



PENINSULA EXECUTIVES ASSOCIATION (PEA) PROPOSED MEMBER QUESTIONNAIRE

PAGE 1 AND 2 ARE TO BE FILLED OUT BY PROPOSED MEMBER PRIOR TO INTERVIEW.

Thank you for your interest in the Peninsula Executives Association (PEA).
We look forward to learning more about you and your business.

Proposed Member – Business Name (dba): _____

Proposed Member – Name/Title: _____

Relationship to Business: *(Circle one.)* OWNER OFFICER EMPLOYEE

- Years of experience in this industry? _____

- Years of business experience? _____

- Business Philosophy: _____

Legal Owner of the Business: _____

Legal Business Name: _____

Street Address: _____

Mailing Address: _____

E-mail Address: _____ Web Site: _____

Business Phone: _____ Fax: _____ Cell: _____

Proposed By: _____ Phone: _____

How did the prospective member hear about PEA? _____

BUSINESS PROFILE

Purpose is to gather pertinent information to ensure the candidate meets the requirements for the classification.

1. Business Structure: *(Check one.)*

- ☐ CORPORATION
- ☐ PARTNERSHIP
- ☐ SOLE PROPRIETORSHIP
- ☐ FRANCHISE
- ☐ SUBSIDIARY/BRANCH (HQ: _____)
- ☐ OTHER _____

3. Primary geographic areas: _____
 Farthest geographic areas: _____
4. How long in business under current name? _____
5. Prior business experience: _____
 Prior business name(s) and dates: _____

6. How long at current street address? _____
 Prior address(es) and length of time in past five years. _____

7. Number of employees (W2): _____ Full-time: _____ Part-time: _____
 Number of subcontractors (1099): _____ Full-time: _____ Part-time: _____

REQUIREMENTS

SUBJECT	REQUIRED? YES/NO	IF REQUIRED, IS LICENSE OR POLICY CURRENT?	IS A COPY ATTACHED?	FOR MORE INFORMATION
1. Business License — General Information	Requirement varies by location. Verify.			http://www.business.gov/guides/licenses
2. State License(s) - Contractors - Professions	Requirement varies by business. Verify.			Contractors www.cslb.ca.gov Professions http://www.dca.ca.gov/cba/
3. Personal License - Professions	Requirement varies by type of work. Verify.			http://www.dca.ca.gov/cba/
4. Insurance - Workers' Comp.	Required if there are employees			www.dir.ca.gov/workers_comp.html (or may use a private insurance company)
5. Insurance - Liability	Recommended			http://www.superpages.com/supertips/business-liability-insurance.html

OTHER MARKETING	REQUIRED? YES/NO	DETAILS	COMMENTS
1. Internet - Web site	Recommended	Web address:	
2. Internet – Email	Recommended	Email address:	
3. Internet – Social Networking (Facebook, Twitter, etc.)	No: Required.		
4. Advertising – Printed Materials	No: Required.		
5. Advertising–Other	No: Required.		
6. Better Business Bureau	No: Required. Member? (Circle one.) YES NO Complaints? (Circle one.) YES NO	http://www.bbb.org/us/Find_Business_Reviews/ Rating: _____	
7. Diamond Certified	Not required.	http://www.diamondcertified.org/index.htm	
8. Other			
9. Other			
10. Other			

Thank you for your interest in joining PEA. A PEA Membership Committee volunteer will complete the remaining pages.

INTERVIEW QUESTIONNAIRE

It is important to obtain as much pertinent information as possible to adequately evaluate a proposed member. The following outline provides questions to ask when interviewing proposed PEA members. These questions should be considered as guidelines. Respect, common sense, and good business practices should dictate the direction and content of the interview.

CLASSIFICATION

Purpose is to make sure the business fits the classification and that the classification is appropriate for the prospective member. This is also an opportunity to address the 60% rule and any conflicts that could arise with current membership. Committee should approve the classification fits the business, thereafter.

The classification being applied for is _____

This classification must represent at least 60% of the prospective member's business activity. If approved for membership, the prospective member may market only within the approved classification at PEA meetings. An associate member or other staff who attend PEA meetings or events are also restricted to the approved classification.

- Does the prospective member understand the 60% rule? (Circle one.) YES NO
- Does the prospective member agree to follow 60% rule? (Circle one.) YES NO

8. Are there any potential conflicts between this business and a current PEA member?

(Circle one.) YES NO If yes, who? _____

Has the prospective member talked with the current member yet? (Circle one.) YES NO

Results: _____

Are there any questions about this classification that need follow-up?

MARKETING

Purpose is to gather information regarding the ideal clientele and lead generation.

