



A GUIDE FOR ORGANIZING NEW AFFILIATES



FELLOWSHIP * INFORMATION * RECOGNITION * SERVICE



Designed to provide general assistance and suggestions for educational office professionals desiring to start a new affiliate of educational office professionals in their state or area.





PREFACE

The National Association of Educational Office Professionals has prepared this publication to promote and encourage professionalism in the workplace and the associations of all educational office professionals.

“NEVER DOUBT THAT
A SMALL GROUP OF
THOUGHTFUL,
COMMITTED PEOPLE
CAN CHANGE THE
WORLD, INDEED, IT
IS THE ONLY THING
THAT EVER HAS!”
MARGARET MEADE

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“ENJOY THE JOURNEY! NAEOP WILL TAKE YOU MANY PLACES IN YOUR PERSONAL AND PROFESSIONAL LIFE. YOU WILL SCALE THE MOUNTAINS OF LEADERSHIP AND COMMITTEE WORK, YOU WILL RIDE THE WAVES OF AWARDS AND DISAPPOINTMENTS, YOU WILL LEARN AND GROW AS A MEMBER AND AS A PERSON. ENJOY! ENJOY! ENJOY!

~KATHY LECH, CEOE

NAEOP PRESIDENT, 2010-11

INTRODUCTION

People, from time immemorial, have instinctively banded together in common interest. They learned early that an association of individuals with common goals is capable of accomplishments far beyond those of any one person.

In every group there is always someone with an instinct for organization; that person must take the initiative to contact others with the same interests—in this case, educational office personnel—to meet together. From this initial meeting comes the nucleus of an organization.

WHY START AN AFFILIATE?

There is always a need for leadership training, peer support, professional development training, conference/workshop opportunities and recognition among educational office professionals. Local affiliates have the ability to reach out to educational office professionals within their own educational sphere of influence. By providing a forum for the exchange of ideas, you are better able to provide the tools necessary to enable more efficient and effective service and allow individuals the opportunity to experience personal and professional growth.

Don't lose sight of the value of providing opportunities for your members to give service to their local community through service projects. Many affiliates, both local and state, annually plan community service activities such as providing scholarships for graduating seniors or re-entry scholarships, programs that provide needed services and goods for

the men and women in military service, programs that provide needed clothing and personal hygiene items for the homeless or battered women, etc. The list goes on and on. Community service activities not only provide opportunities to give members a sense of pride, satisfaction and accomplishment, but may also provide tangible benefits such as awards, job and education certifications and more.

And, don't forget to have fun! Sharing fun can increase creativity and the willingness to be of service. Fun breaks up boredom and fatigue, and improves communication within your association. And, having fun together counteracts conflict and tension.

HOW DO WE OBTAIN SUPPORT FROM OUR ADMINISTRATION?

Once you have determined that a new affiliate is needed, **believe in your vision!** Work together to make your dreams become reality by believing in yourselves and the benefits realized through working together as an educational office professional association. Most importantly, don't lose the enthusiasm.

Do your homework. Prepare a written request to your local administrators on the benefits of having a professional

organization for the educational office professional and include information on how opportunities for professional development and leadership training



will make a stronger, more productive and more efficient educational office team.

Follow-up on your request with a meeting with administrators. Go to the meeting prepared and include other local educational office professionals with you. Be sure to proof-read your written materials and dress professionally for the meeting.

Check with the Secretary of State for your individual state to determine state laws for starting an association and obtain your EIN number through the Internal Revenue Service (www.irs.gov).

“PERHAPS THE FIRST AND BIGGEST BENEFIT PEOPLE GET FROM VOLUNTEERING IS THE SATISFACTION OF INCORPORATING SERVICE INTO THEIR LIVES AND MAKING A DIFFERENCE IN THEIR COMMUNITY AND COUNTRY. THE INTANGIBLE BENEFITS ALONE – SUCH AS PRIDE, SATISFACTION AND ACCOMPLISHMENT – ARE WORTHWHILE REASONS TO SERVE.”

WWW.NATIONALSERVIC.GOV



READY TO GET STARTED?

A good first step is to talk to other relatively new affiliates. If you don't know who to contact, contact any of the NAEOP Executive Board members. Another good resource is the current leadership or past presidents of your state affiliate. Before you schedule your first meeting, contact other functioning educational office associations to request copies of constitutions and bylaws, agendas, programs and other informational material that may be used as a guide.

Here are the basic steps to follow in forming a local or state association of educational office professionals.

1. Develop a letter to invite all local educational office personnel to attend an organizational meeting. A sample letter is provided for you later in this publication.
2. Locate a central meeting location and confirm the availability of that room.
3. Identify and select a temporary chairman who will call the meeting to order and a temporary secretary who will take minutes..
4. Recognize someone, usually one of those who initiated the meeting, to state the purpose of the called meeting.
5. Allow time in your meeting for a good discussion on reasons for organizing, selection of a name, determination of membership qualifications, proposed dues amount, number of officers and representatives, and the parliamentary authority to be adhered to.
6. Form a committee to develop the Bylaws and Standing Rules for the new organization with a time limit placed on the completion of those documents.
7. Adjourn your organizational meeting with a stated time and date for the next meeting.

BRAND YOUR ASSOCIATION

From the beginning, people will form an image of your association. Your image, or your “brand,” will be established by the plans you make, the events you hold, and especially by how friendly you are. “Branding” is the process by which your association becomes known—and from that brand will come an image in the thoughts and feelings of other educational office professionals and administrators. It could be the professional development opportunities you offer, the type of speakers you bring in to various events, how you respect your members, how well you communicate, etc..

A great brand is about value and the availability of knowledge. Great branding is when your affiliate becomes known as the association to

belong to in order to receive up-to-date knowledge. Great branding is about intimate relationships and community. Implementing a great “brand” for your new association is very important.

Here are some helpful reminders:

- Collectively agree on the goals of your new affiliate.
- Using your goals, build a coherent and unified image of your association.
- Create an identity for your new affiliate through the design and selection of your own emblem (crest). Make sure your new logo is recognizable and easily identifiable. Use that new identity in all written publications and flyers from your association.

- Remember your “brand” as you develop your promotional materials and your website. For example, if you want to be known for excellence or service, do your materials and your website reflect that image?
- Build your “brand” with diligence, long-term commitment and a positive attitude.

“BROCHURES, LETTERHEAD,
ENVELOPES, NEWSLETTERS, AND
MAGAZINES ALL REFLECT ON YOUR
ASSOCIATION. HOW DO YOURS
REPRESENT YOU?”

WWW.ASAECENTER.ORG

Keeping the Association Alive

For a new association to grow in size, strength and stature, it must fulfill the needs and expectancies of those it serves. Its ability to do so is basically a matter of goals, communication, and involvement.



Following are some specific suggestions for keeping associations alive:

1. Plan interesting programs.
2. Plan your activities one year in advance.
3. Make activities and meetings diversified and fun.
4. Sponsor at least one professional development activity each year.
5. Keep the business portion of your meetings at a minimum and make sure your general membership is aware of the business meeting dates.
6. Schedule social as well as educational meetings.
7. Encourage wide representation on the executive board.
8. Hold meetings at different locations.
9. Publish an effective newsletter.
10. Strive for good publicity.
11. Remain in close touch with members and don't forget the benefit of a personal touch.
12. Appoint area representatives if the association is too large.
13. Retain an element of flexibility.
14. Ask for program suggestions from members.
15. Solicit the support of the administrative staff and the board of education.
16. Provide leadership opportunities for your members by getting them involved as a program or committee chairman.

