval of Board Minutes
3. Tip Master's Report (written 6 copies)
4. Treasurer's Report (written 6 copies)
5. Membership Chair's Report (written 6 copies)
6. Vice President's Attendance Report (written 6 copies)
7. Old Business
8. New Business
9. Misc.

Meeting Adjourned - Time: _____

After the meeting, the completed agenda should be given to the chapter Secretary to file with the chapter records.

A copy of sample board meeting agenda can also be downloaded at www.letipwired.com (Document Library, search Chapter Board Meeting Agenda).

MEMBERSHIP PROCEDURES



Application Mistakes: Applications are sent to LeTip daily with one or more mistakes. Chapter boards often do not catch these mistakes before sending the application to LeTip. This results in the new member's name badge, card caddy and LeTip Wired access being delayed due to their application issues. Sending the applicant the secure online LeTip Wired application not only saves time and is faster, but it will prevent any delays and avoid mistakes such as:

- Category is currently filled (no resignation sent)
- No Chapter name provided
- No Payment method provided
- Wrong amount on check payment (Currently \$440 to enroll)
- No Category selection provided
- Not an official category listed
- No Sponsor provided
- Application was filled out by the wrong person (Only the actual member who will be attending fills out the application, not the owner)

Chapter Transfers: Members may change chapters by submitting a chapter transfer application and \$100 processing fee. The chapter has the right to vote and approve transfer. Boards often send in the paperwork, but not the member's processing fee.

- Member fills out chapter transfer application

- Outgoing chapter president signs off (member leaving is in good standings)
- Application and \$100 fee submitted to board
- New chapter board inspects transfer member
- Chapter and board vote on chapter transfer
- If approved, send application and fee to LeTip

Company Owned vs Personal Owned: who pays for the enrollment fee determines the type.

- Company Owned is paid for by the company and the account belongs solely to the company, not their employee (member attending). If the employee leaves the company, they are no longer a member in the chapter and the company can submit a company replacement to continue with a new representative, or decide to resign their account, closing the membership in LeTip and the chapter.

If a company changes their name, LeTip can only legally change the company's name if the company submits in writing from the owner or president of the company on their letterhead stating the reason for the company's name change. Once received LeTip then can change the name on their membership contract with LeTip and update the systems.

- Personal Owned is paid for the individual and they solely own their account. Personal owned accounts do not have the ability to submit a company replacement to replace themselves in the chapter.

Company Replacements: Only a company owned account has the ability to switch employees. The company replacement must also be qualified in the category the company represents.(Example; a Dentist would need to replace themselves with another licensed Dentist and could not replace themselves with the office manager or receptionist)
The process is now done through LeTip Wired. The board can send the company replacement app to the new employee by going to My Chapter, click Roster and then click the Dark Grey button to the right side of the member's name being replaced. Click the company replacement link and enter the new member's name and email to send them the app. The replacement member fills out the app send to them and provides a payment method for the processing fee of \$75. Once submitted the chapter is notified for their app to be approved.

Category Change: Members may change category by submitting the category request form through LeTip Wired and payment method for the \$25 processing fee. The member goes to My Profile, clicks Network Information and clicks the Blue Request a category change button. Once they fill out and submit the category change application, the board is notified for their category change application to be approved.

Official Categories: Applicant's must select from one of the LeTip official categories. LeTip Wired has a complete list available in the documents library under categories. Chapters may only vote on applications submitted with an official category listed. If the applicant does not fit any of the categories on

the list, they may request for a new category to be created by submitting in writing or email to LeTip a description of their profession, name of the category and company website link if one is available. LeTip will consider the category request and notify the chapter if approved or denied. The chapter is NOT to vote on any applicant applying for a non-official category though until hearing from LeTip.

Resignation & Termination Notifications: Often when a member decides to leave a chapter or the chapter terminates the member, neither the member or the chapter board notifies LeTip. This not only delays a new application submitted by the chapter since the category appears filled, but also prevents LeTip from being able to direct new guests to the chapter when LeTip receives inquiries for openings in their profession.

LeTip has made notifying us of a resignation or termination simple using LeTipWired.com. The board can notify us of a member's status by pulling up the chapter roster in LeTip Wired and clicking the dark grey action button to the right of the member who is no longer in the chapter. Click resign member and please provide the reason why in the notes field and click submit. Our staff then will remove them from the roster.

Split Categories: Some chapters have two members in the same category, LeTip refers to as a split category. However, before any chapter can invite a guest or accept an application from a guest which the category is currently filled by a chapter member, the chapter must first speak to the active chapter member and ask them if they are ok with the chapter inviting the guest for the same category.

