

# Prospective Member Checklist



04/11/15

Name: \_\_\_\_\_

## Introduction

Our membership process is designed to support prospective new members in gaining substantial understanding of Heartwood's [Vision, Values, Interpersonal Agreements](#), our operating structures and processes, and what you can anticipate day-to-day life within the Community to be like.

Upon completing this Prospective Member Checklist (PMC), it is anticipated that YOU will be able to make a much more informed choice as to whether or not Heartwood is the right place to live, for you (and your family, if also present). At that point, the choice is YOURS, that is, you *self select*: Yes, I/we want to live here and become active members of the Community; or No, now I think that maybe it's not quite right for me.

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.

To become a Heartwood member, please print out this PMC and fill it in as you complete the various requirements. One PMC is required per adult in the household. You must complete the PMC in good faith and return it to the Membership Team. Once the Membership Team has reviewed your completed PMC and found all elements to be complete, and you are comfortable with joining the Community and you choose at that time to do so, you will become a member of the Heartwood Community upon your move-in.

The Membership Team may decide to waive, modify or extend 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.

\*\*\* Please note that the numbering of action steps below is NOT intended to suggest a sequential order of completion; please explore and complete these requirements in the order that your interests and time allow.

## Study & Consideration

1) Read either or both of the following books (or specific chapters, as may be suggested); check off when read (a limited number of these books are available to borrow):

*COHOUSING: A Contemporary Approach to Housing Ourselves.* Kathryn McCamant and Charles Durrett.

\_\_\_\_\_ *Reinventing Community: Stories from the Walkways of Cohousing.* by David Wann \_\_\_\_\_

2) Complete the [Membership Questionnaire](#) and forward it to the Membership Team or the specific Membership contact person you will have been working with, before meeting with them.

3) Read all of the Heartwood Cohousing [Agreements](#) (also at this link are Guidelines and Resources; these are not required reading but remain valuable resources that you should be aware of). Please check off once completed:

\_\_\_\_\_

4) Meet with the Membership Team to discuss membership and the Membership Questionnaire. Please indicate date of meeting: \_\_\_\_\_

## Participation

1) In order to help you make connections within the community, please provide a bio of your household (including animals) to the Membership Team, who will then post to the Community email chat. The Membership Team will also include your email/s in that post, so that Community members will be able to communicate directly with you, and vice-versa.

Please check off once completed: \_\_\_\_\_

2) Attend one Community Meeting and two other functions (any of our organized events including Common Meals, Potlucks, Team Meetings, Community Meetings, Meetings of the Heart, Wisdom Circle, Parties, Work Parties, etc.). Two of the functions attended must be at least two weeks apart. Please list type and date of functions:

Community Meeting Date: \_\_\_\_\_

Function #1: \_\_\_\_\_ Date: \_\_\_\_\_

Function #2: \_\_\_\_\_ Date: \_\_\_\_\_

3) Have conversations with at least 8 current members; conversation topics could include:

- Decision Making and Consensus process
- Participation in Community (common meals, social & work participation, as distinct and important elements of full participation)
- Children and Parenting in Community
- Developing individual and collective Passions within Community
- Pets in Community
- Conflict Resolution
- and other topics as may be of deep interest to *you*

Please list names of members with whom you have had conversations, and if the topic was one of the topic areas above, please identify the topic/s:

Member #1 \_\_\_\_\_

Member #2 \_\_\_\_\_

Member #3 \_\_\_\_\_

Member #4 \_\_\_\_\_

Member #5 \_\_\_\_\_

Member #6 \_\_\_\_\_

Member #7 \_\_\_\_\_

Member #8 \_\_\_\_\_

4) Once sufficient progress has been made on your new membership journey, and there is an anticipated path toward move-in (for instance, you have identified a home or lot and are in conversation with the owner regarding a lease or purchase agreement), the Membership Team will provide you a link to subscribe to the Heartwood email chat. Please subscribe and begin to familiarize yourself with the pulse of the Community.

Please also remain aware – as is true of all email platforms – that personalities and communication styles vary, and that some matters on the chat may have long contextual threads going back months, and occasionally years. For instance, managing our water wells. When you find yourself unsure as to what is being discussed on the chat – and this may happen many times over your first several months – please check in with one or more community members.

Please check off once you have joined the chat: \_\_\_\_\_

### **Declaration of Agreement & Commitment**

Please read the following declarations and sign below.

Through the many conversations, common meals, meetings, and readings that I have shared in during my exploration of Heartwood, I can and do say today:

Heartwood looks and feels like the place I want to live, I am ready to join the Community; I understand and endorse Heartwood's Vision, Values, Interpersonal and other Agreements;

I understand that the tremendous benefits of living in Community come with significant responsibilities that each of us must uphold;

To the the degree that each of us is individually capable, I understand these responsibilities to be 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;

I also understand that there is a Community-level appreciation and acceptance that each of us will have periods of time in which we are simply unable to "show up" as fully as we would otherwise desire; that it is OK for each of us to be less present in those times; and that my friends and neighbors in the Community will look forward with me to the time I will return with full presence;

Heartwood looks and feels like the place I want to live; I am ready to join the Community.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Congratulations – And Welcome to Heartwood!! \*\*\*

## Membership Team Review

Within one week of receiving your completed PMC, the Membership Team will review all requirements for completion and inform the prospective member of the outcome. Please note any requirements waived or modified or other comments.

Completing the PMC and living in or owning a home or lot at Heartwood are both required for membership. Please check off when each one has been completed.

\_\_\_\_\_ Has completed the PMC; Date: \_\_\_\_\_

\_\_\_\_\_ Lives in or owns a home or lot at Heartwood; Date: \_\_\_\_\_

(If the prospective member does not yet own or live at Heartwood, this otherwise completed checklist will be held on file until that happens, at which time the prospective member will become a member. The checklist will be held on file for up to one year. After that time, the prospective member must complete the checklist again before becoming eligible for membership.)

Membership Team Member's Name: \_\_\_\_\_ Date: \_\_\_\_\_