Use the following benefits to add to those you think of for advertising your new affiliate and inviting other educational office professionals to join your new affiliate:

What are the Benefits of an Affiliate?

- Opportunities to acquire leadership skills working with highly motivated educational office professionals as role models and mentors.
- Networking opportunities for interrelating with others who have common interests and concerns while gaining stature through the pursuit of professionalism.
- Encourage professional growth through workshops on local, state and national level.
- Provide a clearinghouse for administrators and members for ideas and methods, which will result in a finer and more efficient service to the schools and community.
- Learn organizational skills from committee service.
- Increase job effectiveness with skill-building workshops.
- Become more proficient with using technology on the job.
- Receive scholarships for re-entry training and job advancement.
- Meet new friends.
- Promote professional interest in educational classified positions.

Suggested Philosophy for New Affiliates

- We believe that the educational office professional has unidentified potential to be developed to assist administration in its many responsibilities.
- We believe the _____ AEOP can be of value by continuing its programs of professional growth for the individual, professional standards, and in-service education.
- We believe _____ AEOP's value can be extended by providing opportunities for administrators to explore with the educational office professional methods to provide in-district programs to develop the potential of the educational office professional for tomorrow's needs.



Developing Your Bylaws

Members who know the purpose and objectives of the new affiliate should be delegated to draw up the Bylaws and Standing Rules. At least five members should be appointed by your Chairman-Pro-Tem to research the most suitable format for the organization. Guides for formats also include:

1. NAEOP Bylaws and Standing Rules.
2. State professional organization Bylaws and Standing Rules.
3. Bylaws and Standing Rules of like organizations.

The content of your Bylaws should include:

1. Name of Association.
2. Statement of purpose or mission.
3. Categories of membership and qualifications for each category, including voting privileges.
4. Board structure, officer positions and their terms, duties and powers, as well as procedures for filling unexpected officer vacancies.
5. Voting provisions and procedures.

6. Meetings (including the date of your annual business meeting), including criteria on the scheduling of special meetings.
7. Accounting, fiscal and reporting procedures, including presentation of annual audits.
8. Procedures for amending bylaws.
9. Procedures for dissolution of the association.

The content of your affiliate's Standing Rules should include:

1. Order of Business.
2. Duties of Officers.
3. Duties of Committees.
4. Elections.
5. Dues.
6. Amendments.



“THROUGH PARTICIPATION IN MY ASSOCIATION’S BYLAWS AND POLICIES COMMITTEE, I GAINED VALUABLE KNOWLEDGE OF OUR ASSOCIATION. I LEARNED WHY WE DO WHAT WE DO, AND HOW WE CAN MAKE IT BETTER FOR OUR FUTURE LEADERS. I RECOMMEND THIS COMMITTEE TO EVERY NEW MEMBER.”

TERESA PRICE (DELAWARE)

Helpful Hints for Developing Bylaws and Standing Rules

- Make sure that all board members are given copies of and are familiar with your organization’s bylaws.
- Be aware of our changing world of technology in the wording of your new bylaws. Avoid language that forces you to use a particular form of communication (i.e. U.S. postal mail, electronic communication, etc.).
- Avoid gender specific language.
- Remember, if you state specific dues amounts in your bylaws, should your board recommend a change in the future, it will require following the process to amend bylaws.
- Avoid stating the specific number of votes needed to pass a resolution or bylaws change.
- Identify your mission statement before you begin writing your bylaws.
- Identify your parliamentary authority (i.e. Roberts Rules of Order).
- Don’t hyphenate the word “bylaw”.
- Provide for a bi-annual review of your bylaws.
- Give adequate notice to your membership about the date for final approval of your bylaws. After final adoption, record the original date of adoption and dates of subsequent amendments at the bottom of each page.
- Standing rules assist in the orderly transaction of business. These rules may be suspended at any time by a majority vote or they may be amended or rescinded by a two-thirds vote.
- Helpful websites for developing bylaws include:
 - <http://www.parlipro.org>
 - <http://www.aipparl.org>

“DON’T REINVENT THE WHEEL IN SETTING UP YOUR CONSTITUTION, BYLAWS OR STANDING RULES. LOOK AT THE NAEOP WEBSITE UNDER THE AFFILIATES SECTION; MOST WILL HAVE THEIR ORGANIZATIONAL DOCUMENTS LISTED. IF NOT, CONTACT THE ASSOCIATION PRESIDENT OR CHAIRMAN OF THE BYLAWS COMMITTEE, THEN ADAPT ACCORDINGLY TO BEST FIT YOUR NEEDS.”

PAM POSEY, CEOE, NAEOP PAST PRESIDENT (MISSISSIPPI)

Sample Invitation to your Colleagues.....

Invitation to Educational Office Professionals in

_____ School District/University/County

Do your skills need to be updated? Are you in need of training? Do you feel alone in your one-person office? Or perhaps you're in a school office (so you're never alone) and you'd appreciate having a supportive network throughout the county who face similar issues and situations as you do every day.

The opportunity is here for you to be part of the charter group of the newly-formed _____ Association of Educational Office Professionals (____AEOP), a non-profit, non-negotiating association providing professional growth, networking, community service, and scholarship opportunities for professionals like YOU.

We're excited! This new affiliate offers something for us, founded by us under the leadership of our state and national affiliates. We are impressed and we can't wait to bring its benefits to you in your own school, district, county office of education, college and university offices. Together, we can accomplish so much!

Membership in the _____ Association of Educational Office Professionals is open to all individuals in non-certificated, office professional positions in _____ County's public or private educational institutions. Come to the free informational meeting and learn more about the benefits of membership.

Helpful hints:

Come ready to be inspired and have a good time!

_____ Association of Educational Office Professionals

Informational Meeting

[date] [time] [location]

- *Include directions to meeting location.*
- *Invite a key administrator to speak for a few minutes about the value of membership in professional organizations.*
- *Include an RSVP in your invitation so you know how many to plan for.*
- *Bring refreshments.*
- *Make sure your written materials have been proofed and include your contact information.*

Goal 1: Professional Development. Participate in relevant and unique educational opportunities locally.

Goal 2: Networking. Associating professionally and personally with people with whom you have so much in common.

Goal 3: Community Service. Together we will develop programs for providing community service for our members, our students and our community.

Goal 4: Scholarships. Providing monetary rewards for the success of our students and our members.



"AN EMPLOYEE THAT FEELS VALUED,
RESPECTED AND APPRECIATED IS A
BENEFIT FROM BELONGING TO AN
AFFILIATE. THE NAEOP MOTTO SAYS IT
ALL -- SERVICE, FELLOWSHIP,
RECOGNITION, INFORMATION. EVERYONE
SHOULD HAVE THE OPPORTUNITY TO
DEVELOP INTO THE BEST THEY CAN BE,"

PAT THOMPSON (UTAH)

SAMPLE PRESS ADVISORY

As stated earlier in this Guide, communication plays a vital role in the success of building and maintaining your affiliate. Don't assume that by simply sending one notification to a large school district office, that the news will be communicated throughout the office. The following *Press Advisory* can be one of the tools used to announce your organizational meeting in a local newspaper or in a future publication of education-related organizations, such as those for administrators, school board members, etc.

