

AIA CORE MEMBER SERVICES

Providing a Valuable and Consistent Experience for All Members

AIA ADVANCEMENT STATEMENT

Together we agree that the time is now to change the way we think and behave in order to become a more valued, relevant profession. The AIA will focus its priorities to elevate public awareness, advocate for the profession and expand and share knowledge. Bold, visionary leadership is urgently needed to ensure a prosperous future and to inspire architects to create a better world for all people—through architecture. [Adopted by AIA Board of Directors, 2013]

On the following pages are the Core Member Services that the AIA commits to provide to its members, although many components exceed these basics. Each section outlines a core member service, followed by specific responsibilities of AIA National and of the component(s) in your state. Where state or local laws require a higher standard of care than is reflected in the minimum Core Member Services specified below, please observe the law in your jurisdiction.

I. Member Communications

**Promote value of
AIA membership**

- IA) National: Promote value of AIA membership. Provide advertising resources (copy and graphics) to enable components to promote AIA products and services that members value. These include Contract Documents, Career Center, annual Convention, AIA University (AIAU), and others as appropriate.

**Promote AIA resources
to members**

Components: Provide regular, visible promotion of these AIA products in component communications (electronic and print). (Some revenues from these products and services are shared with components through the component resource allocation model.) *[Documentation: Provide samples of such advertising placement in component communications.]*

Support AIA brand

- IB) National: Maintain aia.org web domain and website, with resources for members, components, industry and the public. Develop a digital distribution platform that can integrate state and local component content, to provide a seamless member experience.

Components: Contribute content to the new AIA digital platform (anticipated in 2015-2016), to provide a seamless member experience. *[Documentation: None needed. National will verify.]*

- IC) National: Create and follow AIA brand guidelines for use in print and digital media.

Components: Follow AIA brand guidelines in print and electronic media. (New brand guidelines are anticipated in 2015). *[Documentation: Provide a copy or screenshot as applicable of key publications, including website home page, business card, letterhead, and a printed publication, if any.]*

2. Education

Collaborate statewide to ensure access to 18 credits per year of continuing education

Ensure quality continuing education

Offer IDP support, ARE preparation and other resources to emerging professionals in pursuit of licensure and career development

Maintain member CES transcripts

Offer any AIA member, regardless of assigned component, a reasonable opportunity to participate in component Continuing Education programming

- 2A) National: Maintain CES Discovery to store course records and member transcripts. Set CES Provider standards and maintain quality assurance program. Train CES Providers. Maintain the AIAU digital CE course delivery platform.

Components: Offer at least 18 CES credit hours annually, of which at least 12 are Health/Safety/Welfare (HSW). Each component participating as a CES Provider will comply with requirements outlined in the CES Provider Manual.

[Documentation: None needed. AIA National will verify.]

- 2B) National: Provide IDP and ARE resources to support emerging professionals in pursuit of career development and licensure.

Components: Provide career information and mentoring events for emerging professionals. State component appoints and maintains contact with the state Architect Licensing Advisor.

[Documentation: Provide samples of component communications describing IDP, ARE, and career or mentoring activities.]

IDP - Intern Development Program

ARE - Architectural Registration Examination

CES - Continuing Education System

3. Advocate

Advance AIA legislative priorities

Engage regulatory entities

Empower members to advocate for themselves and their profession

- 3A) National: Develop the AIA national advocacy agenda. Work with state components to advance legislative priorities and identify emerging issues.

State Components: Develop a state legislative agenda aligned with the AIA Public Policies and Position Statements. Share that agenda and critical legislation with AIA National and with local components. [Documentation: State components provide a copy of the legislative agenda.]

- 3B) National: Share legislative resources (tools, data and advocacy training) to assist state components with securing positive legislative outcomes.

State Components: Devise an advocacy strategy that works within the state's legal and political framework. [Documentation: State components provide a summary of the state advocacy strategy.]

- 3C) National: Craft and execute federal legislative and regulatory strategy by engaging with Congress and key federal agencies on national issues.

State Components: Advocate to the state's legislature, licensing boards, procurement agencies, and other officials. [Documentation: Provide a summary of progress made to advance the state legislative agenda.]

Local Components: Engage with local government agencies, decision makers and building officials. [Documentation: Provide a summary of these engagement activities.]

4. Elevate Public Awareness

Promote public awareness of the value of design and the role of architects

Recognize members' design excellence

Engage with local community

- 4A) National: Provide an integrated public awareness campaign, including media outreach, publishing, advertising, collateral and tools for State and Local use.

Components: Use and/or adapt public awareness campaign materials in communications to the public. *[Documentation: Describe your public awareness outreach efforts and how you used these campaign materials.]*

- 4B) National: Nationally recognize member projects and exemplary service.

Components: Recognize and publicize outstanding member projects and exemplary service. *[Documentation: Provide a copy of an awards program call for entry.]*

- 4C) National: Work with AIA Foundation to coordinate public engagement via communications and programs.

Components: Engage the public via communications and programs. *[Documentation: Provide examples of media outreach and/or coverage of the component's activities. Describe key public outreach projects or programming and the target audience.]*

5. Governance

Comply with federal and state laws

Mitigate risk

Keep local, state and national strategic plans up to date and aligned

Develop visionary leaders to serve at local, state and national levels; participate in leadership conference

- 5A) National: Adhere to federal requirements to adopt and maintain written policies regarding records retention/destruction and whistleblower protection. Adhere to IRS guidelines and/or best practices to: a) maintain minutes for the board and any committees authorized to act on behalf of the board, and b) adopt and maintain written policies concerning conflicts of interest, board review of executive director/CEO compensation and benefits, gift acceptance and joint ventures and partnerships.

