



UNDERSTANDING YOUR POSITION

TREASURER

2023

UNDERSTANDING YOUR POSITION - INDEX

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Board Position Training Videos

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

A video for chapter bank accounts can be found in the LeTip Wired video library search for - Treasurer bank account, EIN, and government filing. This training video is prepared by CPA Saranto Calamas who covers what the chapter will need to do to establish an EIN number and government filing.

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.

Kindness:

John Templeton said it best, "it's nice to be important, but it's more important to be nice."

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.

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.

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

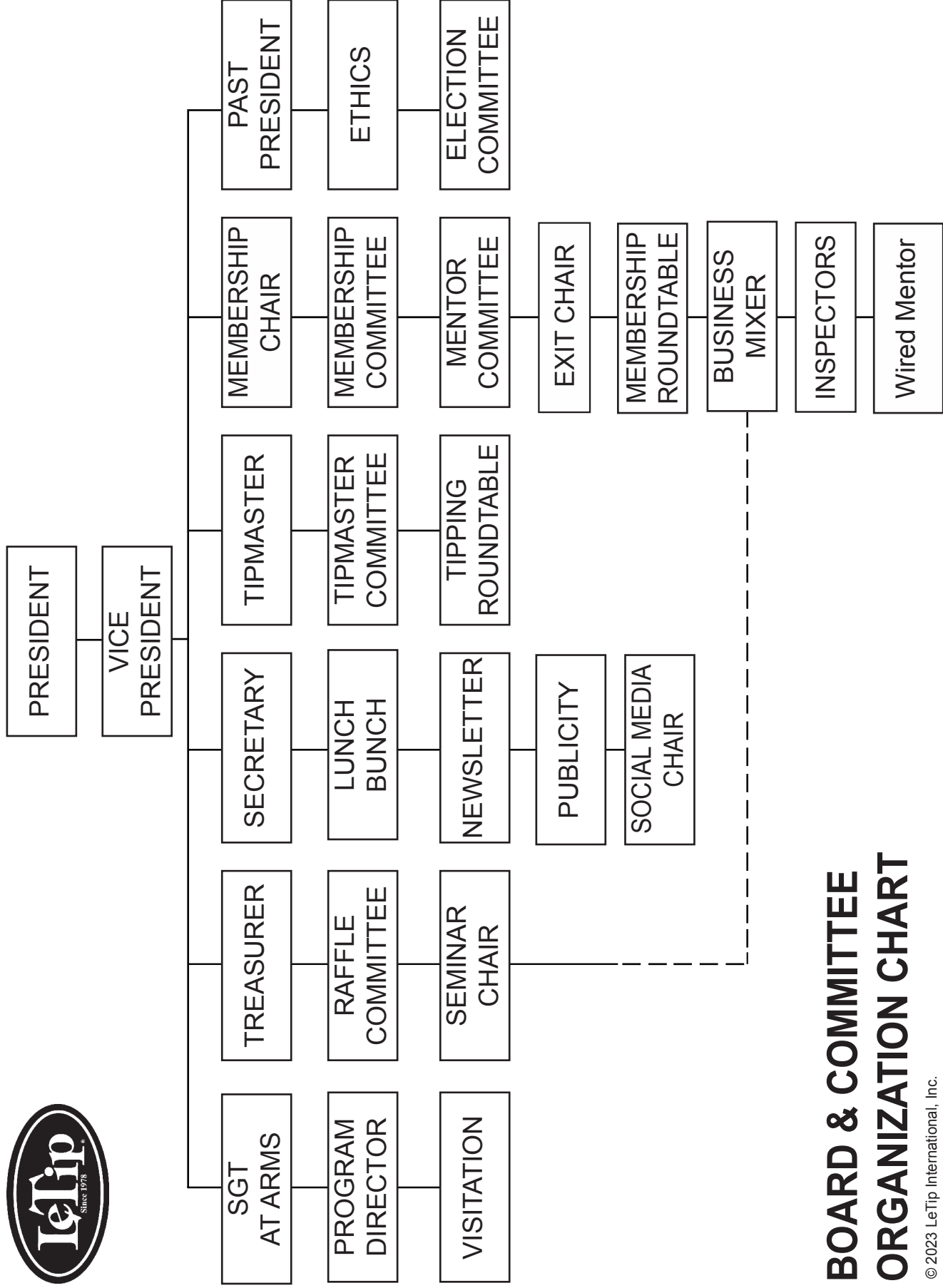
"Dollars In Your Pocket"™

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

TREASURER DUTIES

1. Maintain a record of all chapter dues

- a. When a new chapter opens, all members must drop their weekly dues into the Tip bucket until a chapter checking account is opened. Once a chapter checking account is established, all members, without exception, are to pay quarterly dues to the chapter.
- b. Collect and track quarterly chapter dues, (covers meal and operating costs), as determined by the chapter. Remind members of a \$10/week charge for delinquent dues. Chapter dues are to be paid at the first meeting of the new quarter.
- c. Collect prorated chapter dues from all new members.
- d. Advise the president and vice president of a member's delinquent dues of two or more weeks and request for a warning of termination letter to be sent to the member.
- e. The board of directors handles members in arrears and will suspend these members after 30 days.

2. Open bank accounts

New chapters will need their own checking accounts. A letter of resolution by the board will be required by all banks to open an account. LeTip has provided instructions on opening a chapter checking account and a sample letter of resolution on www.letipwired.com under (documents-procedures-chapter checking account).

- a. Opening a LeTip chapter checking account will require an Employer Identification Number (EIN). To obtain an EIN, you need to visit www.irs.gov and search (apply for an EIN online). The chapter's accountant is the ideal person to help with this task or your bank.
- b. The board prepares a "letter of resolution," for the bank authorizing the opening of a checking account. An authorized resolution needs the signatures of four board members. Request that the bank require two signatures for all withdrawals.

3. Count the cash and pay the restaurant