XYZ ASSOCIATION OF EDUCATIONAL OFFICE PROFESSIONALS

PRESS RELEASE

[DATE]

Contact: [name] [phone #]

The _____ Association of Educational Office Professionals will hold an informational meeting on _____, ___(date)_____ at _____ am/pm at _____(location).

Founding member, _____, invites all individuals who work in the school district offices/ university offices of _____ (*name of school/district/university*) to attend this important informational meeting. Membership in the _____ Association of Educational Office Professionals is open to all non-certificated office professionals in public and private schools, district offices, the county office of education, colleges and universities. Goals of the Association, a non-profit and non-negotiating affiliate, include providing professional development and leadership training, networking, community service and scholarships for students and members.

Include information on who will chair the meeting and any special guests who will speak.

Include information at the end about who to contact to RSVP for the informational meeting.

MEMBERSHIP

One of your first duties as a new affiliate will be to establish your membership classifications and dues.

Affiliate membership dues range in price and the amount should be set according to what your local members would be willing to pay. The most common categories of membership are Active, Retiree, Associate and Institutional. Remember to record the join date and calendar when to mail membership renewal notices to avoid any lapse in membership years.

An Associate Member may be someone who does not meet the qualifications of membership, but wants to stay up-to-date with the activities of your association. This could include an administrator or an individual who works for a company associated with your school district, but not in an educational setting.

Some affiliates offer institutional memberships for school districts, colleges and/or universities. The fee for the institutional membership should be established so it doesn't interfere with gaining active members.

“HAVING A DIVERSE
MEMBERSHIP POPULATION
WITH A VARIETY OF
REASONS TO JOINING AN
ASSOCIATION REQUIRES
DIFFERENT STRATEGIES.”

WWW.ASACENTER.ORG

Membership Application

ASSOCIATION OF EDUCATIONAL OFFICE PROFESSIONALS

20__ - 20__ Year

Name: _____

Mailing Address: _____

City: _____ County: _____ Zip: _____

School/District/College: _____

Position: _____

E-mail Address: _____ Birthday: _____ (Month/Day)

Work Phone: (____) _____ Home Phone: (____) _____

Cell Phone: (____) _____

Type of Membership:

<input type="checkbox"/> Active, New	\$ _____.00	<input type="checkbox"/> Active, Renewal	\$ _____.00
<input type="checkbox"/> Retired, New	\$ _____.00	<input type="checkbox"/> Associate	\$ _____.00

Are you a member of another local/state affiliate)? Yes No

If Yes, which one? _____

Are you a member of NAEOP (National)? Yes No

I may be interested in serving on a committee or helping with a _____ AEOP event?

Yes No

Do you have special interests and/or recommendations for future professional development?

Yes No

If Yes, please give more details:

Referred by: _____

Please make your check payable to _____ AEOP and mail to:



Now that you're organized.....Affiliate with NAEOP

Affiliation with NAEOP will provide great rewards for your affiliate members and officers. The NAEOP Affiliation Program provides an opportunity for local, county, regional and state associations to affiliate with a national organization and to participate in national projects and programs which benefit office professionals in education. The Affiliations Program is a central "clearinghouse" where ideas and suggestions from all affiliates may be sorted, sifted, combined and revised, and then returned to the membership as workable programs, which benefit affiliates, each member and NAEOP. Affiliation promotes professional unity from the local through the national levels. It serves as a medium for recognition of the profession, the association and the member.

Advisory Council:

The NAEOP Advisory Council is composed of one delegate from each association affiliated with NAEOP. The Advisory Council meets annually immediately preceding the NAEOP Annual Conference.

The purpose of the Advisory Council is to give a voice to the affiliates in making recommendations for improvements and changes to the Association and to elect two members to each of the standing committees of the Association. All Advisory Council agenda items having been discussed during the Council meeting are presented to the membership at the next annual business meeting of the Association. Agenda items may either be presented for action (by way of

a motion), a recommendation for no action, or a recommendation to send it to a standing committee for further study.

Benefits of NAEOP Affiliation:

- Advisory Council Delegate—each affiliated association may send a delegate to the annual Advisory Council meeting.
- Field Service Program—Upon request, NAEOP board members will visit affiliated associations to present speeches, workshops, installations, etc. To request a visit, complete the [Field Service Request Form](#) located under Affiliates on the www.naeop.org website.
- Network and exchange of information.
- Nominate candidates for the Marion T. Wood Student Scholarship Award.
- Nominate a candidate for the Olive T. Ritchie Educational Office Professional of the Year Award.
- Nominate a candidate for National Educational Administrator of the Year Award.
- Participate in the Louise Henderson Nelson Awards Program.
- Nominate your affiliate for the NAEOP Website Award.
- Host a NAEOP Annual Conference.
- Develop leadership potential through participation in conferences, institutes, and programs of NAEOP.



How to Affiliate

The Application for Affiliation form may be found on the NAEOP website under "Affiliates," or you may request a copy from the Affiliations and Advisory Council Chairman.

Affiliation year is August 1 to July 31. Affiliation is \$25.00 plus 10 cents per member for each local member of the preceding year. New associations will pay \$25.00 plus 10 cents per charter member.

Associations with a local membership of 20 or less are required to have an elected officer and one (1) additional person as NAEOP members to affiliate.

Associations with a local membership between 20 and 50 are required to have an elected officer and two (2) additional NAEOP members to affiliate.

Associations with a local membership over 50 are required to have an elected officer and three (3) additional NAEOP members to affiliate.

Associations with local membership of ten (10) or less are required to have one person as a NAEOP member to affiliate.

Affiliation will not be approved until all requirements are met. No refunds will be made after affiliation is accepted.

"THE EDUCATIONAL OPPORTUNITIES OFFERED BY NAEOP ARE SO SIGNIFICANT TO ALL EDUCATIONAL OFFICE PROFESSIONALS, WHETHER THROUGH THE VARIOUS NEWSLETTERS, THE WEBSITE OR CONFERENCES/INSTITUTES. ALSO, NAEOP IS A HUGE SUPPORTER OF LOCAL AFFILIATES, HELPING THEM WITH IDEAS ON HOW TO RUN A SUCCESSFUL AFFILIATE, PROVIDING IMPORTANT AND USEFUL PUBLICATIONS, AND OFFERING PROFESSIONAL SPEAKERS."

WENDY HESLINK, CEOE (NEW YORK)

JOB DESCRIPTION....the PRESIDENT

You are the elected leader of your organization. You should have a workable knowledge of parliamentary procedures and be familiar with the objectives, bylaws and other rules of the organization. You do not have to memorize everything, but you do need to know where to find the answers. Of course, you will set the example in impartiality, courtesy and obedience to rules. Check the bylaws and other standing rules of your organization for the specific duties of your office.

