



Orion Membership Policy and Practices Guide

May 2023

Dear Member:

This document provides Orion's approach to membership development and becoming a member.

At Orion, we take great pride in cultivating an extraordinary base of Senior/Elder Care professionals and enriching the experience for all members. With this in mind, we intentionally apply a deliberate and thoughtful approach to growing our community of experts and those who are considering entering the field.

Our sole means for bringing on new members is through the personal recommendation and endorsement of current members. This unique sponsoring approach enables members to have access to the 'best and brightest' by building a group of only trusted, knowledgeable and caring resources.

To ensure that the Orion organization continues to be vibrant and credible as we grow, this Guide is provided to you with two goals in mind:

- 1. To communicate our philosophy and approach for building and expanding the Orion organization***
- 2. To highlight the actions that are involved to support these objectives.***

We still uphold our two non-negotiable requirements for how an individual becomes a member, i.e. to be sponsored by a current member and to attend one area chapter meeting. While the process for sponsoring is simple, we view the thinking behind identifying and selecting candidates for Orion membership as serious business.

Your role and responsibility as a sponsoring member is of utmost importance. The pages that follow affirm how your participation in the sponsoring process continues to set Orion apart from other Senior/Elder Care organizations – one that does not compromise on the values of caring, being passionate, giving-to-receive and encouraging collaboration between members to accomplish mutually beneficial objectives.

Orion's standing in the community as a respected organization rests in our hands. Only with your commitment and cooperation in following these guidelines can we continue the vision for Orion and help our members' businesses thrive.

As always, we look forward to your feedback. Please feel free to contact your sponsor for additional information or email us at Membership Committee at membership@orionrg.org.

Thank you for your participation in furthering Orion's goals and for your ongoing support.

To your continued success!

Sincerely,

***The Membership Committee
The Orion Resource Group***

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Introduction

The Orion Resource Group is dedicated to being known as a vibrant group of professionals in a wide range of specialties encompassing different aspects of Elder Care. Orion looks to its current members to identify and recommend appropriate candidates for membership.

From our beginnings in 2001, and still today, there are only two “non-negotiable” requirements for becoming an Orion member. These are:

- A qualified individual must first be sponsored by a current member.
- Then, s/he must attend at least one Orion area chapter meeting.

As such, we rely on our members to ensure that they recommend candidates with integrity, quality of character and value as a resource to all. At Orion, “quality of character” is defined by one’s caring and compassion towards others and passion for his/her own work.

In order to preserve Orion’s quality and its mission we ask members to be thoughtful and discerning as they consider sponsoring a potential member.

Why Sponsor?

Orion offers unparalleled value to its members. The benefits of sponsoring are substantial for each member and for Orion as a whole, in that sponsoring:

- Builds and enhances one’s own resource network
- Elevates one’s personal brand and professional profile through association with the quality resources s/he introduces to Orion
- Increases opportunities for members to collaborate and potentially to do more business
- Ensures the continued vitality and relevance of the organization, strengthening Orion’s brand and generating good will.

Members’ Responsibility to Sponsoring

Members have a vested interest in maintaining Orion’s high standards when they personally recommend and sponsor a new member.

With this in mind, we expect members to consider the following key points **BEFORE entering into a conversation** with an individual about Orion:

1. How Do I Know This Person?

- Have I worked with him/her in the past or already know him/her in a business context?

- Is this someone I've only recently become acquainted with, but have taken the time to determine that s/he will enhance Orion's current membership?
- If applicable, discuss this candidate with fellow Orion members who also know him/her.

2. What Qualities Does This Person Possess?

- Does s/he demonstrate competence and quality of character?
- Does s/he exhibit integrity and respect, displaying a positive, enthusiastic attitude and a caring manner?
- Do I believe s/he will bring value to Orion as a resource in his/her area of specialty, and will s/he be responsive to questions and concerns?

3. What Else Should I Ask Myself About This Person's Potential Fit Before Discussing Membership?

- Why am I thinking of introducing this person to Orion?
- Do I want the person as a co-member?
- What category is appropriate for the candidate: [Primary, Associate, Exploratory, Student](#)? (see Page 9 for definitions)
- Am I prepared, right now, to vouch for this person and start the process?

The Membership Process

Our approach to cultivating interest and attracting new members to Orion involves actions that both members and candidates take, supported by communications that come from Orion.

1. Member Accountability Actions

The process starts with members attending to four key accountability actions:

A. **Familiarize Candidates with Orion** Once a member decides to introduce a colleague to Orion, we highly recommend three focal points for learning about the organization:

- **Orion Home Page** (www.HelloOrion.org): This page (including subject tabs across the top) provides an excellent overview of Orion and its benefits to prospective members. Content posted by members curates a growing, robust library of specialty resource information available to future members.
- **About Orion Video (on the website home page)**: The video personally engages the prospective member with Orion's Founder & CEO, as well as its member community and goals.
- **One-To-One Conversations with Sponsor**: In speaking with the sponsoring member who shares his/her own experiences, candidates will gain an even deeper and broader understanding of Orion's culture, mission and commitments. Conversations with other members (whom the sponsor may suggest) might also be beneficial.

