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## ACTIVE MEMBERSHIP APPLICATION

### 1. NEW APPLICANTS:

- A. QUALIFICATIONS:** Applicants for Active Membership shall meet the qualifications for membership set forth in Article I, Section 1.1 of the Bylaws. Candidates may be either individuals or business firms.
- B. ADDITIONAL QUALIFICATIONS:** These additional qualifications shall apply to applicants submitted on or after April 1, 2010. Individuals or firms who are Active Members of WI prior to April 1, 2010 shall be exempt from these additional qualifications, but shall abide by the WI policies, rules, regulations, and Bylaws on an ongoing basis.
- i. **References.** The applicant shall provide a minimum of three (3) letters of references from contractors, design professionals, and/or owners of projects for which they have fabricated and/or installed millwork products meeting WI standards within the immediately preceding 24 months. Said references shall include contact information sufficient for the Membership Committee to verify said references.
  - ii. **Experience.** The applicant shall have no less than three (3) years direct full-time experience, or its equivalent, in commercial millwork manufacturing and/or installation, within the immediately preceding five (5) years. Said statement of experience shall include contact information sufficient for the Membership Committee to verify said experience. If the applicant is a firm, the "experience" requirement shall mean being in full-time commercial business.
  - iii. **Creditworthiness.** The applicant shall submit a credit report issued by a national credit reporting firm within the past six (6) months. Said credit report shall reflect an "Excellent" to "Good" credit history. For individuals, a "Good" credit score is 600 or higher.
  - iv. **Licensure.** The applicant shall submit copies of all State Contractors Licenses currently or previously held by the applicant, and completely disclose all administrative and judicial actions taken concerning said licenses during the immediately preceding 36 months. Said licensure status and history shall be satisfactory at the discretion of the Membership Committee.
  - v. **Knowledge.** Individual applicants shall take an open book examination on knowledge of the industry, shop drawings, WI policies and programs, and "The WI Approach" document. The applicant shall correctly answer no less than 75% of the examination questions. Firm applicants shall designate an individual who shall serve as its "Designated Representative" (contact person), and shall take/pass the examination on behalf of the firm. Exams may be requested by sending an email to: info@woodinst.com.

### C. APPLICATION PROCEDURES:

- i. **Application Form.** The applicants shall use the Membership Committee's written application form.
- ii. **Fees.** The applicant shall pay an application fee in the amount of \$525.00 at the time of application submittal. Additionally, the applicant shall pay an entire calendar year of dues, the excess portion of which will be offset by a credit towards the following year's dues on a quarterly basis. For example, if an applicant submits an application on June 30<sup>th</sup>, the applicant shall receive a credit for six months of dues the following year. Dues shall be refunded to the applicant within 90 days of final rejection of an application. Application Fees are not refundable.
  - a) Dues are based on an entities gross sales in our service areas of Arizona, California, Hawaii , Nevada, and Oregon as follows: sales less than \$750,000 = \$500; between \$750,001 - 3,000,000 = \$900; and over \$3,000,000 = \$1,200.
- iii. **Examination.** Examination shall be taken by the applicant without assistance from third parties, and submitted with the application. Any application received without the examination will be held until such is received.

### D. BENEFITS:

- i. Use of Institute's logo with "Active" tag.
- ii Access to Group Insurance Programs.
- iii Access to Vigilant HR Services.
- iv Free *Architectural Woodwork Standards*.
- v *Details* (member newsletter), *Archetype* (design professional journal), and the Membership Roster.
- vi Member listing on the Institute's website and the annual Membership Roster (subject to print cutoff date).
- vii Discounts on: Certification/Inspection Services, Publications, Educational Programs, etc.
- viii Existing and Future Member Services and/or Programs.