In general, a president is expected to:

1. Be the official representative of the organization.
2. Preside at the association's annual conference, workshops and all meetings of the organization and of the Board.
3. Refer to oneself as the Chairman ("P" is not used).
4. Call meetings to order on time.
5. Determine that a quorum is present.
6. Announce, in proper order, the business to come before the membership and distribute a printed agenda.
7. Recognize members entitled to the floor.
8. State and put to vote all questions that legitimately come before the assembly.
9. Announce the result of each vote and the effect of the action.
10. Expedite business in every way possible without denying the members their rights.
11. Enforce rules of debate, order and decorum.
12. Decide all points of order (subject to appeal).
13. Respond to relevant questions of members.
14. Refrain from voting except when vote is by ballot, or when the vote would change the result.
15. Declare the meeting adjourned at the proper time (by general consent or by a vote of the assembly).
16. Carry out administrative and executive duties outlined in bylaws or as directed by assembly.
17. Appoint chairmen of standing committees with approval of the Executive Board.
18. Prepare a report to be given at the annual meeting.
19. Give all materials pertaining to the office to the newly elected president.
20. Represent the affiliate at the NAEOP Annual Conference/Institute as provided for in the annual budget. In the event the President cannot attend, the Executive Board may select an alternate.
21. Provide leadership for the development of the association's annual budget ensuring that the



association's goals and mission are the focus.

22. Work with the meeting planner for the affiliate to provide needs for meetings and a proposed agenda.
23. Review and provide leadership for any contracts with hotels for meetings.

The bylaws may provide for the president to be an ex-officio member of all committees except the nominating committee. This is not a duty of the office, but is a privilege granted by the bylaws. Without such a provision, the president has no more right to attend the meetings of a committee than any other member of the organization who is not a member of the committee.

Ex-officio means "by virtue of office" and if given this privilege, the president has all of the rights which are extended to other members of the committee - to make motions, debate, vote, etc. The president is not obligated to attend committee meetings and is not counted in the quorum, but it is the duty of the chairman of the committee to notify the president of each committee meeting.



"A QUOTE FROM THE STAR TREK MOVIE APPLIES TO LEADING AN ASSOCIATION. MR. SPOCK STATED IN THE MOVIE 'THE NEEDS OF THE MANY OUTWEIGH THE NEEDS OF THE ONE'. BEING A LEADER IS NEVER ABOUT PERSONAL GRATIFICATION BUT MORE ABOUT LEADING THE ORGANIZATION IN THE RIGHT DIRECTION. MAKING THOSE KINDS OF DECISIONS DOES NOT ALWAYS MAKE YOU POPULAR, BUT I FEEL THEY ALWAYS MEAN YOU DID THE RIGHT THING."

LINDA SOCKWELL, CEOE, NAEOP PAST PRESIDENT (TEXAS)



JOB DESCRIPTION...the PRESIDENT-ELECT

The President-Elect shall have served as a member of the Executive Board for at least two (2) years, shall be elected for a term of one year, or until a successor is elected, and shall succeed the presidency at the end of the term. In general, a President-Elect is expected to:

1. Attend Board meetings and Association meetings and give progress reports as necessary.
2. Perform the duties assigned by the President with the approval of the Executive Board.
3. Assume the duties of the President in the President's absence.
4. Succeed the President.
5. Represent the affiliate at the NAEOP Annual Conference/Institute, and any other NAEOP event as provided for in the annual budget. In the event the President Elect cannot attend, the Executive Board may appoint an alternate.
6. Stay in contact with the local affiliates and assist affiliates.
7. Coordinate with District Directors (if applicable) for an Affiliates' Program presentation at the Association's Annual Conference, and coordinating with the Meeting Travel Planning Committee for site visitations to future meeting places.
8. Coordinate selection and purchase of gift for outgoing president each year.
9. Maintain and complete procedure guidelines for successor.

JOB DESCRIPTION...the SECRETARY

An organization may have as many officers as it deems necessary, but in order to function properly it must have a presiding officer (president) and a recording officer (secretary). Usually the duties of a secretary are to:

1. Keep accurate minutes of all business meetings of the association and the board.
2. Serve as custodian of the records of the association.
3. Insure access to association records by all members.
4. Maintain membership list (unless covered in job description of Membership Chairman).
5. Write correspondence and send out notices, including thank-you letters for donations.
6. Work in close harmony with the president.
7. Prepare agendas for meetings unless the president prefers to prepare his/her own agenda.
8. Keep a file of records of the association, including a file of all committee reports.
9. Keep assigned record books up-to-date.
10. Take the following to each board meeting: minutes book, paper/pen, agenda, bylaws, rules of standing committees, and any records or supplies which may be needed.
11. Preside over meetings in the absence of both the president, president-elect and vice president, and preside until a temporary chairman is elected by the assembly.
12. Provide a draft copy of minutes for approval by the president as soon as possible after each meeting.
13. Submit minutes for approval at the next meeting of the board.
14. Perform other duties as may be assigned by the president.
15. Maintain and complete procedure guidelines for successor.



JOB DESCRIPTION...the PAST PRESIDENT

The Past President is responsible for assisting the President and Executive Board in any way possible. In general, a past president is expected to:

1. Attend all board meetings and association meetings/events and give progress reports as necessary.
2. Act as a resource person for Executive Board members.
3. Act as chairperson for a Nominating Committee to select the slate of officers for the following year and report to the Executive Board on the slate of officers nominated..
4. Prepare the ballot and mail to all members of the association whose dues are current.
5. Serve as an ex-officio member of the Bylaws Committee.
6. Serve as chairman of the Life and Honorary Membership Awards committee to receive nominations which will be presented to the Executive Board for approval.
7. Act as Historian and maintain a pictorial and narrative history.
8. Maintain and complete procedure guidelines for successor.

"IN MATTERS OF STYLE, SWIM WITH
THE CURRENT; IN MATTERS OF
PRINCIPLE, STAND LIKE A ROCK."

THOMAS JEFFERSON

JOB DESCRIPTION...the TREASURER

The Treasurer is the custodian of the funds and financial records of the association. It is the treasurer's responsibility to insure that the financial records are properly kept and maintained. In general, a treasurer is expected to:

1. Coordinate the development of the proposed annual budget.
2. Operate as custodian of the money, including collecting, depositing and disbursing funds.
3. Process payment from the association for all authorized expenditures.
4. Ensure that all bank account signature cards are up-to-date, properly signed and in the hands of the proper bank officials.
5. Provide receipts for membership dues income through an actual receipt or membership card. Membership categories and dues for each category should be annually reviewed and approved by your Executive Board. Any changes must be announced and

approved in your Annual Business Meeting. Remember that, should the actual amounts of dues be stated in your bylaws, you must follow the process for amending bylaws.

6. Provide receipts to donors for all other cash donations.
7. Prepare and submit a treasurer's report to the executive board of the association at each meeting, including the balance on hand at the beginning of the period for which the report is made, receipts (funds received), disbursements (money paid out), and the balance on hand at the close of the period for which the report is made.
8. Maintain and complete procedure guidelines for successor.

Remember that a treasurer's report is never adopted; it is read for information only. After it is read, the president asks if there are any questions. After questions have been answered, or if there are none, the president says, "The Treasurer's report is

placed on file (or is referred for audit)." The president and secretary each should receive a copy of the report.