If the current member is ok with this and the guest ends up applying for the category, both member's need to sign a letter stating that they both agree to split the category and what each of them will receive Tips for.

If one of the members' ends up leaving the chapter, the entire category reverts back to the remaining member who can then decide if they want to allow the category to be split again before the chapter invites another guest in that category. Not having the signed letter agreement sent in with the new member's application holds up the process while LeTip has to verify the first active member is ok with the splitting of their category.

Both member's wear the same category on their name badge and during their commercials distinguish what part of the category they cover.

Speak Off: Chapters often have multiple people apply for an open category and do not follow the official speak off procedure when selecting the member. In order for any applicant to be part of a speak off for a chapter category, each party involved must have a completed application and fee submitted to the chapter and their chapter inspection completed. If any of these items have not been completed, that applicant is not eligible to participate in the speak off.

You can also download a copy of the LeTip's speak off procedure at www.letipwired.com - Documents Library, search Procedure_Speak Off.

Weekly Program: How does your chapter track their showboater, greeter, speaker, and lucky devil? LeTip took all our chapters input and in the new LeTip Wired the weekly program tool does everything members asked for. This will save your board time, members are notified by email weekly of their assignment and the weekly program schedule is available for chapter member's to view through the LeTip Wired calendar displaying the dates of their assignments. Going dark, no problem, just set the date and the new program adjusts the schedule to skip that week.

Each new member is required per their membership application agreement to take the NTS training course within 60 days of joining. The fee of the NTS class is included in their enrollment fee and once their application is processed they will receive an email with a code to use to schedule an online NTS class. Once completed you will see a green NTS icon next to a member's name on the weekly program schedule list. Example of NTS icon can be seen in the image below.

Some chapter's do not even assign a member to the weekly program until they've completed the NTS training course. This way they are prepared and ready when assigned one of the weekly program options.

LeTip Membership Change Fees: Knowing the LeTip fees will also save the chapter time and delays on items sent to LeTip with the incorrect amount or no payment.

- Chapter transfer _____ \$100.00
- Company replacement _____ \$ 75.00
- Disbanded chapter transfer ____ \$ 50.00
- Category change _____ \$ 25.00

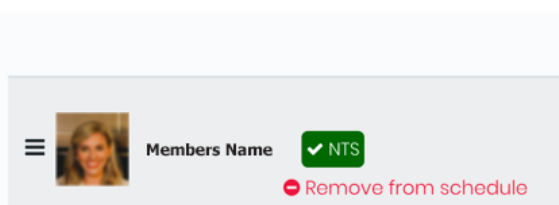
Member's Name Change: Each member application is a legal contract and sometimes a member changes their last name due to marriage or divorce. In order for LeTip to legally change a member's name on record we need them to send us a photocopy of their marriage license or divorce document which shows the name change.

This is attached to their record and once received LeTip then can change their name. The member can purchase a replacement badge then at \$6.00 plus tax and postage, or wait until they earn their next colored badge which is sent for free.

Bylaws: Every member has access to the LeTip Bylaws through the LeTip Wired Document Library, search Bylaws. Questions pertaining to the Bylaws need to go through your area representative.

Program Schedule

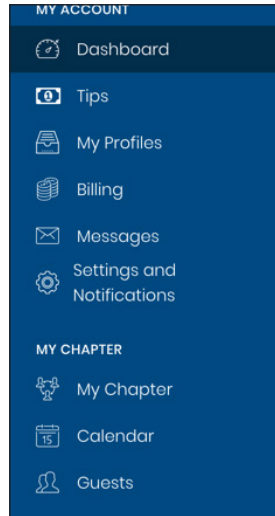
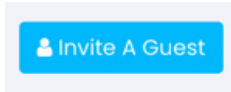
Send



CREATING GUESTS & SENDING AN APPLICATION

All active members can send a LeTip Wired application to a guest. Only The Board Members though can view the submitted applicant's applications for approval or denial. The following steps show the process of sending the LeTip Wired secure online application using LeTip Wired online or on the LeTip Wired mobile app. Let's start first with online, using www.letipwired.com.

Step One: Members can send a secure online application from multiple menu options. Select one of the following menu options to start the process. Dashboard, My Profiles, My Chapter or Guests. On either of those sections, in the top right-hand corner start by clicking the Blue "Invite A Guest" button.



