

## HeatSmart Alliance Individual Member Agreement

Approved 06-12-2020; Updated 03-26-2023

This Agreement is between me, the undersigned, and the HeatSmart Alliance (the Alliance), a non-profit organization. An Individual Member has privileges to:

- Access to all Alliance communications including email lists and Slack workspaces
- Access and contribute to shared documents and data on Google drives
- Participate in all general and working group meetings
- Vote on matters of significance
- Serve in un-elected roles
- Nominate or be nominated for elected roles
- Identify themselves as a member
- Additional privileges that may arise as the Alliance evolves.

As an Individual Member of the Alliance, I agree to:

- Work collaboratively, openly, and in good faith with other members to accomplish the Alliance's mission
- Keep current with Alliance correspondence
- Participate regularly in Alliance meetings
- Maintain shared documents and correspondence in an orderly fashion, and protect confidential information appropriately
- Make materials, documents, and tools that I share with the Alliance available to the Alliance without restriction, unless the material/document/tool is marked otherwise in advance of dissemination
- To the extent practical, maintain transparency while performing membership duties
- Participate in one or more Alliance working groups
- Avoid unilateral actions or decisions that could have significant implications for the Alliance, including its mission, policies, monetary expenditures, and public image
- Avoid conflicts of interest, including appearances of conflicts of interest. This includes, but is not limited to:
  - Avoiding the potential for financial gain within one's immediate family that results directly or indirectly from the sale or installation of any heat pump
  - Refusing to accept gifts that have value of any consequence from individuals or organizations that have the potential for financial gain directly or indirectly from the sale or installation of any heat pump
- Serve the Alliance for a term of at least one year, circumstances permitting, with the understanding that I may terminate my membership by written notice at any time
- Serve with the understanding that the Alliance will not compensate me for my service to the Alliance, except to reimburse me for out-of-pocket expenses that are directly related to the mission of the Alliance **and** approved in advance by the Treasurer of the Alliance.

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

Mailing Address: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_ Gmail Address\*: \_\_\_\_\_

Date Signed: \_\_\_\_\_

**Which Working Group(s) would you like to join? (Check at least one.):** \_\_\_ Organization & Membership;  
\_\_\_ Operations; \_\_\_ Coaching; \_\_\_ Marketing & Communications; \_\_\_ Technology; \_\_\_ Policy; \_\_\_ Installer Relations

\* If you don't already have a gmail address, please create one at [accounts.google.com](https://accounts.google.com)