The treasurer's books should be audited, at least annually, and it is the auditor's report that is adopted. This shows that your accounts are correct. Adoption of the auditor's report relieves a treasurer of responsibility for a period covered by the report except in the case of fraud.

When the treasurer handles large sums of money, it is prudent and customary to have the office bonded for a sum sufficient to protect the association from loss.

A *fiscal year* is an accounting period of 12 consecutive months. If it is other than the calendar year (January through December) the period it covers must be specifically designated in your bylaws and on the membership information.



JOB DESCRIPTION...VICE PRESIDENT, PUBLICATIONS

In general, a Vice President of Publications may be expected to:

1. Attend board meetings and association meetings/events and provide current report of membership records at each board meeting.
2. Develop and oversee affiliate publications, membership brochures

and other publications of the affiliate.

3. Compile, publish and distribute the official association newsletter.
4. Serve as Chairman of the Publications Committee.
5. Work closely with the executive board and membership committee to

publicize and promote the association throughout the area.

6. Assist with any publication needs for workshops or conferences, including registration brochures, flyers, announcements, meal tickets, etc.
7. Maintain and complete a procedure book for their successor.

JOB DESCRIPTION...VICE PRESIDENT, IN-SERVICE/PROGRAMS

In general, a Vice President of In-service/Programs may be expected to:

1. Attend board meetings and association meetings/events and give reports as necessary.
2. Work closely with committee chairman in planning association workshops, conferences and events.
3. Serve as advisor to the Professional Standards Program (PSP) Committee.

4. Promote seminars, symposiums, professional growth days, educational classes or online training programs for the association's members.
5. Develop library of speakers and presenters to be used by the association in future workshops and conferences.
6. Develop a marketing tool to promote the association's mission and goals.

7. Develop a brochure to distribute to school/district administration, and post on the website, regarding in-service programs available to educational institutions in their area.
8. Assume responsibility for setup of rooms, creation of speaker introductions, and coordination of AV needs for all association activities.
9. Maintain and complete procedure guidelines for successor.



"AUTHOR MARK HOULAHAN ONCE STATED, 'IF YOU WANT YOUR LIFE TO BE A MAGNIFICENT STORY, THEN BEGIN BY REALIZING THAT YOU ARE THE AUTHOR AND EVERY DAY YOU HAVE THE OPPORTUNITY TO WRITE A NEW PAGE.' MY VERSION OF THAT QUOTE IS: 'EVERY DAY WE HAVE CHOICES TO MAKE, THANKFULLY OPPORTUNITIES THE NEXT DAY TO CORRECT ANY OF THE LESS THAN PERFECT ONES.'"

LINDA TRIBBLE, CEOE, NAEOP PAST PRESIDENT (KENTUCKY)

JOB DESCRIPTION...VICE PRESIDENT, MEMBERSHIP

In general, a Vice President of Membership may be expected to:

1. Attend board meetings and association meetings/events and provide current report of membership records at each board meeting.
2. Maintain a master list of all members, both current and inactive, in all membership categories.
3. Provide electronic copy of membership or labels upon request from other board members.
4. Actively promote the increase and retention of membership in the association.
5. Develop a membership card complete with the association's logo for members indicating year of membership and name of member.
6. Receive membership applications and payments, and forward payments to treasurer after recording payment on membership list.
7. Serve as chairman of the Membership Committee (if in existence).
8. Maintain and complete a procedure book for their successor.

Helpful Information for the Vice President of Membership

Next to the president, you are one of the most valuable persons to the association. Begin your promotion for building membership with the realization that membership is vital to your association.

Communication is the most important word in membership. The membership chairman needs to keep in contact with the members. As long as the communication line is kept open and busy, membership should grow, but let the line break down and your membership will suffer.

Let each member feel she/he is part of the organization. Don't just take dues and let it go at that. Keep in touch throughout the entire year. Interest will make members join year after year.

Make every effort to contact every eligible person. Welcome the new employee, explain the association and issue an invitation to join. Always remember the

needs of your renewing members. Never let a member feel you want dues only. Let them know you need them. It's only human nature to ask, "What do I get out of this?" Give reasons and have answers to their questions.

Stay current in your communication with your members. This is especially important as you prepare articles for your newsletters.

Good programs are important to maintaining good membership numbers and attendance at events. Offer a variety of programs, such as in-service workshops, programs about personal appearance and health, programs about personal protection, etc. Have something that will be of interest to your membership.

Promptness is important in promoting membership. Be prompt in each aspect of your membership promotion. Send

membership cards promptly; answer correspondence promptly; send materials promptly. This is so important to members.

Listen to your members for the benefits they are looking for in an association.

Promote your association through your members. Ensure that your members understand the benefits of belonging, the personal and professional benefits for each member, along with the values of increasing recognition of educational office professionals.

Don't miss opportunities to promote your association—watch for those opportunities in all-staff meetings, back to school meetings, and local events with your local school administrators groups.



Note: Board positions in the areas of in-service/programs, membership and publications may be under the responsibility of a chairman, rather than an elected position. For more information on committee chairmen, please see pages 16-19 of this booklet.

Scholarship Chairman

The Scholarship Chairman shall:

1. Attend Board and association meetings and give progress reports as necessary.
2. Have general charge of promoting the association’s scholarship program, including mailing applications and cover letters to high schools and association members.
3. Develop and promote fund raising program to raise funds for scholarships.
4. Promote the association’s re-entry scholarship (if in existence) among association members.
5. Submit the annual scholarship application to the association’s website chairman for posting on website, including application

requirements, timelines and due dates.

6. Award annual scholarship (s) as provided for in the annual budget.
7. Notify both successful and unsuccessful scholarship applicants in writing.
8. Notify successful applicant’s college of scholarship award.
9. Submit successful candidates to the National Association of Educational Office Professionals annual scholarship contest.



YOU NEVER KNOW

YOU NEVER KNOW WHEN SOMEONE MAY CATCH A DREAM FROM YOU.

YOU NEVER KNOW WHEN A LITTLE WORD OR SOMETHING YOU MAY DO MAY OPEN UP THE WINDOWS OF A MIND THAT SEALS A LIGHT.

THE WAY YOU LOVE, MAY NOT MATTER AT ALL, BUT YOU NEVER KNOW IT MIGHT.

AND JUST IN CASE IT COULD BE THAT ANOTHER’S LIFE, THROUGH YOU MIGHT POSSIBLY CHANGE FOR THE BETTER, WITH A BROADER AND BRIGHTER VIEW.

IT SEEMS IT MIGHT BE WORTH A TRY AT POINTING THE WAY TO THE RIGHT. OF COURSE IT MAY NOT MATTER AT ALL, BUT THEN AGAIN IT MIGHT.

WRITTEN BY

HELEN L. MARSHALL

Website Chairman

The Website Chairman shall:

1. Attend Board and association meetings and give progress reports as necessary.
2. Have general charge of promoting the association’s website, including responsibility for the development, maintenance and updating of the website in a timely manner.
3. Actively seek information from executive board members and committee chairmen.
4. Promote the association’s website as the main communication link for executive board, current members and potential members.

5. Maintain a calendar of events on website.
6. Provide location for benefits of membership on website.
7. Submit application to the National Association of Educational Office Professionals for the annual website award.
8. Maintain a procedure book for successor.