Step Two: Note, you are set as an inviting member and sponsor by default. If you are inviting the guest for someone else, first click the Red "X" to remove your name from the inviting member and then use the magnifying glass drop-down to find their name to assign. Fill out the Invite a Guest form with the applicant's first and last name, phone number, email, and company name if known. Using the drop-down menu, select the chapter name and the category. Next un-check the "Invite guest to a meeting" box. The bottom half of the form changes displaying a personal note/message box for you to send the applicant a note. Once filled out, click the blue "Send Invitation" button to create the guest. (Image below)

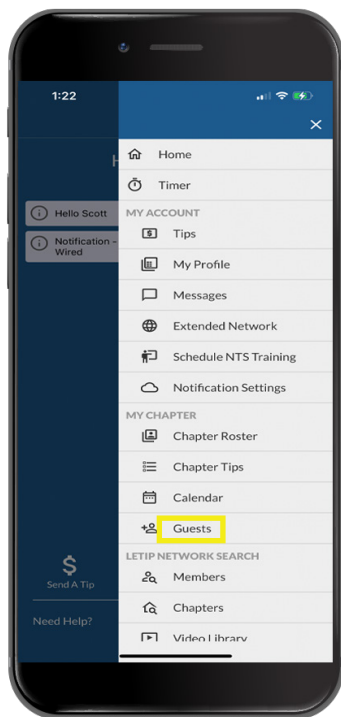
Inviting a Guest to a meeting. If not sending the guest an application and only inviting them to a chapter meeting, go to the document library and search for the 2022 Wired online Guide, pg. 27 about guests for more details.

Step Three: Select Guests from the My Chapter menu options. This section shows who you invited and who the group invited. Click on the guest's name to view their information page, then click the Blue "Send Application" button. (Image below)

Step Four: The final step, all that is left to do now is to verify the sponsor listed is correct. If you need to change it, click the X to remove the name listed and then use the drop-down to find the sponsor to assign. Next, select the chapter name from the drop-down menu and add a personal note/message. Once the fields have been completed, click the Blue "Send Application" button to send the applicant the secure LeTip Wired application. The board will be notified when it has been returned and the board members have the menu tools to view the applications sent out and the ability to approve or deny an applicant's submitted online application.

LeTip Wired mobile - Steps for sending the application to a guest using the mobile application. Below we walk through the process of sending an application using the LeTip Wired mobile app to a guest.

Step One: To send a guest the LeTip Wired application, first touch or tap the "Guests" icon menu option.



Step Two: The Guests page will display listing all the guests you have invited. To add a new Guest, touch or tap "Add New" in the top right-hand corner.

4:28 Back Guests Add New	
Enter search keywords	
Ruth Guzzone Solar Energy Systems Sunroof solar	07/01/21 Invited
Frank Deruvo Payroll Service Ally Payroll Solutions	07/01/21 Invited
Lisa Singer Attorney Wills Trusts and Estates	07/01/21 Attended
Troy Miller Contractor Drywall T.M. Construction & Remodeling	07/01/21 Invited
Vickie Coates Skin Care Cosmetics Mary Kay Consultant	07/01/21 Invited
Jason Radic Pest Control Pure Pest LLC	07/01/21 Invited
Joseph Gerber	07/01/21 Invited
Chris Tong Restaurant Casual Dining Beach Hut Deli	07/01/21 Invited
Cody Hatfield Physical Therapist Therapy Plus	07/01/21 New
Elizabeth Bridgewater Cabinets Evergreen Cabinet Source	07/01/21 Invited
Caddy Ertuik	07/01/21

Step Three: You are set as the inviting member and sponsor by default. If you are inviting the guest for someone else, touch or tap your name to bring up the search field to find the name of the member who is the guest's sponsor. Fill out the "Invite a Guest" form with the applicant's first and last name, phone number, email, and company name if known. Your chapter is set by default, but if it needs changed, touch or tap on the chapter to find the chapter the guest is attending and finally select their category.

4:29 Back Invite A Guest

Inviting Member

Scott Jones

Guest First Name

Guest Last Name

Guest Phone Number

Guest Email Address

Guest Company Name

Chapter

LeTip Headquarters

Category

Tap to choose a category

Did guest already attend a meeting?

☐

Invite to future meeting (email will be sent)

☐

Send guest an application?

☐

Step Four: The final step to send them the application is to touch or tap the circle on/off switch to the right of "Send guest an application?", once you have filled in the guest's contact information. You also have the options to indicate if the guest already attended a meeting or to invite them to a future meeting by touch or tapping the on/off switch to the right of those questions as well. If you choose

4:29 Back Invite A Guest

Guest Phone Number

Guest Email Address

Guest Company Name

Chapter

LeTip Headquarters

Category

Tap to choose a category

Did guest already attend a meeting?

