

	<b>Member Recruitment: Application Timeline and Deactivation Policy &amp; Procedures</b>	<b>SOP #</b>	1
		<b>Revision #</b>	N/A
		<b>Implementation Date</b>	10/21/2022
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<b>SOP Owner</b>	Membership Committee	<b>Approval of PEA Board</b>	

## 1. Purpose

To assure a fair, equitable and efficient recruitment process and to be respectful of the time of PEA members who voluntarily devote their efforts to prepare all the necessary documents to present to the Board of Directors for a final decision about member prospects.

## 2. Scope

The Membership Committee must be familiar with PEA's Member Recruitment processes and procedures. There are four common occasions when a PEA member prospect may be deactivated from the application process:

1. Inability of Membership Committee interviewers to set an interview with the prospective member
2. Non-receipt of required documents listed on Proposed Member Questionnaire
3. Lack of attendance to at least two Zoom meetings during the two-month recruitment process.
4. Elapse of the two-month application and recruitment process.

Any one of these occasions may commence deactivation.

## 3. Prerequisites / Materials

Proposed Member Information Form (receipt initiates two-month timeframe), PEA Proposed Member Questionnaire (for interview)

## 4. Responsibilities

The PEA Membership Committee, except for extenuating circumstances, is responsible to hold to the timeline below once the Executive Director submits the Proposed Member Information Form to the Membership Committee Chair who will designate Committee member(s) to complete specific activities, below.

## 5. Procedure

*Upon receipt of the information from the Executive Director, respond within 24 hours to Proposed Member Information Form*

- ✓ Assign Membership Committee Interviewer(s)
- ✓ Email Proposed Member and Sponsor as to who to expect to set up interview from the Membership Committee

*Within 30 days of receipt of the Proposed Member Information Form*

- ✓ Set Interview

- ✓ Post to all PEA members the prospective new member's name and classification in keeping with ARTICLE IV Sec. 2 of the PEA Bylaws.
- ✓ If any occasion listed above occurs, contact the Membership Committee Chair and Executive Director immediately

*Within 24 hours of notification that there are problems with application process*

- ✓ The Membership Committee Chair will notify Sponsor(s) by email and enlist their assistance to help resolve issues impeding the application process

*Within 45 days of receipt of the Proposed Member Information Form, Interviewers to*

- ✓ Write up a detailed report by filling in the PEA Proposed Member Questionnaire completely
- ✓ Submit PEA Proposed Member Questionnaire and required documents to Membership Committee Chair, email: [jb@jbbizwiz.com](mailto:jb@jbbizwiz.com) and Executive Director, email: [peaworks@assoc-office.com](mailto:peaworks@assoc-office.com).
- ✓ If directed by Membership Committee Chair, contact prospect to resolve any issue(s) that arise

*Within 50 days of receipt of the Proposed Member Information Form, Membership Chair or designee to*

- ✓ Follow up with sponsor(s) if Interviewer(s) experience any of the 4 possible deactivation occasions listed above
- ✓ All correspondence shall be cc'd to the Executive Director and PEA President

*Within 60 days of receipt of the Proposed Member Information Form, Membership Chair or designee to*

- ✓ Submit the accurate, completed application packet to the Board of Directors and Executive Director
- ✓ If incomplete, Proposed Member, Sponsor(s), Executive Director and PEA President shall be notified that the application is now "deactivated" and that the prospect will have to reapply at a later date, if interested.
- ✓ All fees collected will be part of doing business and will not be refunded to applicant.

## 6. Safety

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N/A

## 7. References

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Bylaws:
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**ARTICLE IV Sec. 1. Membership Application.** Applicants for membership shall submit an application to the Association on an approved form. The Board will review applications and decide whether to admit the applicant as a regular member, subject to the posting requirement described below. The Board may establish procedures for accepting and reviewing membership applications, and may in its discretion require recommendations from an existing member and/or from the membership committee before the Board acts on an application, provided that any such procedures shall be in writing and shall be applied in a nondiscriminatory manner to all applications.

## 8. Definitions

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