Finance/Budget Chairman

The Finance/Budget Chairman shall:

1. Attend Board and association meetings and give progress reports as necessary.
2. Have general charge of budgeting of the finances of the association.
3. Receive all requests for payment from the association and approve for payment through association treasurer no later than forty-five (45) days after service is incurred or invoice is rendered.

4. Prepare and submit a proposed annual budget to the executive board for review and subsequent approval, and then to the membership at the annual business meeting for review and approval.
5. Prepare a quarterly report for each executive board meeting showing expenditures and balances in each budget category.
6. Maintain a procedure book for successor.



Ways and Means Committee Chairman

The Ways and Means Committee Chairman shall:

1. Attend Board and association meetings and give progress reports as necessary.
2. Develop fund raising ideas to cover the various expenses of the association, including scholarships, leadership training, awards, etc.
3. Present fund raising proposals to the executive board for review and approval annually.
4. Report on success of fund raising to membership at annual business meeting.
5. Promote fund raising activities through association’s website, newsletter and various other forms of communication.
6. Maintain and complete a procedure book for successor.

Professional Standards Program Chairman



The Professionals Standards Program (PSP) Chairman shall:

1. Attend Board and association meetings and give progress reports as necessary.
2. Actively promote the PSP program to association members through newsletter articles, information on the association’s website and other forms of communication.
3. Review applications to confirm participation and attendance at association activities.
4. Recognize PSP certificate and CEOE recipients by a letter of congratulations and recognition in the association’s newsletter.
5. Maintain a procedure book for successor.

“DO NOT WAIT; THE TIME WILL NEVER BE ‘JUST RIGHT’. START WHERE YOU STAND, AND WORK WITH WHATEVER TOOLS YOU MAY HAVE AT YOUR COMMAND, AND BETTER TOOLS WILL BE FOUND AS YOU GO ALONG.”

NAPOLEON HILL



Other Positions Appointed by Association President

In addition to the various association chairmen, the association president may appoint other positions, including:

Parliamentarian

The Parliamentarian shall ensure that the business of the Association is conducted in compliance with the Bylaws of the association and with *Robert’s Rules of Order, Revised*. The association’s Bylaws and Standing Rules publications shall be maintained by the Parliamentarian, unless otherwise directed by the president. The Parliamentarian shall serve on the Nominating Committee.

Historian

The association’s Historian shall maintain a pictorial and narrative history of the Association.

Workshop/Annual Conference Chairman

The association president may ask a member to serve as chairman of a special event, workshop or annual conference. This chair position will work closely with the Vice President of Programs/Program Chairman to plan and carry out the responsibilities associated with a successful event, and may include a variety of titles from Vice President, to Committee Chairman, to Director.

“AS A PAST PRESIDENT OF MY AFFILIATE, I LEARNED THAT PAST PRESIDENTS ARE LOOKED TO FOR ADVICE AND HISTORY OF THE ASSOCIATION. IT ALSO OFFERS A DIFFERENT PERSPECTIVE WHICH GIVES THE MEMBER MORE INFORMATION ABOUT DECISIONS AFFECTING THE ASSOCIATION.”

LISA MOREHOUSE, CEOE

COMMITTEES

What makes a committee?

Robert's Rules of Order, Newly Revised defines a committee as “A body of one or more persons, elected or appointed by (or by direction of) an assembly or society, to consider, investigate, or take action on certain matters or subjects, or to do all of these things.”

What are the responsibilities? How does a committee function? Committee members are appointed most generally because they have special knowledge and ability to carry out the committee’s

assignment. Committee members typically are also reliable, hardworking, tactful, and prompt in discharging their responsibilities. To make certain of a committee’s purpose and responsibilities, the committee chairman should provide a copy of the association’s bylaws or the motion which provided for the creation of the committee to each member. An understanding of parliamentary procedure will also help members to be good committee members.

Kinds of Committees.....Standing vs. Special

“I LEARNED SO MUCH FROM MY PARTICIPATION IN THE COMMUNITY SERVICE COMMITTEE OF MY AFFILIATE BECAUSE I WAS ABLE TO NETWORK WITH THE AGENCIES WHO WE RAISE THE FUNDS FOR AND PARTICIPATE IN PROJECTS WITH THEM.”
 MELISSA CARPENTER,
 CEOE (MISSISSIPPI)

There are two kinds of small or “ordinary” committees: standing and special.

FACTS TO KNOW ABOUT STANDING COMMITTEES:

1. Standing committees are relatively permanent in nature with members appointed or elected to carry out specific functions of the organization.
2. Committee members are usually selected after new officers have been elected and serve for a term corresponding to that of the officers or until their successors have been chosen.
3. Membership of the committee may change, but the committee itself continues to exist as a part of the organization until a change in organization rules eliminates it.
4. Authorization for the creation or appointment of standing committees is customarily provided in the bylaws of the organization.
5. Members of a standing committee should be chosen to provide the strongest possible groups to carry out the responsibilities of the committee.

6. Bylaws frequently provide that chairmen shall be members of the association’s executive board.
7. The committee may be required at times to report to the executive board as well as, or instead of, to the assembly. Committees usually report at least once a year, generally at the annual meeting of the organization.
8. Examples of standing committees found in many organizations include, but are not limited to: Finance, Membership, Program, Public Relations, Budget.

FACTS TO KNOW ABOUT SPECIAL COMMITTEES:

1. Special committees are created as the need arises to carry out a specified task.
2. Committee members are elected or appointed to carry out a specific duty and remain on the committee until that task is completed.
3. When the committee has completed its assigned responsibility and given its final report, the committee automatically ceases to exist.
4. Special committees are appointed or elected as

5. Members of special committees should be chosen so as to best meet the needs of the committee: If it is to take some kind of action, the committee should be small and include only those who favor the work to be undertaken. If it is to study or investigate a question, it should be larger and include members with different points of view on the assigned subject.
6. Chairmen are usually not members of the organization’s Executive Board.
7. A special committee normally reports to the body that created it. If created by the membership, it reports to the membership. If created by the executive board, it reports to the board. The motion creating it can direct to whom the committee reports.
8. An example of a special committees might be one organized to study the possibilities of a new project or idea, to investigate a situation, to carry out a particular action for the organization.





RULES UNDER WHICH COMMITTEES WORK

1. The chairman is appointed by the president, elected by the membership or elected by members of the committee.
2. If no chairman is appointed or elected, the first person named to the committee calls a meeting. Committee members then elect a chairman.
3. When the president appoints a committee, the person named first becomes chairman.
4. All members must be notified of all meetings.
5. A majority of committee members must be present to make a committee meeting legal. This is the “quorum” of the committee.
6. The president is an ex-officio member of committees only when the bylaws provide for this. An ex-officio member has all the rights and privileges of other members, including that of receiving notices of meetings.
7. Discussion of committee business is informal. All members, including the chairman, may debate freely.
8. Committee decisions are made by a majority of those present and voting in a meeting of the committee, a quorum being present. Emergency decisions made by telephone must be approved by all committee members.
9. A committee has the power to do only that which is authorized by rules or motions adopted by the organization.
10. Committees may hold “hearings” during which other members of the organization may present their view; however, during actual deliberation and discussion by the committee, only committee members may be present.
11. All papers or documents referred to a committee by the organization must be returned to the organization (usually the secretary) in the same condition as when received.
12. Before a committee’s final report is presented on a certain issue, any member who did not vote on the losing side of that particular question (and this includes absentees) may vote that the vote be reconsidered. A two-thirds vote is required unless all who voted on the prevailing side are present or have had ample and complete notice of the member’s intention to move the reconsideration, in which case, only a majority vote is required.
13. When a member is not able to serve or resigns from a committee, the vacancy is filled by the same person or body that selected the original members of the committee or as provided by the bylaws.