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- 5B) National: Keep open communications channels to inform component leadership of news and resources they need to execute their duties.

Components: Report names of upcoming year's officers to AIA Component Collaboration & Resources by December 31. *[Documentation: None needed. AIA National will verify.]*

- 5C) National: Comply with state filing requirements for non-profit organizations.

Components: Comply with state filing requirements for non-profit organizations. *[Documentation: Affirm that your component is currently in compliance with your state's filing requirements for non-profit organizations.]*

5. Governance

- 5D) National: Maintain AIA Model Bylaws. Review components' bylaws changes to ensure they are consistent with Institute Bylaws.

Components: Use AIA Model Bylaws as a guide to shape or update bylaws. Submit bylaws to AIA General Counsel for review as they are created or amended. Recommended: Review bylaws annually to ensure they are in accordance with Institute Bylaws as they are amended at AIA Annual Business Meeting. *[Documentation: Provide a copy of current bylaws, including date of adoption.]*

- 5E) National: Adhere to AIA's anti-trust policy.

Components: Adhere to AIA's anti-trust policy. *[Documentation: Provide examples of how your component complies with and reminds members about the AIA's anti-trust compliance policy in your meetings and other activities.]*

- 5F) National: Maintain directors & officers and general liability insurance for Institute.

Components: Maintain directors & officers insurance and general liability insurance for component. *[Documentation: Provide a page from the current policy showing summary of coverages and policy period.]*

- 5G) National: Share the Institute's strategic plan with components.

Components: Conduct strategic planning at least every five years, align it with the Institute's strategic plan, and share with other components in the state. *[Documentation: Provide a copy of the latest strategic plan.]*

- 5H) National: Execute a leadership conference annually. Provide complimentary registration to component executive directors and up to two elected leaders.

Components: Send executive director and up to two elected leaders (recommended: President and President-elect) to the annual leadership conference at least once every three years. *[Documentation: None needed. National will verify attendance.]*

6. Membership

Actively recruit and retain members

Maintain member records in AIA database

Engage members in fellowship/community

- 6A) National: Lead and conduct vigorous nationwide retention and recruitment efforts annually. Offer resources, training and best practices to help components strengthen membership.

Components: Conduct retention and recruitment efforts annually. Use AIA member recruitment and retention resources, as described in the Member & Component Support Resource Guide. *[Documentation: Describe your component's member recruitment and retention activities.]*

- 6B) National: Announce National dues rates for the coming year shortly after Annual Convention.

Components: Report dues rates for the coming year to AIA Member & Component Support as required by National's schedule (currently September 15). *[Documentation: None needed. National will confirm.]*

- 6C) National: Maintain centralized database to maintain member information and manage dues.

Components: Use AIA National centralized database system to maintain member dues information. *[Documentation: None needed. National will confirm.]*

- 6D) National: Welcome new members and provide regular communications. Conduct the annual Fellowship selection process.

Components: Recognize new members, newly-licensed members and new Fellows. Welcome new members to the component via communications, programming and networking events. *[Documentation: Describe the component's activities to recognize and engage new members, newly-licensed members and new Fellows.]*

- 6E) National: Conduct the Institute's annual business meeting at the National Convention.

Component: Ensure component delegates cast the component's votes at the National Convention and represent the component at the Institute's annual business meeting, or arrange for the component to be represented by proxy. *[Documentation: None needed. AIA will verify.]*

7. Finances & General Operations

Conduct secure, transparent and timely financial practices

Offer touch points (phone, website, email, etc.) to members and the public

Participate in AIA volunteer and component staff and volunteer training opportunities

- 7A) National: File IRS 990 return annually and file all tax returns required by applicable state and local jurisdictions.

Components: File IRS 990 or 990N (postcard) tax return annually and file all tax returns required by applicable state and local jurisdictions. *[Documentation: Provide a copy of the most recent IRS 990 or 990N return.]*

- 7B) National: Collect dues and distribute dues payments to components electronically.

Components: Maintain a bank account into which membership dues may be deposited electronically, and notify AIA National immediately if bank information changes. *[Documentation: None needed. AIA National will confirm that it has a working bank account number on record.]*

- 7C) National: Take reasonable steps to ensure that financial transactions are secure, to protect member financial privacy, and to guard against financial irregularities.

Components: Take reasonable steps to ensure that financial transactions are secure, to protect member financial privacy, and to guard against financial irregularities. *[Documentation: Provide a copy of the component's current policy concerning the handling of funds and member financial data.]*

- 7D) National: Provide members and the public with ready access to the Institute both online and by telephone. Provide component staff with development and training opportunities. Develop and share best practices.

Components: Provide members and the public with a dedicated point of contact for the component. Provide members with access to staff at the component or through another component within the state. *[Documentation: Provide telephone, name and contact information for the primary point of contact at the component.]*

7. Finances & General Operations

- 7E) National: Execute Council of Architectural Component Executives (CACE) Annual Meetings. Provide stipend to assist components in sending Executive Directors to attend.

Components: Send executive director to the CACE Annual Meeting at least once every three years. *[Documentation: None needed. National will verify attendance.]*

- 7F) National: Make Institute Resource Training available to new component executive directors.

Components: Send new executive directors to attend Institute Resource Training within two years of hiring. *[Documentation: None needed. National will verify attendance.]*

- 7G) National: Provide basic human resources guidelines to components.

Components: Perform regular performance reviews and salary and benefits reviews for component executive director. (Annual reviews are recommended.) *[Documentation: Provide the component's policy on reviews.]*