After meetings, the vice-president and treasurer sit together and count the cash in the Tip bucket. The treasurer pays the restaurant, making up any difference with a chapter check. The treasurer should note on the check how much money was in the Tip bucket). Always do a head count before paying the restaurant.

4. Send applications to LeTip International

Send the top (white) sheet of the application, along with the International dues to LeTip International. Give the yellow copy of the application to the secretary for filing. The member keeps the pink copy for their files. The treasurer requests the Inspector to visit the new member. Once they have been voted on, review the applications for completion before sending to LeTip International, Inc. A member of the board will need to click to approve online applications in order to send them to LeTip. Once approved, they are processed instantly.

5. Two separate application payments

When a new member joins LeTip, two separate dues must be paid: one to LeTip International and the other to the chapter's treasury. If the member is paying by check, the member will not lump these two charges together. Two individual checks must be written. LeTip International receives the membership application dues, the chapter receives the initial chapter dues. If the member is paying by credit card, LeTip International will accept only the International dues. The chapter's dues must be paid in a separate transaction directly to the chapter.

6. Inform members of yearly renewals

All members are invoiced annually by LeTip International for their yearly dues. The invoice is sent on the member's anniversary month. If a payment has not been received 30 days after their anniversary month the member will be terminated.

7. Submit financial reports

Quarterly and monthly financial reports must be submitted to the board of directors. Reconciliation of the chapter checking account should be submitted quarterly.

8. Pay chapter bills

Treasurer is responsible to pay chapter bills but must consult with the appropriate board or committee member prior to paying any bill.

9. Set a chapter budget

Work with the board to establish a budget for mixers, spring board training seminar, fall board training seminar, and events. Any events not budgeted must be voted on and approved by the board. Any amendments to the budget must be approved in writing by the board.

10. Set up an online payment app option

Many chapters accept credit cards and debit cards for payment from members. Here are three of the best payment apps currently out there (Paypal, Venmo, Square Cash). We suggest visiting their websites to learn more about them and to see which of the online payment apps works best.

11. Approve supply orders and receipts

Any expenses incurred to establish and maintain the chapter's financial files must be approved first by the board and are reimbursed by the chapter. The chapter treasurer requires receipts from any board member who orders supplies.