1. Current typical customers: _____

Future targeted customers (if different): _____

2. Current marketing strategies: _____

How would PEA enhance marketing strategies? _____

3. Current networking strategies: _____

How would PEA enhance networking strategies? _____

4. Current advertising strategy: _____

Future advertising strategy (if different): _____

PEA NETWORKING

Purpose is to guide prospective member through the lead sharing and networking within the group. This is also the opportunity to discover to what extent a prospective member is involved with competing leads groups.

1. How does the prospective member think PEA and its members can be helpful? _____

2. How could the prospective member help PEA and its members? _____

3. Does the prospective member currently do business with PEA members?
(Circle one.) YES NO With whom, and for how long? _____

4. Is it likely the prospective member will provide at least two direct leads per month?
(Circle one.) YES NO
Is it likely the prospective member provide at least two referral leads per month?
(Circle one.) YES NO
5. To what other leads/ business development groups, or professional or industry groups, does the prospective member belong? _____

PEA EXPECTATIONS

- Committed to weekly breakfast meetings and Open Houses? (Circle one.) YES NO
- Will assume PEA committee assignments? (Circle one.) YES NO

Since Attendance is the first Committee you will be assigned to, what are skills and interests should PEA know about to make this experience more engaging/valuable to you?

PEA encourages members to appoint someone else in the company to attend activities if member can't.

11. Name of associate member: _____

- Relationship to Business: *(Circle one.)* OWNER OFFICER EMPLOYEE

- Years of experience in this industry? _____

- Committed to weekly breakfast meetings and Open Houses? *(Circle one.)* YES NO

- Will assume PEA committee assignments? *(Circle one.)* YES NO

- Years of business experience? _____

12. Who will be responsible for PEA dues (if other than the proposed business)?

13. Is the prospective member aware of the initiation fee of \$250 and (pro-rated) quarterly dues of \$355, all due at the first meeting after Board approval?

(Circle one.) YES NO

14. Is the prospective member aware that quarterly dues must be paid within 30 days of being billed, and invoices are issued electronically? *(Circle one.)* YES NO

For Mentorship Committee (If prospect has any thought about these):

What are needs in your business where you might want some specialized expertise or perspective?

Who have you worked with before from PEA?

Who in PEA would you like to work with or know better?

15. Are there any questions about PEA membership that need follow-up? _____

RECOMMENDATION

Purpose is to make sure all items have been verified and provide a recommendation to the board whether to propose the member or not.

Please check the items you have completed:

- _____ **Verified all the information provided on this Interview Form.**
- _____ Visited the proposed member's place of business.
- _____ Visited the proposed member's business web site.
- _____ Verified that all required personal and business licenses/permits and required Workers' Comp. and liability insurance policies are current.
- _____ Checked to see if this business has a Better Business Bureau rating.

(Select one below.)

_____ **I recommend** this proposed member with no reservations:

_____ **I do not recommend** this proposed member because: _____

PEA Interviewer: _____ Date: _____

Print Name/Business: _____

(Optional)


2nd PEA Interviewer: _____ Date: _____

Print Name/Business: _____

Note: If two interviewers do not agree on a recommendation, each interviewer should complete this page separately.

Please attach additional comments, copies of licenses and insurance coverage, samples of business cards, marketing materials, business literature, advertisements, etc. Scan/email or fax this completed form plus all attachments to the Executive Director and the Chair of the Membership Committee (Email membership@executives.org. Toll Free Fax 877-426-8501).

NEXT STEPS

	RESPONSIBLE	TASK
<input type="checkbox"/>	Interviewers	Notify Membership Committee Chair and Executive Director that interview is completed and recommendation status via an email to membership@executives.org .
<input type="checkbox"/>	PEA Executive Director	Schedule Board meeting agenda item to discuss candidate's interview and status.
<input type="checkbox"/>	Membership Chair & Interviewers	Attend Board meeting and provide input on candidate.
<input type="checkbox"/>	Board	Vote on candidate.
<input type="checkbox"/>	Interviewers	Return completed original interview form to Executive Director.
<input type="checkbox"/>	Executive Director	Notify Membership Committee Chair of candidate status and Board vote.
<input type="checkbox"/>	Membership Chair	Notify full Membership Committee of outcome of Board vote via an email to membership@executives.org .
<input type="checkbox"/>	Membership Chair	Notify candidate sponsor of status and outcome of Board vote.
<input type="checkbox"/>	Candidate Sponsor	Advise candidate of Board vote and invite to attend the next breakfast meeting, as appropriate.
<input type="checkbox"/>	Executive Director	Prepare new member welcome kit and first invoice for new member.
<input type="checkbox"/>	Executive Director	Track receipt of new member's dues payment. Add to website, directory, and other email lists, set up recurring invoices in QBO, and more administrative tasks, etc.