The sponsor should consider covering the following points with candidates as well:

- Advise about membership dues, fees and payment options (these are expressly stated on the [Join Us](#) page of the website) See [Addendum 1](#) regarding Orion's member categories and dues.

- Explain that once they join, the new member will benefit and be expected to attend the next available Member Orientation session.

B. **Sponsor's Decision:** Does the colleague express an interest in considering becoming a member? If so, the sponsor continues to section C.

(See Addendum 2 for a summary of Orion's policy regarding candidates and sponsor responsibility while an individual is in the process of considering membership).

C. **Using Orion's Website to Sponsor a Future Member:** Once a qualified candidate expresses an interest in considering membership, the process is as noted in Steps 1 through 5 below.

D. **Sponsor Communication with Candidates:** Sponsors are expected to stay in touch with the future member throughout the process to assess his/her interest in attending meetings and joining.

2. Steps in the Membership Process

Step 1: Sponsor Enters Candidate into Orion's Online System

- Click onto Orion's website www.HelloOrion.org and log in.
- On the toolbar, click on "Sponsor Candidate" and go to "Sponsor A Candidate" in the drop-down menu.
- Complete required fields: name, company, e-mail, phone, member category, specialty (for 'primary' members only).
- Agree to the guidelines set forth in this document.
- Write your personal endorsement and acknowledge applicable statements supporting your recommendation, referencing the candidate's expertise, characteristics that make him/her Orion-worthy and why s/he would be an asset to the group. **Please do not copy and paste from your candidate's bio.**
- Click "submit".

Step 2: System Adds Candidate to Mailing List and Generates Communications

Candidate is added to Orion's active email list and...

- Receives an automated, personalized letter that s/he has been sponsored by a member. (Sponsor receives a copy.)
- Is added to our invite list to receive the same announcements about upcoming area chapter meetings that all members receive.
- Will be asked to fill out an information form prior to attending their first Orion meeting.
- Has **four months** from sponsor date to attend at least one area chapter meeting and join Orion.

Note: Attending up to 3 meetings in this period is allowed, whether meetings are held virtually or in person.

- A candidate's first meeting is at no cost.
- A candidate may attend a second Orion meeting for a \$25.00 fee, which will be applied to membership if s/he joins within 15 days of attending the second meeting.
- A candidate may attend a third Orion meeting for \$25.00 (One \$25 fee will be credited to dues if the individual joins within 15 days of attending either the second or third meeting).
- If, after four months, the individual has not attended a meeting, the sponsoree will no longer be a candidate for membership and his/her information will be archived.

Step 3: Candidate Indicates Interest in Attending First Area Chapter Meeting

- Candidate advises Sponsor that s/he would like to come to an upcoming area chapter meeting. This can be a meeting in any geographic area, while it's suggested to first attend in the location of greatest interest to a candidate's business or exploration.
- Candidate registers for the meeting like all other attendees.
- Sponsor accompanies the individual to the meeting or, if the sponsor cannot attend, arranges for a proxy member.
- A sponsor may bring two to three candidates to any chapter meeting. The sponsor may bring additional individuals, subject to the Chapter Leader's (or the chapter representative's) approval, taking into account the meeting size and venue. All candidates must be sponsored in advance of the meeting date.

Note: In regard to virtual meetings: Candidates must participate by video (vs phone) for the entirety of their first meeting.

Step 4: Next Steps After Attending First Meeting

After a candidate attends his/her first area chapter meeting, s/he...

- Receives an automated letter, inviting him/her to join or attend a second, or possibly third, meeting (Sponsor receives a copy)
- Continues to receive chapter meeting announcements
- May attend a second or third meeting. (This may be with or without the sponsor). Meeting fees as in Step 2 will apply.

Note: If, after four months of being sponsored, the individual has not joined, the sponsoree will no longer be a candidate for membership and his/her information will be archived.

Step 5: Joining Orion

To join, the candidate:

- Logs onto the website using their email address as ID, selects JOIN NOW and completes the online membership/payment process.
- Receives a letter congratulating him/her as a new member (sponsor receives a copy). S/he will be prompted to update his/her account, complete the Orion Member Directory profile and read/comply with our membership guidelines.
- Attends the next Member Orientation session.

Member Categories, Dues Policy and Dues Administration

Important details regarding Orion's Member Categories, Dues Policy and Administration are on the following pages. We ask that you familiarize yourself with these guidelines to assist candidates you are recommending to Orion as well as for your own reference during your tenure as a member. Please refer to [Addendum 3](#) for more details.

For Questions or Additional Information

For help with Orion's membership process, using the website or our membership guidelines, please contact a membership committee representative by email at membership@orionrg.org.