Photo Credit: Photographer Frank Pronesti of LeTip of Lower Bucks, PA

TREASURER SCRIPT

Good Morning (Afternoon), my name is _____ and I am the chapter's (your category goes here) _____ and the treasurer.

If you are a first-time guest, a second time guest, from another chapter or you represent a category already filled within this chapter, please put \$_____ in the tip bucket when it is passed for our 30 second commercials.

Our treasury is in great shape and I will have a written report of our financial status at the next board meeting.

You all are invited to our next board meeting to be held on (date, place and time of board meeting.) Chapter finances will be presented.

Remember:

Our chapter dues are \$_____ and are paid (weekly, then monthly and finally quarterly).

As a gentle reminder...there is a fine for dues not paid on time.

You are responsible for dues whether you are in attendance or not.

Thank you, that is my treasurer's report for this week!

***Do not give any dollar amounts during the regular meeting only at the board meetings.**

A copy of the Treasurer's Script is available to download at www.letipwired.com
(Document Library, search Board Script_Treasurer)

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).

CHAPTER BUDGET & PLANS

Chapter budget plans

A budget is a working tool. It serves as a guide to help members better understand chapter finances and provide direction to grow a fiscally sound chapter. Being proactive in your decisions about spending the chapter's financial resources, is the essential, underlying principle to the budget process.

It is NOT an exact science! And, it will change as the chapter's needs change, and as dictated by the size of the chapter.

Budgets will require review and evaluation to ensure that the chapter stays on track and accomplishes its primary objective... to have the funds to promote the chapter.

A well-planned budget will allocate funds for contests, chamber functions, business mixers, newsletters, postcard campaigns, chapter brochures and other promotional events.

Chapters should also budget funds for lunch bunch meetings, board training seminars, recognition plaques and other such activities deemed necessary by your board of directors.

Chapter future plans

In addition to the budget, a well-run chapter should have a chapter goal. This will help anticipate the chapter's future needs for increasing their budget.

It is not our intent to tell chapters how their budgets and business plans should appear. It is, however, our intent to encourage these tools be incorporated in every chapter and utilized to generate business for every member.

Chapter Budget Review

Elements of your business plan should always include:

- Determining whether or not your current meeting location will suffice a year from now.
- Ways your chapter can reach and exceed membership goals in the upcoming year.
- Evaluating meal costs per member.

Essential Budget Elements

1. Membership today
2. Membership goal in 12 months
3. Cost of meal per member today
4. Number of guests per week today
5. Number of guests per week in 6 months
6. Number of guests per week in 12 months
7. Cost chapter charges to join (local dues only)
8. Loss of members (attrition rate) over year
9. Rent for meeting location (if applicable)
10. \$5'er days
11. Gentle reminders
12. Unqualified guest cost (spouse, friend, etc.)
13. Business mixer cost
14. Board Training seminar costs
 - currently free online, covers spring and fall
15. Board of director meeting costs
16. Chapter Rosters and personal rosters
17. Chamber membership
18. Power Events
19. Advertising, mailings, membership drive
20. Letterhead, envelopes, stamps
21. Chapter newsletter (for members)
22. LeTip banner
23. Tip bucket
24. Miscellaneous costs

We have taken each element and written a short summary to explain how it pertains to the chapter budget.

1. Calculate your membership today

This figure represents the number of members in your chapter today. Use this number as a reference point to help you determine an acceptable budget for the current year.

2. Calculate your membership in 12 months

This figure involves some planning and understanding of what it takes to expand your chapter and will vary depending on how committed your members are to growth. This number represents NET member growth -- (adding new member projections and subtracting members lost through attrition). On average, a well-run, healthy chapter will grow by one new member per month, while losing one

out of every four members during the year. Your chapter may adjust these figures accordingly. It is worth noting that there are some statistical "growth plateaus" that most chapters experience. These plateaus occur at 15-20 members, 25-30 members and at 45-55 members. These periods of stagnation can be offset by chapter contests and high energy levels amongst members.