## 2. MEMBERSHIP APPLICATION AND REVIEW PROCEDURES

- A. MEMBERSHIP APPLICATION AND CRITERIA.** Active Member applicants shall provide the following:
- Completed, executed application with all attachments (letters of recommendation, proof of experience, credit rating, contractor license statue, completed examination).
  - Application Fee.
  - First Year's Dues.
- B. MEMBERSHIP COMMITTEE REVIEW.** The WI Membership Committee shall review each application, and shall determine the suitability of the applicant for membership in the association based upon criteria set forth in WI policy, including the Bylaws, Code of Ethics, other policies, applicable laws and regulations. The Membership Committee will not consider information or matters not reasonably related to the above-referenced criteria.
- C. APPROVAL OR DENIAL OF MEMBERSHIP APPLICATION.** Based upon its review, the Membership Committee shall approve or deny each complete membership application. If the application is denied, the decision shall be made known to the applicant, and the applicant shall be informed of his/her/its right to a hearing concerning the denial of membership application. A notice of request for a hearing shall be included with the notice of decision. An applicant may request a hearing concerning a denied membership application within 45 days of the date the notice of denial was mailed to the applicant. If no hearing is requested within 45 days, the denial is final, and no longer subject to a hearing or appeal.
- D. PROBATIONARY STATUS OF NEW ACTIVE MEMBERS.** New applicants shall be admitted on a probationary basis for their first year of membership. During this probationary period, the new member shall be entitled to a member discount on certification/inspection fees of 15%. During said probationary period, the applicant shall permit WI to review the applicant's work in process (including actual physical work, shop drawings, and full contact information), on a random basis by WI, or based upon a complaint by any person with a bona fide interest in the project (including contractors, design professionals, inspectors and owners), in order to evaluate the work of the applicant to ensure that it is compliant with standards adopted by WI, including the "*Architectural Woodwork Standards*" and "*The WI Approach*." Said evaluations shall be conducted in a discrete and confidential manner by qualified evaluators/inspectors authorized by WI, and who have no business or personal relationship with the applicant other than through membership in WI.

## 3. HEARING PROCEDURES

- A. DUE PROCESS.** In the event that an applicant requests a hearing concerning a denied membership application, "due process requirements" are applicable. To satisfy due process requirements there must be: (a) Reasonable notice of the reasons for denial of the application, (b) notice of the time and place for the hearing, (c) the right of confrontation and cross examination of witnesses, and (d) an opportunity to refute all claims concerning lack of eligibility for membership. The applicant shall not be entitled to be represented by legal counsel in the hearing portion of this process.
- B. REJECTION OF MEMBERSHIP APPLICATION.** Upon hearing and consideration of the facts and evidence presented, the Membership Committee shall render a decision. Every decision, whether for approval or denial of membership, shall be in writing, and denials shall specify the reasons for the denial. Notice of the decision shall be sent by return receipt requested mail to the applicant. The notice of decision must be sent by return receipt requested mail, and must be accompanied by a form to request an appeal hearing before the WI Board of Directors, and must specifically state that any appeal must be filed with a statement of particulars with the Executive of WI no later than sixty (60) days after the mailing of the decision.

## 4. REVIEW OF DECISION.

- A. APPEAL OF REJECTED MEMBERSHIP APPLICATION.** The decision of the Membership Committee, following the hearing, shall be subject to review/appeal by the WI Board of Directors, subject to its own rules and procedures. Any appeal must be filed with a statement of particulars with the Executive of WI, no later that sixty (60) days after the mailing of the decision, or it is forever waived.
- B. APPEAL PROCEDURES.** In the event that of appeal, "due process requirements" are applicable. To satisfy due process requirements there must be: (a) reasonable notice of the reasons for denial of the application, (b) notice of the time and place for the hearing, (c) the right of confrontation and cross examination of witnesses, if any, and (d) an opportunity to refute all claims concerning lack of eligibility for membership. The applicant shall be entitled to be represented by legal counsel in the appeal portion of this process. The decision of the WI Board of Directors shall be final.

## 5. MAINTENANCE OF ACTIVE MEMBERSHIP.

- A. ONGOING COMPLIANCE** with WI policies, rules, regulations and Bylaws. Members are subject to WI policies, rules, regulations, and Bylaws on an ongoing basis, and shall be subject to discipline, suspension, or expulsion as set forth in Bylaws, Article II, Section 2.3.

## WI Code of Ethics:

WOODWORK INSTITUTE Members, Member-Licensees, Non-Member-Licensees and their staff, are expected to conduct themselves in an ethical and professional manner.

The following Code is intended to serve as a basis for the ethical conduct of the INSTITUTE'S Members, Member-Licensees, Non-Member-Licensees and their staff, as such it will also serve as the basis for judging the merit of a formal complaint.

It is understood that some words and phrases are subject to varying interpretations, and that an ethical principle may conflict with another. Questions related to ethical conflicts can best be answered by thoughtful consideration of the fundamental principles, rather than reliance on detailed or specific regulations.

