

NAEA Affiliates

August 2023



Affiliate Mission:

To engage and empower enrolled agents at the state and local level through education, networking, and community events.

To advance the profession by promoting the EA credential, providing continuing education, leading state advocacy efforts, and providing leadership and volunteer opportunities for members.

NAEA and Affiliate Collaboration

- Affiliates and NAEA will engage through events, education, advertising, and leadership.
- Everyone works together professionally and collaboratively regarding legislation and regulatory issues related to the EA right to practice
- NAEA and affiliates will collaborate on strategic initiatives that elevate and support the EA profession.

State Affiliates Expectations

- Chartered as NAEA State Affiliates
- Separately incorporated nonprofits
- Individually governed by their own Board of Directors and Bylaws
- Maintain active corporate status in their state
- Follow state and federal tax laws
- File their own annual tax returns
- Manage own membership dues/renewals/roster
- Adhere to the state affiliate provisions in the NAEA bylaws

Membership Operations

- Affiliates will perform all membership functions
 - Build a database or obtain an Association Management System (AMS)* to maintain member data
 - Create an online join process for new members
 - Create an online renewal process for renewals
 - Perform monthly and annual member communications and renewal functions

*NAEA will work with a group of affiliate representatives to evaluate AMS options and attempt to negotiate a group pricing model. NAEA will provide current membership data export and assist with the import of the data into the new AMS.

NAEA Commitments to Affiliates

- Working with affiliates to promote the EA credential
- Continue defending state-level EA right-to-practice issues
- Providing state-level advocacy assistance
 - Using NAEA Legal Defense Funds when appropriate
- Training volunteers and affiliate leadership - SSLA
- Promoting affiliate membership and programs
- Coordinating joint membership campaigns to new EAs
- Supporting future EAs through the Education Foundation
- NAEA will not create a chapter in a territory that has an NAEA affiliate

Affiliates Commitments to NAEA

- Monitoring EA right-to-practice issues
- Providing member volunteer and leadership opportunities
- Promoting the EA credential
- Providing continuing education and networking for EAs
- Providing NAEA with updated affiliate leadership contact information annually
- Continuing to provide NAEA with annual form 990 Tax Returns and amended bylaws (if applicable)
- Promoting NAEA membership and programs

Affiliate Council Committee

- Continues to serve affiliates and NAEA
- Serves as liaison between the affiliates and NAEA
- Monitors state-level advocacy issues
- Participates in semi-annually meetings with NAEA
- Includes an NAEA Board of Directors Liaison
- Communicates strategic initiatives between NAEA and affiliates

Affiliate Status

- Affiliate will notify NAEA of continuing affiliate status by (TBD)
- Affiliate may conduct member bylaws vote to remove the dual membership requirement
 - (This vote is at the Affiliate board's option.)
- Affiliate will establish a membership administration system by (TBD)
- NAEA will provide a final membership list and dues on (TBD)
- NAEA will inform all members of membership renewal options by (TBD)
- NAEA will encourage Enrolled agents to be members of NAEA and one or more state affiliates
- NAEA will provide links to Affiliate join pages on the NAEA join page

NAEA Ongoing Support of Membership

- NAEA will encourage Enrolled Agents to be members of NAEA and one or more state affiliates
 - NAEA will provide links to Affiliate join pages on the NAEA join page
- NAEA will provide affiliates lists of new EAs in their territory biannually
- NAEA will provide lists of NAEA members in the affiliate
- NAEA will coordinate joint membership campaigns with affiliates
- NAEA will provide affiliates with customizable, template membership promotions and materials



NATIONAL	AFFILIATES
Development and execution of organizational strategy, mission, vision	Development and execution of state-level initiatives and strategies, collaborate on NAEA initiatives
Branding, marketing, and communications – for all NAEA and chapter programs and activities	Affiliate communications and marketing including membership recruitment and retention.
National level advocacy and IRS/Congress outreach	State level advocacy and legislative initiatives
NAEA (and chapter) operations, administration, event support, and IRS CE administration	Operations, administration, event support, and IRS CE administration
Consolidated audit, 990, financial oversight	Financial oversight and tax filings per federal nonprofit and state regulations
Annual nationwide conference and online education	State programs and events
National partnerships and business development	State and local partnerships and sponsorships
NAEA Education Foundation – scholarships, fundraising, and EA career awareness initiatives and programs	Support EA Career awareness and student outreach
NAEA PAC – fundraising and advocacy	Address specific state level issues as needed – with assistance from NAEA GR and Legal Fund