3. Calculate the cost of meals per member

This is the price of the members' meals. Remember to include the gratuity and sales tax. This figure will vary greatly from chapter to chapter. Depending on the venue, an average meal cost for most chapters is between \$8 and \$12 per person including gratuity. Remember, a meal is NOT why members join, and the location of the meeting is, in fact, far more important than the cost of the meal.

4. Calculate the # of guests per week today

If a chapter wants to pay for a guest's first meal, (and this is not necessary), it should only be done during membership drives. A chapter never pays for unqualified guests, (someone who could not become a member -- an employee, friend, spouse of a member or someone whose profession is already represented in the chapter). For budgeting purposes, only consider first-time qualified guests for meal costs. The sergeant at arms should enforce these rules.

5. Calculate # of guests over 6-months

When estimating chapter growth, anticipate members bringing qualified guests on a regular basis. If your chapter is doing \$5'er days, runs contests and is expanding, then seriously consider these factors when estimating this entry.

Note: On average, a typical chapter will have added one new member a month. To achieve this, at least four qualified guests per month will be required. To **guarantee** one new member per month, six to ten guests are required. Use the corresponding meal cost for six guests as a budget guideline. If your chapter historically has had more guests and is growing at a faster rate than one per month, then use a number that corresponds to your chapter's growth pattern.

6. Calculate # of guests over a 12-months

Follow the instructions in number 5 and expand it to 12 months.

7. Establish quarterly chapter dues

Chapter dues are established by the board of directors. The method by which the board calculates the amount, is based upon a simple cost analysis of guest meals. If it takes four qualified guests to grow by one new member, then it follows that it will cost a chapter the price of four meals. When establishing chapter dues, never charge less than the sum total of four meals, otherwise a chapter will deplete its funds quickly and the cost will become prohibitive for members. Although there are other sources of income, your chapter needs to spend money on items other than guest meals. The dues also help to cover the cost of P.O. boxes, promotions, chapter checking account and general supplies.

8. Calculate members loss over 12-months

It is a fact - throughout a 12 month period, there will be memberships lost. How many depends on chapter maintenance, commitment, and on caliber of people joining. It is possible to estimate what this loss will be in a "typical" chapter. Due to factors which have nothing to do with the chapter itself, about one in four members will resign within a year. For example, if at the end of the year your chapter grew by 12 new members and you had 10 members to start with, it is likely that your chapter will have had five or six people that drop out or are dismissed. Because your chapter is growing, this loss will not have any significant impact on your budget. We have addressed it here because it always comes up in any discussion about the budget. If your chapter isn't bringing in new members, it WILL have an effect on your influence to conduct the chapter and adjustments in the budget will be required.

9. Calculate the meeting location rent (if applicable)

It is rare, but some chapters use facilities that charge for the use of the meeting room. If so, this will certainly need to be included in your budget. As a general rule, this cost is difficult for a new chapter to cover, but as a chapter moves beyond 20 members, it becomes less of an issue. Keep it separate from other costs so that you have an accurate picture of the chapter's finances.

10. Calculate \$5'er Days

The purpose of this event is to grow your chapter! It's simply a numbers game: The more members you have, the more Tips each person will receive. This program is not about building the chapter coffers, but about building the membership.

The program: On \$5'er Day, the chapter requires each member to bring \$5 and a guest. If they bring a guest, they keep their \$5. If they don't bring a guest, their \$5 goes into the Tip bucket. About a third of the members will bring a qualified guest on \$5'er Days.

Example: For a chapter with 15 members, expect five to bring a guest and keep their \$5. Ten members will not bring guests and will put \$5 each into the Tip bucket, bringing \$50 into the chapter. In this example, this income defrays the expenses and adds an additional \$50 to the treasury.

Chapters would rather have a new member, but at least the additional funds can be used for other events that will promote chapter growth (contests, mailings, business mixers).

Pay attention to \$5'er Day income. If a chapter misunderstands the concept and perceives that it is "making money" on \$5'er Day, they are not "making progress." If the chapter is in good financial shape, use \$5'er days as a contest and the member with the most guests that meeting wins the money collected.

