

THE EXCELLENCE DISTRICT — MEMBER EXPERTISE EXCHANGE STANDARD

Purpose

The Member Expertise Exchange gives members a structured way to share skills, mentorship, education, referrals, and professional services with other members who may need them. The goal is to turn community knowledge into trusted, useful connections without implying automatic endorsement or mixing regulated and unregulated services.

MEMBER PROFILE FIELDS

Each member or business listing should include:

- Member / business name
- Expertise category
- Skills / services offered
- Mentorship available: Yes / No
- Free / Paid / Both
- Credential, certification, or license when relevant
- Service area
- Remote availability
- Preferred audience
- Availability
- Contact route
- Portfolio / website
- Commercial affiliation disclosure
- Verification status
- Date last verified

EXPERTISE CATEGORIES

Examples:

- Skilled trades
- Business operations
- AI and automation
- Web / software development
- Graphic design / branding
- Marketing / content
- Financial education
- Insurance / licensed financial services
- Real estate services
- Legal-support services that do not constitute unauthorized practice of law
- Accounting / bookkeeping / tax
- Career coaching / recruiting
- Education / tutoring
- Family / parenting support
- Community service
- Wellness / fitness

- Photography / video
- Event services
- Transportation / logistics
- Construction / repair
- Mentorship / leadership
- Other verified expertise

LISTING RULES

1. A listing is not an endorsement by The Excellence District.
2. Members must describe credentials accurately and may not claim licensure, certification, professional authority, or business status they do not hold.
3. Regulated services must display applicable licensing information and jurisdiction where appropriate.
4. Paid services must disclose that the arrangement is commercial before work begins.
5. Members may not use the directory for spam, deceptive solicitation, guaranteed-results claims, pyramid-style recruiting, or coercive sales behavior.
6. Sensitive personal, financial, medical, legal, youth, or account information should not be posted publicly.
7. Complaints and corrections should be documented and reviewed.
8. Listings should be re-verified periodically.

MATCHING FLOW

Need posted or searched

- Relevant expertise identified
- Member profile reviewed
- Credential / fit check when necessary
- Intro or direct contact
- Scope conversation
- Written agreement selected
- Work begins
- Completion / feedback
- Optional referral or mentorship follow-up

PROJECT AGREEMENT GATE

A material paid project, recurring engagement, collaboration, referral-fee arrangement, intellectual-property exchange, or project involving confidential information should not move forward solely on an informal message thread.

Before work begins, the parties should select and complete the appropriate written agreement from the Contract Templates section. Typical documents include:

- Services Agreement
- Statement of Work / Project Scope
- Independent Contractor Agreement
- Mutual NDA / Confidentiality Agreement

- Collaboration / Memorandum of Understanding
- Mentorship Agreement
- Referral Agreement
- Change Order
- Project Acceptance / Closeout Record

At minimum, the agreement should identify:

- Parties and capacity
- Scope and deliverables
- Timeline
- Price / compensation
- Payment schedule
- Responsibilities of each party
- Confidentiality where relevant
- Intellectual-property ownership / license
- Change procedure
- Cancellation / termination
- Acceptance criteria
- Dispute process
- Governing law / venue when appropriate
- Signatures / dates

MENTORSHIP LANE

Mentorship may be:

- Volunteer
- Peer-to-peer
- Paid
- Group
- Short-term project mentorship
- Ongoing professional mentorship

A mentor profile should identify:

- Areas of experience
- What the mentor can and cannot advise on
- Expected time commitment
- Free or paid status
- Whether the mentor is licensed for any regulated subject
- Communication method
- Availability
- Whether confidentiality is expected

For minors or youth programming, additional safeguarding and parental/guardian consent requirements should apply.

REPUTATION & QUALITY SYSTEM

Recommended directory signals:

- Identity verified
- Credential verified where relevant
- Completed projects
- Mentorship contributions
- Member feedback
- Response rate
- Last active
- Dispute / correction status
- Community contribution badges

Feedback should describe the experience and not become a substitute for professional credentialing.

REFERRAL BOUNDARIES

Referral compensation can create legal, licensing, tax, insurance, real-estate, securities, legal-services, healthcare, or other regulatory issues depending on the industry and jurisdiction. Any referral-fee arrangement in a regulated field should be reviewed for the specific rules that govern that profession before payment is promised or made.

DATA & PRIVACY

Public profile data should be limited to information the member affirmatively chooses to publish. Sensitive identity records, account information, contracts containing confidential terms, and private disputes should remain in restricted administrative records.

ADMIN WORKFLOW

- ☐ Member submits profile
- ☐ Category assigned
- ☐ Credential check completed if relevant
- ☐ Commercial status disclosed
- ☐ Public fields reviewed
- ☐ Listing approved
- ☐ Last-verified date recorded
- ☐ Reverification date scheduled
- ☐ Complaints / corrections tracked
- ☐ Expired or inactive profiles archived

SITE EXPERIENCE

The live Member Expertise Exchange should support:

- Search by skill
- Filters by category, location, remote availability, free/paid, mentorship, and credential status
- Profile pages
- “Request Help” or “Request Introduction”

- “Offer Expertise”
- Contract-template prompt before project start
- Optional member ratings / references with moderation
- Clear disclosure that The Excellence District provides the directory and connection layer, not automatic professional endorsement

Canonical public domain: excellencedistrict.org

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