

Existing Agreement

Proposed Agreement

Membership Agreement 09.10.09

Our primary membership goal is to have Heartwood residents be active, enthusiastic, responsible, and caring members of the community. To that end, all adult residents and owners are required to become members. We define a member as someone who is an adult resident and/or owner who has completed the Prospective Member Checklist. The purpose of the Prospective Member Checklist is to make sure that people wanting to become members are well informed, have fully considered life in Heartwood Cohousing, and are committed to actively participating in community life. We feel that once people have a full understanding of our community, they are in the best position to decide if we are right for them and they are right for us.

Membership Agreement (v. 2015.04)

Our primary membership goal is to have Heartwood residents be active, enthusiastic, responsible, and caring members of the community. To that end, all adult residents and owners are required to become members. We define a member as someone who is an adult resident and/or owner who has completed the [Prospective Member Checklist](#) (PMC).

The purpose of the PMC is to assist individuals who are considering membership to gain a well informed understanding of life in Heartwood Cohousing, to understand our shared expectations, and to support a full commitment to actively participating in all realms of community life. We feel that such a well informed understanding of our community is the necessary and appropriate foundation upon which to decide if Heartwood is right for you, and if you are right for Heartwood.

The "status" of Membership implies *both* completion of the PMC *and* actual residency at Heartwood (or home or lot ownership); someone that has completed the PMC but has not moved in, has one year to do so; those who do not move in within one year of completing their PMC, must do so again.

Those *exploring* life at Heartwood through a rental of not more than 90 days, may do so without being a member, *however*, anyone in the status of exploratory rental *must* immediately begin the Prospective Member process and PMC upon the first intention, anticipation, or reasonable likelihood of staying longer than 90 days.

For those *intending* to be longer term resident/members, the status of exploratory rental is not intended to be a side-door around the timely completion of the PMC; exploratory rentals are for a) seasonal guests, and b) those who truly do not know what their intention or status will be, 90 days hence.

The Membership Team may decide to waive, modify or extend

Membership Expectations

The following residents are exempted from the membership requirement.

- Guest: Someone who intends to live here for less than 90 days. (Note: A Renter is someone who intends to live here for more than 90 days, regardless of whether or not any money is paid. Renters are required to become members.)
- Caregiver: Someone whose primary reason for living here is to care for the health of an ailing member or provide assisted living care for a member (including a live-in nanny providing childcare).
- Care Recipient: Someone who is ailing and whose primary reason for living here is to be cared for by a member.
- Children: Someone less than 18 years old. Children of members are eligible to become members when they reach 18, although they may choose not to become members until they are 24 years old. Upon reaching 24, however, they are required to become members.

certain requirements due to extenuating circumstances, so long as you have completed the majority of the process, and are able to give full and careful consideration to becoming a member.

Membership Expectations

To the degree that each of us is individually capable, members understand and agree to actively support Heartwood's [Vision, Values, and Interpersonal Agreements](#) (collectively: Values), and to pursue the realization of these shared Values in the areas of

- 1) Ongoing personal growth
- 2) Developing and maintaining positive interpersonal relationships; and
- 3) Actively participating in the ongoing work of running a small village of 24 homes, and the stewarding of our many resources, be they natural, community-built, and/or community fabric.

Exemptions to Standard Membership Requirements

- Guest: Someone who intends to live here for less than 90 days. (Note: A renter is someone who intends to live here for more than 90 days, regardless of whether or not any money is paid. Renters are required to become members.)
- Caregiver: Someone whose primary reason for living here is to care for the health of an ailing member or provide assisted living care for a member (including a live-in nanny providing childcare).
- Care Recipient: Someone who is ailing and whose primary reason for living here is to be cared for by a member.
- Children: Someone less than 18 years old. Children of members are eligible to become members when they reach 18, although they may choose not to become members until they are 24 years old. Upon reaching 24, however, they are required to become members.

Heartwood Cohousing supports and welcomes Renters, Guests, Caregivers, Care Recipients and Children and we invite them to fully participate in community life. Members are expected to help educate their non-member Guests, Caregivers, Care Recipients and Children about Heartwood. Ultimately, members are responsible for their non-member Guests, Caregivers, Care Recipients, and Children.