11. Gentle Reminders & how they benefit the chapter

Until recently, "reminders" used to be referred to as "fines." LeTip International no longer accepts or promotes this mind set because fines are a penalty, a punishment and negative energy. Members should not feel punished, but rather feel positive about, and responsible to, their chapter and members. Reminders do just what the word means: These gentle reminders allow members to follow the structure. They remind members of the commitment they signed upon joining. LeTip is meant to benefit all, through the hard work of all. In a properly run chapter, reminders will average \$1.50 per week/per member. This is not a great deal of money,

however, what reminders represent is the important issue! The sergeant at arms must select one on the list of gentle reminders to read before circulating the Tip bucket, and ask members not to forget that they are "on their honor" when it comes to paying reminders. Good members will pay; those who don't will eventually leave.

12. Calculate cost for unqualified guests

If the sergeant at arms is performing a thorough job, there will not be any cost here. If a member brings a guest who is not qualified, then that member is responsible for the guest's meal cost. When the sergeant at arms reads the reminders, they should remind members of this cost. This is a way to tell unqualified guests that their meal is not covered and explain the cost to them.

13. Calculate business mixer costs

\$10 per member/per quarter is the average business mixer cost. Chapters are required to hold one mixer per quarter. Business mixers must be approved by the board before the chapter can commit to spend funds. Business mixers count as a regular chapter meeting for guest and member attendance. The chapter has no weekly meeting the week of the mixer, so the cost is further deferred. Business mixers are intended to be an after-hours, or before hours, business meeting. These events provide an informal setting to do business, pass Tips, meet guests, and have door prizes.

14. Calculate for board training seminars

Two times a year, board members and chairs will be required to attend training sessions to help better define their roles in the chapter and cover new material. These seminars are generally held at breakfast times, and it is proper that the chapter anticipate this expense as part of their budget.

Note: To emphasize the importance of training, this fee is always assessed to the chapter regardless of attendance. All board members are invited and, if unable to attend, member substitute(s) must be sent.

15. Calculate board of director's meeting cost

This is not an optional expense for the chapter. Although new chapters may not have the funds for these meetings, it is appropriate for the

chapter to pay for the board of directors to attend these meetings. Chapter leaders give generously of their personal time for the good of the chapter. Once a month the board is required to meet, and LeTip recommends that all officers and Sgt-at-Arms attend. If non-voting members attend, the meal cost is their responsibility.

16. Calculate rosters/brochures cost

The graphic design and printing costs for brochures and rosters is regionally determined. Every chapter should have a brochure which lists its members and their respective occupations. Each member should pass brochures out every week to promote their chapter. Depending on how fancy your chapter wants to get, brochure costs usually range between \$300 to \$1,000 per quarter. An example of a personal chapter roster can be found at www.letipwired.com in the documents library inside the chapters personal rosters (example) file folder.

17. Budget for chamber membership

In most cases, it makes good business sense for the chapter to belong to the local chamber. Two points to consider when determining whether or not a membership is wise are: the size of the chamber and how many members are active in the chamber. Chamber mixers are also a great opportunity for recruiting new LeTip members and help to build good relationships with other business people in the community. The cost generally ranges from between \$150 and \$500, and is well worth the investment.

18. Budget for Power Events

Your chapter will be invited to participate in various functions and LeTip annual power events when scheduled in your area. These provide opportunities to introduce LeTip to other business professionals. These events vary in size and cost, your chapter budget would depend on the size of the group. A group of 16 or more estimate cost could be \$1,600 or more as a fair estimate based on the size of the group.

19. Budgeting for marketing & contests

LeTip is known for "face-to-face" networking. Ads, mailings and mass marketing efforts can also be very effective but require follow-up, just as any prospecting does. Winning contests are another powerful incentive for members!

Winning a prize, getting your next quarterly dues paid... these do work! Setting a part of your budget aside quarterly for this is wise. See pg 9, #7 for establishing quarterly dues.

20. Cost in letterhead, envelopes & stamps

Your chapter will need to set aside funds for mailings which should be coordinated by the secretary. Initially, \$200 will be suggested.