Committee Chairman

- Arranges for meetings of the committee. If the chairman fails to call for a meeting, any two members may call a meeting provided all members, including the chairman, are notified.
- Acts as secretary, keeping notes of committee business and progress. In large committees, a member may be appointed as secretary to keep informal notes for the committee’s reference.
- Presides over committee meetings and participates actively in the discussion.
- May make motions, debate, and vote on all questions.
- Prepares and gives the report for the committee. Although the chairman usually gives the report, the committee may select a “reporting member.”

BUSINESS IS CONDUCTED INFORMALLY IN COMMITTEES

Members need not “obtain the floor” before making motions or speaking. A second is not needed to a motion made in committee meetings. The chairman may participate in debate without rising or leaving the chair. There is no limit on the number of times, or the length of time a member may speak on a question. A motion to close debate (to move the previous question) is seldom permitted. Subjects are often discussed informally before as well as after a motion is made. A show of hands or general consent is used frequently as the method of voting.

MINORITY REPORTS

In all committees, members of the committee who do not agree with the report adopted by the committee may prepare their own report. This is called a “Minority Report.” The report adopted by the majority is called the “Committee Report” or the “Report of the Committee.”

The assembly has the right to decide whether it will hear a minority report. If the assembly decide to hear it, a motion may then be made that the minority report be substituted for the report of the committee.

If this motion is adopted, the assembly must then decide whether it will approve the recommendations in the minority report.



NEWSLETTER DESIGNING

Newsletters have become an essential component in our goals to communicate with our members, whether it be our local or state affiliates, or NAEOP. When creating the newsletter, one critical fact stands out. You want the recipient of your newsletter to want to read the articles and announcements that you have included. And we all know newsletters have many purposes, including giving information about the association to the member, announcing critical timelines and sharing information about past and upcoming events. And we all want our newsletters to stand out in the crowd and be read.

The first guideline is to *make it useful*. If you don't give them some kind of actionable "aha" with every issue you send, it's difficult to get any traction with readers, reports Mr. Katz. "Your goal, therefore, is to give them pause. "Useful information rises to the top of the pile, and when your newsletter is on top, you need not worry about how big the pile is." The second guideline is to *make it interesting*. The article gives value to personal anecdotes, conversational language and the occasional joke here and there. "They probably won't read it just because it's interesting, but they certainly won't read it if it's not."

Many times we think of a newsletter as paragraph after paragraph of reports—boring! Sometimes the best way to communicate information is to give "nuggets" of insights or tips that readers can take in, understand and hopefully remember long enough to put into practice.

"Give your readers something small enough to understand and remember."



Make it authentic is the third guideline. Done right, newsletters are the voice of our association. It reflects our culture, our personality, our members, our goals, our mission, our history and our future. "Marketing is the opposite of fitting in—do yourself a favor and fit out." Other useful information on designing newsletters includes remembering that *your newsletter should be designed first for your readers*. Consistency in the design of your newsletter is critical and free space should be used wisely. Spend the time critiquing the layout as much as you do proofing the text in the articles. And, while we're on the subject—please don't forget to proof-read your articles beyond the spell check provided by your word processing program. Try to look at the design and ask yourself if you received the newsletter, would it attract you enough to read the articles.

Be sure to *brand your association by including your association's identifiers on both the first and last page*. Don't clutter every page with images, text, graphics and "small print". White space is good, and gives sense and order to the content. Lastly, pay attention to the fonts you use—sometimes pretty fonts are just that—pretty, but they don't provide for easy reading and clear communication of your message.

WORKSHOP PRESENTERS ARE JUST A CLICK AWAY

Many resources are available to you as a new affiliate in terms of workshop presenters. Each member of the Board of Directors, past presidents and former board members all have workshops available to you as an affiliate member of NAEOP. Be sure to check the NAEOP website (www.naeop.org) for additional information.

If your affiliate is able to pay for the cost of field service, it is appreciated. If not, a contribution to the NAEOP Field Service Program is required.

To request a speaker, simply complete the Field Service Reporting Form and submit it to the NAEOP Professional Development Chairman at the following address:

NAEOP Professional Development Chairman
P. O. Box 12619
Wichita, KS 67277-2619

Listed below are a sampling of workshops offered through the NAEOP Field Service Program:

212 Degrees—Imagine the Possibilities

Getting Out of Your Own Way

Tips for Public Speaking

School Secretary Survival

Explore Your Talents and Let Your Light Shine

The PSP Puzzle

Professionalism in the Workplace

Hey! We're Different But the Same!

The Nuts and Bolts of Good Telephone Etiquette in the Workplace

Connecting with the C's in Success: Communication, Change and Culture

When Generations Collide

No matter the topic, the NAEOP members stand ready to serve.

More Helpful Information.....

DOES PUBLIC SPEAKING MAKE YOU JITTERY?

Try these steps to control presentation anxiety. Although most people can get by without ever being called to stand in the spotlight, others are routinely asked to make presentations. For those who suffer from presentation anxiety, this can bring on full-fledged panic attacks marked by shortness of breath, tight muscles, indigestion, reduced blood flow to the extremities, increased heart rate, and increased secretion of stress hormones, which raise blood sugar and suppress the immune system. Fortunately, it is possible to overcome such fears—or at least quiet the symptoms. Try these suggestions by being prepared—you’ll be less likely to panic if you know you’ve been there, done that - even if its only in practice:

- Study your material and practice your presentation until it becomes second nature.
- Visualize a successful presentation.
- Arrive early and familiarize yourself with your surroundings. Walk from your seat to the stage, stand at the podium, speak into the microphone.
- Get to know some audience members as they arrive. It’s easier to speak to friends than strangers.
- Don’t apologize for being nervous. Most people won’t realize you’re nervous—unless you mention it.
- Focus on your message, not the medium. Concentrate on getting your point across rather than the fact that you’re making a speech.
- Gain confidence. The more time you spend in front of an audience, the more at ease you’ll be.

Most important, realize that your audience genuinely wants you to succeed. ...They’re not the enemy, they’re on your side.

