

PORTLAND EXECUTIVES ASSOCIATION
NEW MEMBER SELECTION PROCESS
(July 2021)

1. Proposal

Members propose a candidate to Bob BEFORE an invitation to join occurs.

2. Pre-Screening Interview

Bob conducts a pre-screening interview with the candidate.

3. Pre-Screening Research

Assuming Bob feels they are a good candidate, a group of leaders conduct independent pre-screening research using the checklist to determine if they agree this firm would be a good candidate. Bob collects the checklists and opinions and gains consensus from the group. The emphasis here is on the firm, and to identify any potential conflicts of interest early in the process.

4. Invitation

If the group of leaders agrees this would be a good candidate for membership, Bob notifies the sponsor to go ahead and extend an invitation for the prospect to submit an application. The sponsor would also explain the application process.

5. Division Vetting

If an application is received, the first step is division vetting. The Division Coordinator notifies Bob within 5 days after input from the Division.

6. On-Site Interview

If there are no concerns and the application is approved by the Division, Bob and 1-2 other leaders will go visit the applicant at their place of business to interview the member to explain all aspects of membership to assure the prospective member understands and would be a good fit. Bob would then report the findings from this interview to the Board.

7. Board Vote

The Board would then be able to vote using all the above information.

Group of leaders includes:

Membership Committee Chair

Respective Division Coordinator

Board Chair

Any one of the 5 members of the Education Committee (one must be part of onsite interview)

**PORTLAND EXECUTIVES ASSOCIATION
NEW PROSPECT CHECKLIST
(July 2021)**

Name: _____

Prospective member firm (company name): _____

Number of years in business: _____

Prospective member's title/position in company: _____

Number of years with the firm: _____

Sponsor's relationship with firm: _____

Company details (address, website address, number of employees, etc.):

Any potential conflicts with existing members (list any): _____

If overlap, is there potential for synergies: _____

If relevant, how does their physical office presence look: _____

Is the location convenient to other members: _____

How does their web site look (professional, etc.): _____

How are their online reviews (positive, negative comments, etc.): _____

Any known business references: _____

Do they do work with any existing members: _____

Do they understand the purpose of the association: _____