



Membership • Business • Leads

## Membership Information

2018-2019

**For further information, please contact:**

OXA Executive Coordinator

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# OXA Membership Background

## **Who:** are the members of OXA?

OXA is an organization of business people whose sole purpose is to provide each other with business leads, referrals and direct business. Over the past decade, 60-80 businesses have been represented in OXA at any given time. Many OXA members have been part of the organization for more than 25 years, providing a strong foundation of members, with new members joining annually from a variety of different industries.

## **What:** is OXA?

OXA is the Ottawa Executives' Association. OXA is not a service club or charitable organization. This unique business organization was founded in Ottawa in 1936. The OXA is also a Founding Member of the International Executives' Association, which is comprised of 50-75 Executives Associations from around the world.

## **What are the benefits of membership?**

- As a member, you have the opportunity to associate with leading business firms and the people behind them. You gain a continuing acquaintance with these executives, their products and their services. Members discuss business formally throughout the year at regular weekly luncheon meetings. These business exchanges are confidential. Your membership in the Ottawa Executives' Association is purposeful in that you may gain strength over your competition. Fellow members often make pertinent business information known to you before others can hear about it. Also, your sales opportunities will expand to include others associated with member firms...employees, families and friends. Membership in OXA means business and current members will attest to this.
- As you widen your circle of acquaintances with these key executives, there are many opportunities to explain your firm's operation to them. Each and every member in the Association is a promoter of your company. You can also learn new management, production, distribution and sales techniques, which may be valuable to you and your firm.

## **When:**

### **Are there Obligations as a Member?**

Yes. OXA meets weekly and attendance is mandatory. (Executive members must attend 19 of the 25 meetings in each 6-month period, with Alternate members representing them up at 6 of those 25 meetings to make up attendance if needed).

## **Why:** is OXA Membership Referred to as "Exclusive"?

OXA's exclusivity lies in the fact that there is only one member firm for each business classification.

Each member firm is represented by its owner, CEO or key decision-maker, with direct influence in the firm's purchasing and selling powers. An approved associate may also represent the firm as an "Alternate" member, on a limited basis.

Members are not obliged to do business with each other but they are expected to seek pricing and tenders when products or services are needed. All things being equal, they are encouraged to do business with each other.

## **Where:** are meetings held?

Weekly meetings are held at the Rideau Tennis Club, typically in a luncheon format. "On-site" meetings usually take place at member locations, showcasing their products and services. Special events are held at various locations. The location depends on the format or type of event.

## **How:** to become A Member?

To join OXA, a firm must be sponsored by a current member and submit an application form along with a cheque for the initiation fee of \$500. Upon receipt of the application form and cheque, the potential member firm will then undergo a credit check and interview prior to being approved by the Board of Directors and the membership at large.

At the time of membership approval the member must provide the Executive Coordinator with valid credit card information to be kept on file. Should payment for amounts due, not be received within 60 days of an invoice being issued, payment for the full amount of the invoice will be processed to the credit card on file and a receipt will be issued to the member.

*The membership process takes approximately 1 month –  
Membership is not transferable*

# OXA Membership Criteria & Fees

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## Representation:

- An existing firm in the Association must sponsor a proposed member firm.
- The proposed firm must not conflict with any existing firm's classification.
- The proposed firm must have been in business for a minimum of 1 year.
- The proposed firm must not associate with nor be a member or shareholder of any firm, partnership, business organization or corporation with objects similar to the objects of the OXA as set forth in the Constitution.
- The representative must be an owner or key decision-maker, with the authority to bind the company and who has a direct influence on the firms purchasing and selling powers.
- The prospective member will be interviewed by a Membership Committee representative and recommendations for membership will be submitted to the Board of Directors. If the Board is in favour, their recommendation will be published to the membership at large. The membership at large will then has seven days to object after publication.
- Should a member object to an application, they must submit written notice of the objection to the President.
- The Applicant must consent to a credit check.
- An organizational chart of the company must be provided.
- Provide a list of associated companies.