Guests, Caregivers, and Care Recipients are not required to become members, but we welcome and even encourage them to do so. Anyone who becomes a member has the full rights and responsibilities of membership. Guests, Caregivers, and Care Recipients who do not choose to become members, do not have member rights and responsibilities.

Prospective Owners

It is recommended that a prospective owner complete as much of the [Prospective Member Checklist](#) as possible before entering a purchase contract, but in any case they must complete the entire Prospective Member Checklist before the purchase contract inspection objection deadline. If the prospective owner has not completed the Prospective Member Checklist before entering a purchase contract, the following language is to be included in the purchase contract:

“Buyer’s satisfaction with Inspection includes the property and Heartwood Cohousing. As part of their inspection, Buyer agrees to fully complete the Heartwood Cohousing Prospective Member Checklist before the Inspection Objection Deadline. If Buyer has not fully completed this Checklist, the Inspection Deadline may be extended by agreement of both parties, or the Buyer will be considered to have canceled this Contract due to Inspection Objections.”

Heartwood Cohousing supports and welcomes renters, guests, caregivers, care recipients and children and we invite them to fully participate in community life. Members are expected to help educate their non-member guests, caregivers, care recipients and children about Heartwood. Ultimately, members are responsible for their non-member guests, caregivers, care recipients, and children.

Guests, caregivers, and care recipients are not required to become members, but we welcome and even encourage them to do so. Anyone who becomes a member has the full rights and responsibilities of membership. Guests, caregivers, and care recipients who do not choose to become members, do not have member rights and responsibilities.

Prospective Owners

It is recommended that a prospective owner complete as much of the PMC as possible before entering a purchase contract; in any event, prospective owners must complete the entire PMC **before the purchase contract inspection objection deadline**.

If the prospective owner has not completed the PMC before entering a purchase contract, the following **language is to be included in the purchase contract**:

"Buyer's satisfaction with Inspection includes the property, and Heartwood Cohousing, and the latter's Prospective Member processes. As part of their inspection, Buyer agrees to fully complete the Heartwood Cohousing Prospective Member Checklist (PMC) before the Inspection Objection Deadline. If Buyer has not fully completed the PMC, the Inspection Deadline may be extended by agreement of both parties, OR the Buyer will be considered to have canceled this Contract due to Inspection Objections."

Prospective Renters

Prospective renters must complete the [Prospective Member Checklist](#) before moving in or before entering a long term (more than 90 days) lease agreement, whichever comes first.

Former Members

A person is no longer a member when they are no longer an owner or resident at Heartwood. A former member has none of the rights or privileges of membership. A former member returning to Heartwood within 2 years of departing becomes a member again once they own or rent again without going through any membership process. A former member returning to Heartwood after 2 years of departing becomes a member again once they own or rent again and complete the [Returning Member Checklist](#).

Miscellaneous

Owners are free to sell or rent to whomever they wish so long as the new home buyers or renters are intent upon being active members of the community. Throughout the process of finding new home buyers or renters, owners are to keep the community well informed about various prospects and where things are at in terms of decisions being made, contracts being signed, etc.

In order to encourage a high level of overall community participation and vitality, homeowners are to make a good faith effort to ensure that their homes are occupied (by owners, renters, guests, etc) at least about three-fourths of the days per year.

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Prospective renters must complete the PMC before moving in; prospective renters may not enter a long term (more than 90 days) lease agreement before completing the PMC.

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Miscellaneous

Owners are free to sell or rent to whomever they wish so long as the new home buyers or renters are intent upon being active members of the community. Throughout the process of finding new home buyers or renters, current owners are to keep the community well informed about the various prospects, how the specifics of our prospective new member processes are moving forward, and the decision points being reached (e.g. contracts being signed, etc.).

In order to encourage a high level of overall community participation and vitality, homeowners are to make a good faith effort to ensure that their homes are occupied (by owners, renters, guests, etc) at least about three-fourths of the days per year.