☐

Invite to future meeting (email will be sent)

☐

Send guest an application?

☒

Sponsor

Scott Jones

Personal Note / Message

Send a copy to my email

☐

Create Guest

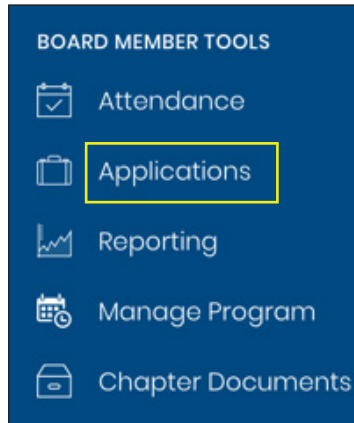
a few more fields will display for you to fill in before finishing and creating the guest. You can add a personal note or message to the guest and choose (if you wish) to also receive an email copy of what the guest will receive. Now simply touch or tap "Create Guest" and they are sent an email with the link to the LeTip Wired application and if selected an invitation to a future chapter meeting.

If you have any questions with the online or mobile sending an application process, please feel free to contact LeTip International at 800-255-3847 or visit our weekly Wired Power Hour (Q&A) every Thursday 12:00 PM PST. The zoom link to the Wired Power Hour can be found in LeTip Wired and selecting the Calendar menu option.

Approving LeTip Wired Applications

Only Chapter Board members can see the Board Member Tools section. Board Members can approve or decline an applicant's LeTip Wired application. The following steps show the process a Board Member would take to approve or deny an application once the applicant has been inspected and voted on.

Step One: Click the Applications menu option to view the chapter's applicant's that have been sent an application through LeTip Wired.



Step Two: Find the applicant's name from the list of applications the chapter has sent, or type their name in the search field to find. If their status shows "Pending", they have not yet sent the application back. Proceed to step 3. If their status shows "Submitted", they've returned the application and are awaiting the chapter's approval. Skip step 3 and go directly to step 4 to approve or decline their application once the chapter has voted on the applicant. (Image below)

Applications						
Find An Application						
	Received Date	Sent Date	Status	Applicant	Chapter	Invited By
1	07/09/2019	07/08/2019	Submitted	Joseph Smith	LeTip of Smithtown, NY	 Joseph Lloyd Financial Advisor

Guest Information	Activity History
Joseph Smith Company Name: Category: Limousine Service Invited By: Joseph Lloyd Phone Number: +1 516-654-7433 Email Address: info@midinteriders.com Application sent on 07/08/2019 Application submitted on 07/09/2019 Application Status: Submitted View Application	07/08/2019 Invited to 07/11/2019 Weekly Chapter Meeting 07/08/2019 Declined invitation for 07/11/2019 Weekly Chapter Meeting 07/08/2019 Invited to 07/10/2019 Weekly Chapter Meeting 07/08/2019 Sent application for LeTip of Smithtown, NY 07/08/2019 Application submitted
Invitations Invite To A Meeting	
07/11/2019 11:31 am LeTip Headquarters	

Step Three: The Application status Blue button will display "Send Reminder" If their application status was "Pending" click the send reminder button to send them the application email again. You may also want to contact them to verify their email is correct, or to inform them to check the spam folder if their email is blocking.

Member Application		View Guest Profile
Decline Application		Approve Application
Chapter LeTip of Smithtown, NY	Category Limousine Service	Submitted 07/09/2019
Contact Information		
Prefix ---	First Name Joseph	Last Name Smith
Profile ---	Gender ---	

Step Four: The top of their application has two boxes to select from. Click Red to decline the applicant and click Green to approve the applicant's application. LeTip Wired then automatically sends them a notification of their status. If approved LeTip Wired automatically completes their enrolment and processes their payment, then it issues the new member's badge and card caddy which is sent to the chapter president. The new member is on the roster and receives an email with their Wired access info.

Approving applications has been made even easier with them being added to the LeTip Wired mobile app. Now at the meeting, as soon as the vote is verified, the board can bring up the applicant's app and tap to approve or decline it on the spot. Once approved the new member is automatically added to the roster, their name badge, card caddy and lapel pin are issued, and the new member receives a receipt for their enrollment fee and a welcome email with their LeTip Wired access information.

