**Membership Discount Reciprocity Agreement**

Many sustainability organizations (Regional Collaboratives, Coalitions, Networks, etc.) rely on public agencies and other institutions for membership and revenue from dues. Dues pose challenges to the organizations in their ability to recruit and retain members, as well as to the prospective members in terms of limited budgets and competing priorities.

Organizations can recruit and retain more members by offering reciprocal membership benefits in the form of discounts.

Organizations that agree to Membership Reciprocity shall honor a 25% discount from their dues when entities seek multiple memberships. The discount can only be applied between two organizations. For example, if an entity seeks membership from a third Participating Organization, then only the 3rd Organization shall offer a discount.

The Membership Reciprocity Agreement is a universal agreement amongst all Participating Organizations (Organizations). Organizations must sign this agreement, acknowledging the terms.

Please email completed applications to Garrett Wong at gwong@co.santa-barbara.ca.us.

TERMS

Organizations agree to:

* Honor a 25% discount promotion to Entities wishing to seek multiple memberships from Participation Organizations, as listed in Appendix C
* Be publicly listed as a Participating Organization
* Provide the contact information for the Organization lead (such as Chair, Executive Director, Membership Director, Manager, etc.) and billing contact
* Promote other Participating Organizations to current members
* Offer Membership Reciprocity Applications to current and prospective members
* Retain submitted Membership Reciprocity Applications for record keeping and tracking
* Coordinate with Participating Organizations when invoicing and remitting dues for each applicable year

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ORGANIZATION

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AUTHORIZED REPRESENTATIVE

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SIGNATURE

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\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DATE

**APPENDIX A**

**RECIPROCITY SCENARIOS AND PROTOCOLS**

**Scenario A:** **Entity is currently a member of Organization A, and wishes to join Organization B.**

1. Entity contacts Organization B to express their interest in joining by:
	1. Completing Organization B’s Membership Application and the Membership Reciprocity Application.
2. Organization B notifies Organization A that Entity is requesting a 25% discount and shares the completed Membership Reciprocity Application.
3. Organization A reviews and signs the Membership Reciprocity Application and returns to Organization B and paid invoice for Entity’s current dues.
4. Both Organizations coordinate billing and remittance. This can be done in several ways, depending on the vintage of the Entity’s dues with Organization A, below are suggested protocols.
	1. **Entity’s dues with Organization A are recently paid.** Organization B invoices the Entity for the *net discounted dues* *of both Organizations* (A dues \* 0.75 + B dues \* 0.75 – A dues). Organization A remits their discount to Organization B. (A dues \* 0.25)
	2. **Entity’s dues with Organization A are coming up due.** Organizations agree to invoice Entity individually at the discounted rate (A dues \* 0.75; B dues \* 0.75)

**Scenario B: Entity is not a member of either Organization, and wishes to join both.**

1. Entity contacts Organization A to express their interest in joining by:
	1. Completing Organization A’s Membership Application and the Membership Reciprocity Application.
2. Organization A notifies Organization B that Entity is requesting a 25% discount and shares the completed Membership Reciprocity Application.
3. Organization B reviews and signs the Membership Reciprocity Application and returns to Organization A.
4. Organization A instructs Entity to complete Organization B’s application.
5. Both Organizations agree to individually bill their discounted dues to Entity. Invoices sent to Entity should:
	1. Copy the Participating Organization
	2. Include as an attachment the Membership Reciprocity Application

**Scenario C: Entity is currently a member of both Organizations and seeks a discount. This can only be done when Entity’s dues (with one Organization) are coming up for renewal.**

1. Entity contacts Organization A by completing the Membership Reciprocity Application.
2. Organization A notifies Organization B that Entity is requesting a 25% discount and shares the completed Membership Reciprocity Application and paid invoice for Entity’s current dues
3. Organization B reviews the Membership Reciprocity Application and signs the Membership Reciprocity Application and returns to Organization A.

**APPENDIX B
MEMBERSHIP RECIPROCITY APPLICATION**

Entities seeking discounted dues from Participating Organizations must:

* Complete each Organization’s respective membership application (if new)
* Complete the Membership Reciprocity Agreement
* Submit to each Organization the Membership Reciprocity Agreement and proof of dues payment of one Participating Organization
* Agree to paying dues as invoiced by Participating Organizations

|  |  |  |  |
| --- | --- | --- | --- |
| Entity Name |  | Organization A | Organization B |
| Contact Name & Information |  | *(Insert Name)* | *(Insert Name)* |
| Are you a Current Member of either Organization? | [ ]  Yes [ ]  No | [ ]  Yes [ ]  No |
| 1. Determine the Applicable Annual Dues from each Organization.
 | $\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_ |
| 1. Apply a 25% discount to the Applicable Annual Dues from each Organization. (Multiply by 0.75)
 | $\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_ |
| 1. Add the Discounted Dues.
 | $\_\_\_\_\_\_\_ |
| 1. Dues History (Proof of paid dues must be provided to Participating Organizations)
 | [ ]  Paid [ ]  Not PaidDate: \_\_\_\_\_\_\_\_\_\_\_\_\_\_Amount: \_\_\_\_\_\_\_\_\_\_\_ | [ ]  Paid [ ]  Not PaidDate: \_\_\_\_\_\_\_\_\_\_\_\_\_\_Amount: \_\_\_\_\_\_\_\_\_\_\_ |
| 1. Proof of payment provided?
 | [ ]  Yes [ ]  No [ ]  N/A | [ ]  Yes [ ]  No [ ]  N/A |
| 1. Will the paid dues be applied to the net total due to the Entity?
 | [ ]  Yes [ ]  No [ ]  N/A | [ ]  Yes [ ]  No [ ]  N/A |
| 1. If marked YES in line 6, subtract paid dues in line 4 from line 3. If marked NO in line 6, then write in the Discounted Dues from line 3. **This is the Net Total Due to the Entity.**
 |  |
| **BILLING ADMIN TO COMPLETE:** Who will invoice the entity and remit the difference? | [ ]  Bill Entity $\_\_\_\_\_\_\_ [ ]  Remit $\_\_\_\_\_\_\_  | [ ]  Bill Entity $\_\_\_\_\_\_\_ [ ]  Remit $\_\_\_\_\_\_\_  |
| **REVIEWED & ACCEPTED BY** |  |  |
| **SIGNATURE** |  |  |
| **DATE** |  |  |