21. Calculate chapter newsletter

Every chapter should commit itself to a quarterly newsletter. A budget should include graphic design and printing costs generated by a quarterly newsletter. Start with a suggested amount of \$500 plus postage. This figure may increase, or decrease, depending on a chapter's size and needs. Don't presume your chapter can do without a quarterly newsletter. It allows the board to communicate with members beyond your weekly meeting. Try online newsletters to save on chapter costs. They have no postage or printing fees and can be distributed quicker by email.

22. Costs for LeTip banners

Image and branding do make a difference. A LeTip banner is a helpful tool for trade shows, socials, and weekly chapter meetings. The LeTip logo is available on the members website (letipwired.com). Documents library, search logo.

23. Costs for Tip bucket, miscellaneous items

A Tip bucket is one of our strongest symbols and a part of our branding effort. It becomes the "talking stick". Do not assume that a box or a plastic container will have the same effect as a silver champagne bucket. When you think of financial success symbols, nothing can compare to an authentic Tip bucket.

24. Costs for miscellaneous items

Miscellaneous costs are actually unexpected financial burdens and should comprise about 3% of your budget. Each chapter's budget will be different in some areas, and will reflect its own unique needs and expectations. Your treasurer should give the chapter a written monthly report showing the actual figures versus the proposed budget. The board of directors should review this information monthly.

CHAPTER CHECKING ACCOUNT

Opening a chapter checking account

LeTip encourages chapters to open a chapter checking account, however, LeTip is not qualified to give your chapter financial advice. LeTip suggests speaking to the chapter's financial advisor and/or bank before opening a chapter checking account for their advice and expertise. Here is our suggestion though on how to open a chapter checking account. First watch the Treasurer bank account, EIN and government filing training video in LeTip Wired's Video Library which will help you prepare before opening a chapter checking account.

1. To open a LeTip chapter checking account, you must first acquire an EIN number from the I.R.S. This will establish Employer Identification Number for your chapter. The form can be found on the I.R.S. website at www.irs.gov under "other". If the chapter has an accountant, they would be the ideal person to handle this.
2. Apply as an association (not as Non-Profit), but as Not for profit Association. The chapter must have account set up as LeTip of (your chapter name).
3. The form can be completed online, or you can print it out and mail it to the address provided on the I.R.S. website.
4. The Board prepares a resolution authorizing the opening of a checking account. We suggest four of your officers have signing authority and that checks require 2 signatures. Any combination of the six board positions can be the four signatories.
5. Must print out a copy of the LeTip Corporate License Agreement and present it to the bank with all three necessary documents. (License Agreement can be downloaded at www.letipwired.com - documents library, search License Agreement_2022)

Example resolution:

Date_____

Therefore Be it Resolved:

1. We approve the opening of a checking account by (list four board members by name).
2. The account is to be in the name of "LeTip of _____".
3. It is required that four signatures appear on the account signature card.
4. Two signatures are required for withdrawal at all times.
5. Account is to be opened at:

Bank's Name

Bank's Address

City, State, Zip

President's signature

Vice-President's signature

Secretary's signature

Treasurer's signature

A copy of Board of Directors Resolution is available to download at www.letipwired.com
(Document Library, search Bank Account)

CONTEST'S & RAFFLE'S

Who doesn't like to enter contests and purchase raffle tickets for the chance to win a prize? Many of our LeTip chapters around the country hold contests and raffles designed to grow the chapter. Check first with your state's laws pertaining to contests and raffles before holding them to ensure your chapter is compliant with state laws. The chapters committee for contests and raffles should always first check with the board and Treasurer to establish a budget allowed for a gift or cash prize award.

Chapter contests can be held to increase tipping, guests, membership, etc and often are a fun way to re-energize the chapters members into participating if the group has slowed down in growth and tipping. Tipping contests are designed to increase chapter tips. They also can be tied into chapter contests to increase guests and growth. The more fun and incentives the contest or raffle have, the more member participation.

Raffles

As mentioned above, first ensure your chapter is compliant with any state laws before holding a raffle. Chapters often use raffles as a way to increase the chapters funds which the chapter can later use towards business mixers, trainings, chapter outings, etc. There are various types of raffles chapters hold.