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## Responsibility of member firm:

- There are 25 meetings in each 6-month period of the year. Principal members are expected to attend nineteen (19) of these meetings. Alternate members may count for up to 6 of the 25 meetings.
- Member firms must pay their invoices promptly. A valid credit card must be provided to the Executive Coordinator for use should alternate payment method not be received within 60 days of invoice being issued.
- To discover and pursue very practical ways in which the firm can assist other members.
- Member firms are encouraged to give other firms in the Association a fair chance to bid on projects.
- Recommend member firms for third party work.
- Recommend member firms to colleagues, employees, friends and families.

# OXA Membership Criteria & Fees

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## Membership activities:

- Regular weekly meetings each Thursday at lunchtime.
  - One on-site per month (minimum) which replaces the regular meeting. These meetings take place on either Wednesday evenings (5-8pm) or Thursday lunchtime.
  - Various social activities take place during the year including:
    - Annual General Meeting (June)
    - President's Summer Social (July)
    - Annual Golf Tournament (August)
    - Christmas Holiday Celebration (December)
    - Various Sporting Events (bowling night, hockey games, etc.)
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## Membership Fees:

- Initiation Fee \$500.00 (plus HST) - To be submitted with the application form.
- Annual fee (Executive Member) \$338.54 (plus HST) - Fiscal year May 1 – April 30. Fee is pro-rated at time of entry.
- Monthly meeting fee of \$ 133.10 (plus HST) per member. This is a fixed fee charged annually or quarterly whether the member is absent or attending meeting. Regular meeting fees are charged in advance of the beginning of each period. Additional costs incurred by the member will be invoiced on a quarterly basis.
- Annual Fee (Alternate Member) \$252.46 (plus HST). For approved Alternates, subject to OXA criteria & approval process.
- Additional attendees at weekly meetings (Alternate or guest) \$33.75 (plus HST).
- Social event costs are charged as published at the time of the event, less the regular meeting fee (if applicable).
- Once a member is approved, valid credit card information must be provided to the Executive Coordinator. The information will be kept on file and should payment for amounts due, not be received within 60 days of an invoice being issued, payment for the full amount of the invoice will be processed to the credit card on file and a receipt will be issued to the member.

*A member may be suspended from attending regular meetings and social functions if accounts are more than 90 days in arrears*

# OXA Membership Criteria & Fees

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## Advantages of being an OXA member:

- Our slogan “Remember a member”.
- As a member, you have the opportunity to share business information with other members.
- To become more familiar with happenings in the business community.
- To gain information and support with business problems.
- Acquire a dependable source of supply for products and services.
- As a member, you have an opportunity to learn about leading business firms and the people behind them.
- You gain a continuing acquaintance with top executives, their products and their services.
- Members discuss business formally throughout the year at regular weekly luncheon meetings.
- Your membership in the Ottawa Executives’ Association is purposeful in that you gain strength over your competition.
- Fellow members often make pertinent business information known to you before others can hear about it.
- Your sales opportunities will expand to include others associated with member firms... colleagues, employees, families and friends.
- As you widen your circle of acquaintances with these key executives, there are many opportunities to explain your firm’s operation to them.

**Ottawa Executives' Association Inc.**  
**Proposal for Membership**

**Principal**  
 **Alternate**

This proposal has a number of approval levels. A Sponsor is required and an Open Classification must be available. The proposed members should attend at least one luncheon as a guest of the Association prior to completion of the Application Form. The Application will then be reviewed by:

1. The Membership Committee
2. The Board of Directors
3. The Membership At Large

The proposed member and sponsor understand that submission of the application does not guarantee acceptance. The review period will take approximately 1 month.