Application Types

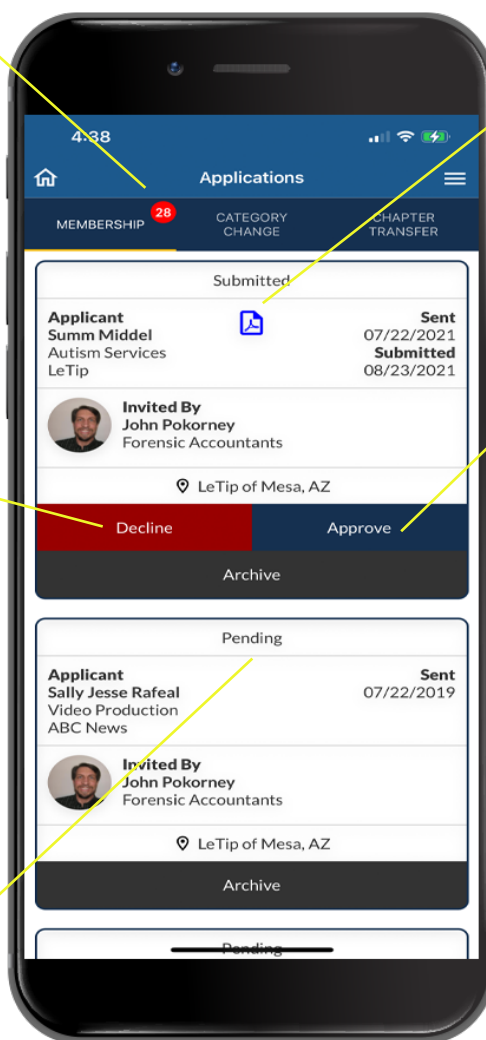
Membership applications show first by default and displays a Red # indicating how many apps have been sent. Switch types by tapping on either Membership, Category Change, or Chapter Transfer. If one of those have been sent and submitted a Red # displays next to the application type

Decline Application

Submitted applications will display first by default, scroll through the apps until you find the member not voted in and then tap the Red "Decline" button. This will remove them from the chapter's applications list and archive their application. They are not charged, and the category remains open.

Pending Status

Indicates the prospect's app has not yet been filled out and returned.



View Application

You can view a copy of their application by tapping on the PDF icon in the center of their contact page.

Approve Application

Submitted applications will display first by default, scroll through the apps until you find the member voted on and then tap the Dark Blue "Approve" button. Approve instantly adds them to the chapter roster and issues their badge, caddy, and lapel pin which is created and mailed to the active chapter president on file.

Application Voting

Chapters should only be voting on someone who has submitted their application and been inspected. Guests are only allowed to attend two meetings. In order to attend week three, they must have submitted an application and been inspected.

If you have any questions with the online or mobile approving an application process, please feel free to contact LeTip International at 800-255-3847 or visit our weekly Wired Power Hour (Q&A) every Thursday 12:00 PM PST. The zoom link to the Wired Power Hour can be found in LeTip Wired and selecting the Calendar menu option.

LETIP COMMUNITY

Think of your Chapter as your home base. Your community awaits you outside your chapter. You have chapters nearby and have a lot in common with them, but now due to the pandemic, you have virtual options that allow you to travel Coast to Coast to meet your new friends and business contacts. Come on one of our weekly zoom calls and meet members from all over the country. Remember a member is a friend you haven't met yet.

We also have LeTip Communicare that is emailed the first Monday of every month. Read up on the featured member and chapter of the month. Who knows you just might be selected as the featured member or chapter of the month. LeTip Wired also soon will have a new community feature we are working on developing right now to also expand your social and networking community so stay tuned for that. Another way to expand your LeTip Community is host joint chapter business mixers, if you've never done one with another chapter, this is a good way to get to know each chapter and network with categories each group does not have as well as grow with the guests each group brings to the event.

Here is the list of the current LeTip Community opportunities to learn from and expand your network.

Weekly Zoom Calls

Wednesday's - Lunch Bunch (Networking)
9am - 10:30 am (PST) / 12pm - 1:30pm (EST)

Thursday's - Wired Hour (LeTip Wired Q&A)
12pm - 1pm (PST) / 3pm - 4pm (EST)

Happening Once a Month

National Leadership Call
Second Monday of the month
9:30am - 10:30 am (PST) / 12:30pm - 1:30pm (EST)

Mortgage Loan Community
Second Thursday of the month
9:30am - 10:30 am (PST) / 12:30pm - 1:30pm (EST)

Training (3 classes options a month)

Network Training Seminar (NTS)
check LeTip Wired calendar for dates and times