50/50 Raffle: Is the most common raffle where members purchase a raffle ticket and the chapter has a drawing and the winning raffle ticket wins half of the money collected and the other half of the funds collected the Treasurer adds to the chapters bank account.

Showboat Raffle: The weekly chapter showboater(s) could hold a raffle to give away a prize if they wanted to. The showboater decides on the prize. The raffle committee then sell the tickets and after the meeting the showboater receives all the funds collected. Prior to the start of the meeting, draw and announce a winner.

Business Mixer Raffle: Chapters often give prizes away at business mixer events. The business mixer committee prior to event arranges a budget with the Treasurer to determine the amount that can be spent on a prize. The chapter prize is often given away using the 50/50 raffle or sometimes just having guests and members drop their business card

in a bowl to draw from. Members showboating also have a prize to raffle away sometimes which they announce during their commercials.

Contests

The purpose chapters hold contests is to grow the chapter through fun competition. First establish a prize budget amount with the Treasurer. Then the board and contest committee create the contest, guidelines and prize(s). The chapter can break members into teams or hold it as all individual entries. Some chapters create their contests around themes or sports and set a point system awarding points per various tasks during the contest period. (plus points for positive achievements such as passing tips, bringing guests and them joining chapter and minus points for no tips, no guests, absence from meeting, etc.)

Here are some ideas for chapter contests

Sports (Football, Baseball, Soccer, Hockey, Nascar, etc.), Themed (Pirates, Western, etc.), Most Guests Invited, Most Outside tips passed, Chapter Halloween costume contest, Best showboat contest Awarded end of year (so every member had a chance to showboat)

Baseball example Pts (chapter can set point value)

Home Run (guest & outside tip)	5 pts
Triple (guest joins chapter)	4 pts
Double (2 outside tips)	3 pts
Single (outside tip)	1 pts
Strike out (no guest & no tip)	- 3 pts
Ground out (no tip)	-2 pts
Benched (absent)	-3 pts

Set a contest time frame and come up with something fun and engaging. Remind the chapter of the prize and provide weekly contest updates so the members in the know where they stand in the contest and how much time is left. There is no right or wrong contest idea and the success of achieving the chapters contest goal (growth, more tips, guests, etc.) will be determined by chapter members participation. Prize incentives also don't always need to be a prize or cash. The prize could be a discount off members quarterly dues, store gift cards. etc. Everyone likes that winning feeling so create your own contests and awards. LeTip encourages chapters to hold contests as a way to increase chapter participation.

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

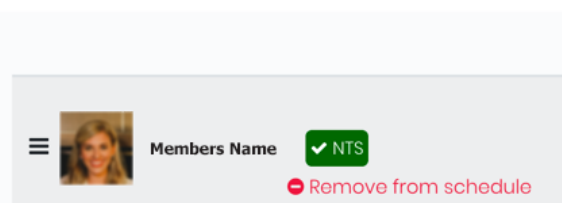
Member's Name Change: Each member application is a legal contract and sometimes a member changes their last name due to marriage or divorce. In order for LeTip to legally change a member's name on record we need them to send us a photocopy of their marriage license or divorce document which shows the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

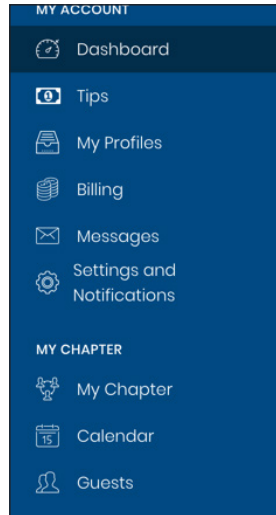
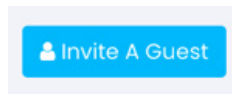
Send



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)