Adapted from “Presentation anxiety: Fear that keeps you from Moving ahead.” by L. John Mason, on the Stress Education Center Website; and, “Overcoming speaking anxiety in meetings and presentations,” by Lenny Laskowski, on the L.J.L. Seminars Website; and referenced from www.managebetter.biz

Sample Request for Payment

REQUEST FOR PAYMENT		
_____ Association of Educational Office Professionals		
I/We hereby request payment for the following:		
Pay to: _____	Amount: \$ _____	Date: _____
Purpose of expenditure: _____		

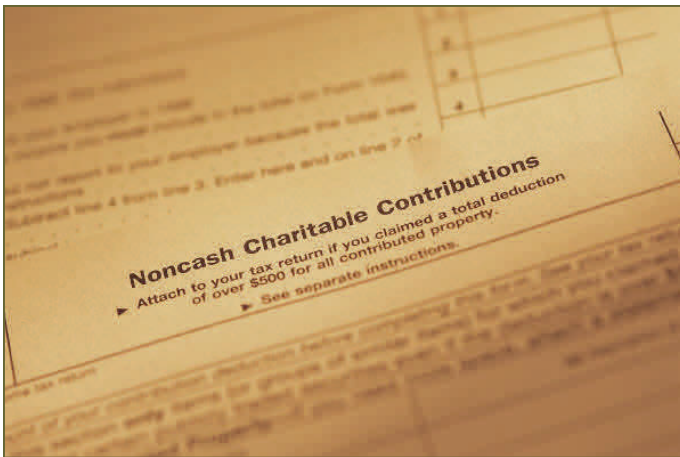
Charge to following budget category: _____		
[<input type="checkbox"/>] Invoice is attached		
Submitted by: _____		Date: _____
Approvals:		
Finance/Budget Chairman: _____		Date: _____
President: _____		Date: _____
+++!Bttpdjbu jpo!Usfbtvsfs!Vtf!Pomz!+++!		
DATE PAID: _____	AMOUNT PAID: _____	CHECK #: _____

EXEMPT FROM TAXES.....TO BE OR NOT TO BE

When a new association is formed, there are always guidelines that should be followed to comply with Internal Revenue rules and regulations. Because each state can vary in their regulations, it would be in the best interest of the group to speak with an individual knowledgeable in this area.

While there are benefits for an association to affiliate with NAEOP, a tax exemption is not one of them. In order for NAEOP and all its affiliates to be covered under a blanket exemption, there is paperwork and cost involved.

Below is a brief explanation of the increased expense, administrative matters and risk that would be added to NAEOP.



Expense

For a blanket tax-exempt letter, a new form 1023 would be required. The estimated cost would be \$2,500. The IRS also charges a user fee for this form; approximately \$750.

If this blanket exemption were implemented, the CPA performing the annual review and preparing the annual form 990 for NAEOP would increase their fees substantially. A potential increase of 500% would be possible dependent upon how many states and localities are included. Additionally, the organization's present CPA firm would not be allowed to assist in a substantial manner and perform the review. An additional CPA firm would be required for one of the engagements.

The dramatic increase in record keeping requirements would require the hiring of at least one part time individual. This could cost the organization another \$10,000 annually plus related payroll taxes.

Administrative matters

The initial research would be very time consuming as each state and locality involved would have to be contacted to determine the appropriate laws. In the future, each state and locality would be monitored for any changes in the appropriate laws.

Periodic statements and reports for each affiliate would be required to be filed with NAEOP for inclusion in the consolidated reports. NAEOP must have documentation from **each** affiliate. Presently, an organization raising less than \$25,000 only has to file a postcard with the IRS and has no other requirements.

If this blanket exemption was implemented, all affiliates (whether state or local) would give NAEOP total power and authority to approve or disapprove of all activities, policies and rules.

Risk

NAEOP would take sole responsibility for each state and local affiliate. Each state and local affiliate would report virtually everything to NAEOP for reporting to IRS and for review.

All states and local affiliates would be required to keep all activities in line with NAEOP. Any state or local affiliate could become disassociated by not following the NAEOP mission. NAEOP itself is not tax exempt, however the NAEOP Foundation is and its tax status could be jeopardized by any single state or local affiliate's activities if deemed inappropriate by the IRS.

To summarize, many state groups and local affiliates, which do not raise \$25,000, would lose their independence and decision making capabilities. In addition, the larger affiliates would probably not like answering to the NAEOP Board for each event planned.

Based on the information that was supplied to us by a Certified Public Accountant, the blanket tax exempt procedures will not be implemented.





SIX IMPORTANT FACTS TO KNOW ABOUT THE TAX TREATMENT OF TAX-EXEMPT ORGANIZATIONS

IRS TAX TIP #2010-60

Every year, millions of taxpayers donate money to charitable organizations. The IRS has put together the following list of six things you should know about the tax treatment of tax-exempt organizations.

Annual returns are made available to the public. Exempt organizations generally must make their annual returns available for public inspection. This also includes the organization's application for exemption. In addition, an organization exempt under 501(c)(3) must make available any Form 990-T, *Exempt Organization Business Income Tax Return*. These documents must be made available to any individual who requests them, and must be made available immediately when the request is made in person. If the request is made in writing, an organization has 30 days to provide a copy of the information, unless it makes the information widely available.

Donor lists generally are not public information. The list of donors filed with Form 990, *Return of Organization Exempt From Income Tax*, is specifically excluded from the information required to be made available for public inspection by the exempt

organization. There is an exception, private foundations and political organizations must make their donor list available to the public.

How to find tax-exempt organizations. The easiest way to find out whether an organization is qualified to receive deductible contributions is to ask them. You can ask to see an organization's exemption letter, which states the Code section that describes the organization and whether contributions made to the organization are deductible. You can also search for organizations qualified to accept deductible contributions in IRS Publication 78, *Cumulative List of Organizations* and its Addendum, available at IRS.gov. Taxpayers can also confirm an organization's status by calling the IRS at 877-829-5000.

Which organizations may accept charitable contributions. Not all exempt organizations are eligible to receive tax-deductible charitable contributions. Organizations that are eligible to receive deductible contributions include most charities described in section 501(c)(3) of the

Internal Revenue Code and, in some circumstances, fraternal organizations described in section 501(c)(8) or section 501(c)(10), cemetery companies described in section 501(c)(13), volunteer fire departments described in section 501(c)(4), and veterans organizations described in section 501(c)(4) or 501(c)(19).

Requirement for organizations not able to accept deductible contributions. If an exempt organization is ineligible to receive tax-deductible contributions, it must disclose that fact when soliciting contributions.

How to report inappropriate activities by an exempt organization. If you believe that the activities or operations of a tax-exempt organization are inconsistent with its tax-exempt status, you may file a complaint with the Exempt Organizations Examination Division by completing Form 13909, *Tax-Exempt Organization Complaint (Referral) Form*. The complaint should contain all relevant facts concerning the alleged violation of tax law. Form 13909 is available at IRS.gov or by calling 800-TAX-FORM (800-829-3676).

Fiduciary Relationship and Responsibility

The members of the board of directors and each chairman of the association have a fiduciary relationship with the members of the association. This fiduciary relationship imposes obligations of trust and confidence in favor of the association and its members. It requires the members of the board to act in good faith and in the best interest of the members of the association. It means that board members must exercise due care and diligence when acting for the membership, and it requires them to act within the scope of their authority. The fact that members of the board are volunteers and unpaid does not relieve them from the high standards of trust and responsibility. Board members cannot be excused from improper action on the grounds of ignorance or inexperience and liability of board members for negligence and mismanagement exists in favor of the association and its members.



**NATIONAL ASSOCIATION OF
EDUCATIONAL OFFICE PROFESSIONALS**

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