Addendum 1

Orion Member Categories and Dues

Primary Member (Annual Dues: \$450*)

- Works in a field directly related to the elderly (in whole or part)
- Has expertise in elder care matters
- Shares expertise and gives time freely as a

resource Specialties include these areas plus others:

- Assisted Living/Independent Living and Nursing Homes
- Bereavement and Loss
- Creative Arts
- Elder Advocacy
- Elder Law
- Finance and Daily Money Management
- Geriatric Care Management
- Health and Wellness
- Home Health and Companion Care
- Insurance
- Mediation
- Moving and Transitions
- Trusts and Estates Law

Associate Member (Annual Dues: \$450*)

- Does not work directly in a field related to the elderly, but wants to actively support the Orion mission and its members

Exploratory Member (Annual Dues: \$450*)

- Does not currently work directly in a field related to the elderly, but is considering a career in such a field
- Has worked in another capacity and is considering transferring life and/or business skills to a role in the elder care field

Student Member (Annual Dues: \$120**)

- Wants to learn about fields involving the aging community to determine if this is a career path for him or her
- Is still in school or has finished school within the last two years (at any educational level: high school, college, graduate or postgraduate school)

** Plus a \$100 one-time lump sum Administrative/Initiation fee upon joining*

*** Plus a \$ 50 one-time lump sum Administrative/Initiation fee upon joining*

Addendum 2

Orion Future Member and Sponsor Responsibility Guidelines

Membership Philosophy: Orion provides a wealth of resources to its members with the goal of enhancing each member's service to his or her clients. Orion depends on its current members to identify and recommend appropriate candidates for membership. With sponsorship being Orion's essential means of acquiring new members, we rely on members to propose candidates who have expertise, integrity, passion and value as a resource to others.

Candidates as Future Members: Orion views member-recommended candidates as future members rather than casual visitors. This applies whether they are already working on behalf of elders or exploring this path as a new endeavor. We intend for guests to leave a meeting, or any conversation about Orion, feeling stimulated and motivated to continue their involvement and/or interest in the elder care field. Our hope is that they find Orion to be the perfect organization to support them in their work or exploration.

Attendance and Fees: To become a member, a candidate is required to attend one area chapter meeting in any of our locations (Long Island, New York City, Westchester or Northern New Jersey). While not required, it's suggested to first attend in the location of greatest interest to a candidate's business or exploration. If desired, the candidate may attend a second or third chapter meeting. The individual will have four months from the date s/he was sponsored in which to attend up to three meetings and join. There is no fee for the first meeting. There is a \$25 fee for the second and third meetings. (One \$25 fee will be credited to dues if the individual joins within 15 days of attending either the second or third meeting).

Invitees at Chapter Meetings: A member may bring up to three candidates to any chapter meeting. Additional candidates may attend with that member sponsor, subject to Chapter Leader (or Representative) approval, taking into account the meeting size and venue.

Sponsor Responsibilities: The sponsor is to ensure that the person being recommended is entered into Orion's online system **ahead of attending** the first chapter meeting. Sponsor accompanies his/her candidate to the meeting or, if the sponsor cannot attend, arranges for a proxy member.

While not required, it is highly recommended for the sponsor to attend the candidate's subsequent meetings.

In any case, the sponsor is expected to follow up after each meeting the candidate attends to assess his/her experience and interest in joining Orion.

Addendum 3

Orion Member Dues Policy and Administration

Member Affiliation: All Orion memberships attach to the **individual** (not the company in which the member works). In this way, membership remains intact and ongoing should the individual change companies during the annual membership cycle.

Individual Dues are \$450 per year.

Joint Dues: Annual dues for multiple members who work in one company, in one location:

- \$450/year: first member
- \$300/year: each additional member
- Students: \$120/year

Administration/Initiation Fees *for new members only* (one-time payment upon joining to cover administration and onboarding):

- \$100/member (Primary, Associate or Exploratory)
- \$50/member (Student)

Dues Payment Frequencies:

- Annual (see above amounts, individual or joint), one time per year on anniversary date
- Quarterly (Primary, Associate or Exploratory): \$117.50/qtr (individual); \$80.00/qtr (joint)
- Quarterly (Student): \$30/qtr

Payment Method: All dues and fees are payable by credit card.

Dues Administration Policy:

- Orion membership is an annual commitment. As such, dues are required for each 12-month period, regardless of the payment option selected.
- Each 12-month membership year begins on a member's annual anniversary date (e.g. rolling 12 months from the date an individual commenced membership).
- Membership and dues automatically renew on the annual anniversary date.
- Memberships are non-transferable.
- Membership Cancellations:
 1. Memberships may be canceled at any time, with 30 days written notice to Orion Administration.
 2. If membership is canceled during the annual membership year and the full dues amount for the membership year has not been paid, the balance of dues owed must be settled as of the membership cancellation date.
 3. If membership is canceled during the annual membership year and the full dues amount has been satisfied, there are no credits (i.e. refunds) provided for the remaining months in the current membership year.