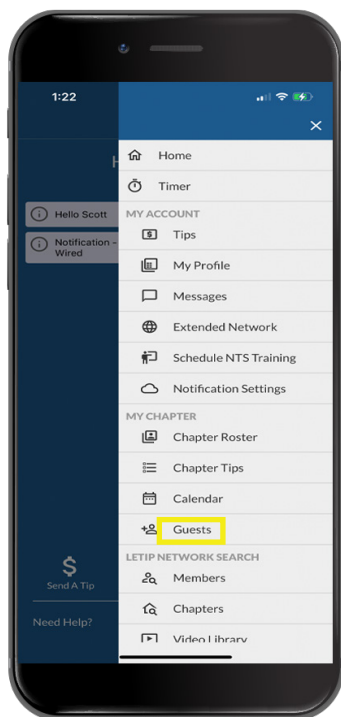
Inviting a Guest to a meeting. If not sending the guest an application and only inviting them to a chapter meeting, go to the document library and search for the 2022 Wired online Guide, pg. 27 about guests for more details.

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 Ertulik		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

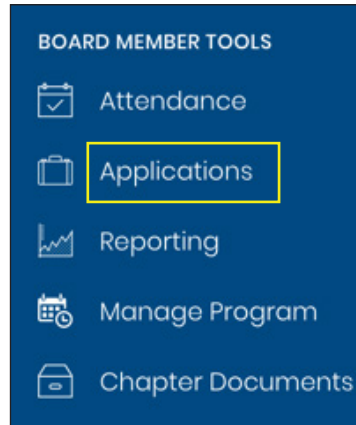
one of those options a few more fields will display for you to fill in before finishing and creating the guest. You can add a personal note or message to the guest and choose (if you wish) to also receive an email copy of what the guest will receive. Now simply touch or tap "Create Guest" and they are 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: Limousine Service Category: Joseph Lloyd Invited By: +1 516-654-7433 Phone Number: info@midniteriders.com Email Address:	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 07/09/2019 Application submitted
Application sent on 07/08/2019 Application submitted on 07/09/2019 Application Status: Submitted View Application	
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
1 Contact Information		
Profile ---	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

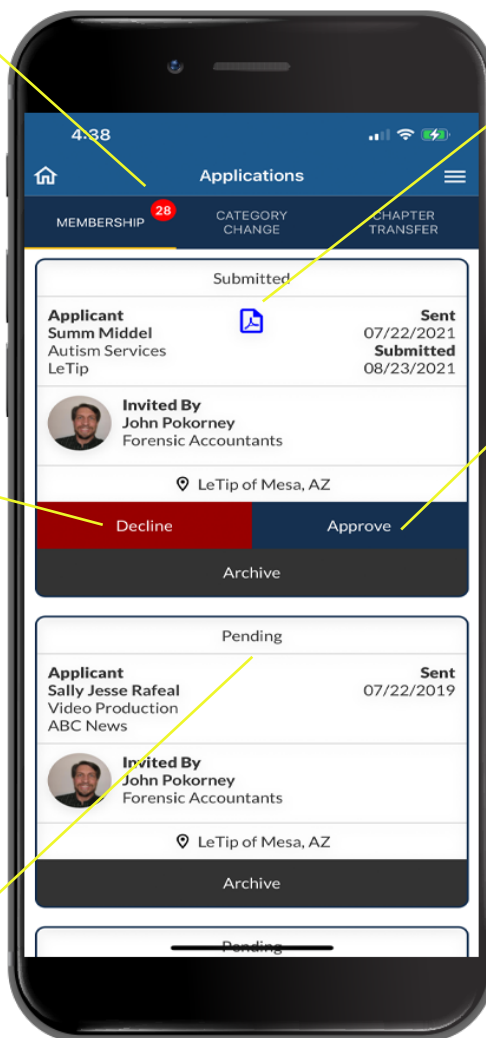
Membership applications show first by default and displays a Red # indicating how many apps have been sent. Switch types by tapping on either Membership, Category Change, or Chapter Transfer. If one of those have been sent and submitted a Red # displays next to the application type

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.

Please visit our LeTip Wired Calendar at www.letipwired.com (calendar) this is the best way to learn and expand your network through the LeTip Community.

Our monthly LeTip Zoom calls, trainings, and events are hosted by some of the top leaders in LeTip and a great opportunity to share the knowledge learned with your chapter.