**Please Print Clearly**

Firm Legal Name (This is the name that will be used when conducting credit check)	
Firm Operating Name	
Address (include City & Province)	
Postal Code	Telephone
Email	Fax
Website	Proposed Classification (should reflect business' core activity – 60%)

**Please attach a sheet of the proposed member's letterhead and/or one business card.**  
*(If the proposal is for an Alternate Member, please see designated area on page 2.)*

Principals of Firm	Title		
Principals of Firm	Title		
Executive OXA Representative	Title		
Phone #:	Email		
Executive OXA Representative is: <input type="checkbox"/> Owner <input type="checkbox"/> Partner <input type="checkbox"/> Corp Officer <input type="checkbox"/> Manager <input type="checkbox"/> Other (describe) _____			
Type of Business <input type="checkbox"/> Manufacturer <input type="checkbox"/> Retailer <input type="checkbox"/> Wholesaler <input type="checkbox"/> Distributor <input type="checkbox"/> Service <input type="checkbox"/> Other (describe) _____			
Business is: <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Head Office <input type="checkbox"/> Branch Office <input type="checkbox"/> Other (describe) _____			
Years in Business	No. of Full time employees	No. of other employees	No. based in Ottawa
Volume of Business annual sales volume is: <input type="checkbox"/> Under \$100,000 <input type="checkbox"/> \$100,000 - \$500,000 <input type="checkbox"/> \$500,000 - \$1 Million <input type="checkbox"/> \$1 Million - \$5 Million <input type="checkbox"/> Over \$5 Million			

## OXA Proposal for Membership (cont'd)

Briefly describe the prospective member firm's activities, including products and services and indicate which reflects the business' core activity (60%):

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**The undersigned fully understands:**

1. A **credit check** will be conducted and consents to same.
2. The **Membership Criteria**, especially with respect to attendance. Principal member agrees to attend a minimum of 19 meetings per 6 month period (average 25 meetings are held).
3. An **Organizational Chart** must accompany this application.
4. A list of any "**Affiliated Companies**" accompanies this application.
5. A cheque for the initiation fee of \$500 accompanies this application.
6. The proposed member and sponsor understand that submission of the application does not guarantee acceptance. The review period **may take approximately 1 month**. An interview will be arranged with the Membership Committee during this time.
7. As per the OXA By-laws, clause 2.3: "No member of the Corporation shall be associated with or be a member or shareholder of any firm, partnership, business organization, or corporation with objects similar to the objects of the Ottawa Executives' Association Inc., as set forth in the Chapter of the Corporation".
8. As a Principal of the applying member firm I acknowledge that the Executive and/or Alternate Representative has the authority to represent and act on behalf of our company. This includes the authority to bind our company for any amounts incurred with OXA Membership and its activities.

Please print Member Firm Representative Name	Please print Sponsor Name & Firm:
Member Firm Representative (Signature)	Sponsor (Signature)
Date	Date
<b>TO BE COMPLETED FOR ALTERNATE MEMBER PROPOSAL</b>	
Alternate Member Name:	
Proposed Alternate Member is: <input type="checkbox"/> Owner <input type="checkbox"/> Partner <input type="checkbox"/> Corp Officer <input type="checkbox"/> Manager <input type="checkbox"/> Other (describe)	
Executive OXA Member (Print name)	The Proposed Alternate Member understands Membership Criteria. (Signature of Executive OXA Member ):
<b>OFFICE USE ONLY</b>	
Date Proposal Submitted to Membership Director:	Interview Date:
Date of Board of Directors:  <input type="checkbox"/> Approval <input type="checkbox"/> Denial	Date of Publishing in Newsletter
	Date of Induction into Membership

## Membership Application Checklist

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*Please ensure that the following items have been reviewed and/or attached to your completed application form, when signing the application form.*

- ❑ **Enclosed with the application form** is a copy of our firm's Organizational Chart.
- ❑ **Enclosed with the application form** is a list of companies associated with the member firm and/or any of the principals of our firm.
- ❑ **Enclosed with the application form** is our cheque for \$500 payable to the Ottawa Executives' Association for the initiation fee. I understand that the cheque will be returned should our application for membership not be accepted.
- ❑ **I understand that submission of this application does not guarantee acceptance as a member of the Ottawa Executives' Association.** The review period may take approximately 1 month. An interview will be arranged with the Membership Committee during that time.
- ❑ **I have reviewed the membership criteria information** that accompanied this application, and understand that the Executive member must attend a minimum of 19 meetings per 6-month period (19 out of a possible 25 meetings).

Membership Applications cannot be considered  
*unless the above noted requirements have been met*