As a WOODWORK INSTITUTE Member, Member-Licensee, Non-Member-Licensee and staff, I will:

1. Be fair and take action not to discriminate or cause harm to others while respecting the values of equality, tolerance, and equal justice.
2. Not do anything which compromises or which is likely to compromise the impartiality of those who work for, or on behalf of, the INSTITUTE.
3. Be honest and trustworthy, will not make deliberately false or deceptive claims, be honest about my qualifications and circumstances that might lead to conflicts of interest. I will exercise care not to misrepresent the INSTITUTE, or its positions and/or policies, nor conduct myself in a manner to bring my position as a member into disrepute.
4. Know, respect, and follow the policies and/or procedures of the INSTITUTE, while acknowledging and supporting proper authorized use of the INSTITUTE'S resources.
5. Not use my position improperly to confer on, or secure for myself, an advantage or a disadvantage on another.
6. Not disclose information given to me in confidence, or information acquired which is of a confidential nature, without proper consent, or unless required to do so by law.
7. Honor contracts, agreements, and specifications, especially those requiring compliance to the *Architectural Woodwork Standards* and/or Certified or Monitored Compliance.
8. Strive to achieve the highest quality, effectiveness, dignity, and professional competence, while managing my personnel and resources to enhance the quality of our professionalism.
9. Uphold principles of this Code and promote the same to other Members, Member-Licensees, Non-Member-Licensees and their staff.
10. Treat violations of this Code as inconsistent with proper Member, Member-Licensee, and Non-Member-Licensee behavior, and understand that by engaging in gross misconduct, my membership may be terminated.

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### We hereby apply for Active Membership with the Woodwork Institute:

Firm: \_\_\_\_\_ Contact: \_\_\_\_\_

Mailing Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone #: \_\_\_\_\_ Fax #: \_\_\_\_\_ County: \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Legal Structure:  Individual  Partnership  Corporation  Other: \_\_\_\_\_

Federal ID#: \_\_\_\_\_ Business Lic #: \_\_\_\_\_

State Contractors License #: \_\_\_\_\_ Classification: \_\_\_\_\_ RME or RMO: \_\_\_\_\_

Owner / Manager: \_\_\_\_\_ Home Phone # \_\_\_\_\_

Home Address: \_\_\_\_\_

Average # of Employees: \_\_\_\_\_ Office \_\_\_\_\_ Shop \_\_\_\_\_ Warehouse \_\_\_\_\_ Installation \_\_\_\_\_ Total \_\_\_\_\_

Firm specializes in: \_\_\_\_\_

Firm has been in business since: \_\_\_\_\_ Principals have been in industry since: \_\_\_\_\_

Gross Sales (subject to verification): \_\_\_\_\_

Certificates held:  FSC  SFI  Other: \_\_\_\_\_

Liability / Casualty Insurance Carrier: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Workers Comp. Insurance carrier: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Workers Comp. Insurance Experience Mod. \_\_\_\_\_ %

Accountant: \_\_\_\_\_ Address: \_\_\_\_\_

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**Company Statement** (25 words or less, for *Membership Roster & website listing*):

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**Application Fee/Dues Calculations and Payment:**

Application Fee	\$ 525.00
Annual Membership Dues* (Subject to the dues as stated on front page)	\$ _____
	Total: \$ _____

\*In the event of a rejected application, Membership Dues will be repaid in full. Application fees are non-refundable.

**Payment Method:** (application fee & membership payment must accompany the application before it can be processed)

Check (enclosed)

Visa     Master Card    (For credit card payment, please complete the following)

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**Credit Card Information and Charge Authorization:**

Cardholder Name: \_\_\_\_\_ Card Number: \_\_\_\_\_

Signature: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Billing Address Zip Code: \_\_\_\_\_

Amount to be charged: \$ \_\_\_\_\_

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As applicant or duly authorized "Designated Representative" of the applicant firm, I hereby attest that I have thoroughly read and agree to the INSTITUTE'S policies and procedures of applying for Active Membership as herein stated. I declare under penalty of perjury that the contents of this application, including attachments that I have provided, are true and correct and I authorize the INSTITUTE to verify its contents. I acknowledge and pledge to adhere to the INSTITUTE'S Code of Ethics. I also acknowledge and pledge to adhere to the INSTITUTE'S policies, rules, regulations, and bylaws, all applicable laws and regulations, and the reasonable decisions of duly constituted committees of WI.

Authorized Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

In principle and in practice, the WOODWORK INSTITUTE values and seeks diverse and inclusive participation within the architectural millwork industry. The INSTITUTE promotes involvement, access, and leadership opportunities to all members regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality, or disability.