

Core Services Assessment



AIA
Florida

Name of Chapter: _____ **Date Submitted:** _____

This document provides that all member services (operations and programs) have been reviewed by the _____ Chapter Board of Directors (or Executive Committee), that it is fully understood that it is the Chapter's responsibility to review and document all requirements as outlined by AIA National in the materials Member Service Alignment Project.

Chapter President: _____ Signature: _____

Chapter President Elect: _____ Signature: _____

Administrative Staff: _____ Signature: _____

Person Filling Out Form: _____ Signature: _____

Position Held with Chapter: _____

Address: _____ City, State, Zip: _____

Email: _____ Phone: _____

List Any Agreements with Other Chapters

Please return no later than Monday, October 5, 2015. If you are unable to adhere to that deadline, please contact Becky Magdaleno at bwilson@aiafla.org. Thank you.



The following information should be included in your submission to AIA.

Chapter: _____ Date Submitted: _____

1. Member Communications

- A. Promote AIA Products** (*Contract Documents, AIA University, Career Center and AIA Convention*): Provide regular, visible promotions of AIA Products in component communications.

YES: If component is promoting AIA products, please provide samples of advertising.

Chapter promotes on website or newsletter (*electronic or print*)

Provide samples of advertising

NO: If your component is not promoting AIA products, please provide a copy the agreement stating that either partner chapter or AIA Florida will provide information to your component members.

Chapter unable to promote on website or newsletter (*electronic or print*)

Provide copy of agreement

- B. Contribute Content to AIA Digital Platform** (*Event dates, local articles – not specified by National. Please note that this question is currently not applicable. Once the digital platform is complete, compliance will be a core service area. Please answer this question in terms of how your component will manage this after completion of the digital platform*):

YES: If component will provide content, no documentation is required. National will verify

Chapter provides content

National will verify

NO: If your component is unable to provide content, please provide a copy of the agreement stating that either a partner chapter or AIA Florida will include with submittals.

Chapter is unable to provide content

Provide copy of agreement

- C. Follow AIA Brand Guidelines** (*In print and electronic media*): New brand guidelines have been distributed on Leaders Page.

YES: If component is following the AIA brand guidelines, please provide a screen shot of materials.

Chapter follows AIA Brand Guidelines

Provide screenshot of materials

NO: If your component is not following the AIA brand guidelines, please provide a copy of the agreement stating that AIA Florida will develop and produce a template for production (*fee based*).

Chapter unable to follow AIA Brand Guidelines

Provide copy of agreement



2. Education

- A. **Offer at Least 18 CES Credit Hours Annually / 12 HSW:** Collaborate statewide to ensure access to 18 credits per year. Ensure quality education. Offer any AIA member, regardless of assigned component, an opportunity to participate in education programs.

** Note: Suppliers of manufacturer products or other outside providers where the chapter does not have significant input do not count towards the 18 hours (may be revised by National).*

YES: If component develops and offers sessions solely, with another chapter or with AIA Florida. National will verify.

Chapter develops and offers sessions (National will verify)

- Determine the provider to maintain transcripts and other CES requirements.

Chapter partners with other chapter, AIA Florida or School of Architecture (National will verify)

- Produce programs on a risk and profit sharing basis (*written agreement*)

NO: If your component is unable to develop and/or offer sessions, please provide a copy of the agreement stating that you will partner with another chapter or AIA Florida to provide education programs.

Chapter unable to develop and/or offer sessions

- Provide copy of agreement

- B. **Provide IDP and ARE Resources:** Offer IDP support, ARE preparation and other resources to emerging professionals in pursuit of licensure and career development.

YES: If component provides career information and resources to emerging professionals, please provide a sample of component communication.

Chapter provides awareness and promotion of IDP and ARE resources, NCARB “Cloud Based” program and career services (career event with local/statewide firms)

- Provide samples of communication (*describing IDP and ARE*)

NO: If your component is unable to provide career information and resources to emerging professionals, please provide a copy of the agreement that you will partner with another chapter or AIA Florida to provide these resources.

Chapter only able to provide informational services (using NCARB and/or AIA Florida)

- Provide copy of agreement

Chapter unable to provide awareness and promotion of IDP and ARE resources

- Provide copy of agreement with partner chapter

Chapters who offer ARE program:

AIA Miami, AIA Tampa, AIA Orlando



3. Advocate

A. **Engage with Local Government Activities:** Empower members to advocate for themselves and their profession.

YES: If component meets with state legislators on local issues (building codes, historic building demolitions, main thoroughfare) and engages with local government activities, please provide a summary of activities.

Chapter meets with state legislators and engages with local government activities

Provide a summary of activities

NO: If your component does not meet with state legislators on local issues or engages with local government activities, meet with nearby chapter to discuss “regional issues” and provide meeting documentation.

Chapter does not meet with state legislators or engages with local government activities

Provide meeting documentation

Example:

- Participation by your State Director in annual AIA Florida Legislative Day in Tallahassee.
- Participation and response to AIA Florida calls to action.
- Participation in FAPAC fundraising opportunities.
- FAPAC Breakfast of Champions events.
- Meet and greet in conjunction with a chapter meeting with invited local legislative delegation.



4. Elevate Public Awareness

A. Promote Public Awareness of the Value of Design and the Role of Architects:

YES: If component promotes public awareness with the use and/or adaption of public awareness campaign materials in communications for the public, please provide a description of your efforts.

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

- Provide a description of your public awareness outreach efforts and how you used campaign materials

If component recognizes and publicizes outstanding member projects and exemplary service, please provide a copy of an awards program call for entry.

Recognize member design excellence

- Provide a copy of an awards program call for entry

If component engages the public via communications and programs, provide examples of media outreach and/or coverage and describe key public outreach projects or programming.

Engage with local community

- Provide examples of media outreach and/or coverage of component's activities. Also describe key public outreach projects or programming and target audience.

NO: If your component is unable to promote public awareness of the value of design and the role of architects, please provide a copy of an agreement stating that you will collaborate with another chapter.

Collaborate with a partner chapter

- Provide a copy of agreement

Example:

- Participation in AIA Florida's People's Choice Award through providing local press releases and resulting publicity.
- Participating in Florida Foundation for Architecture Open Door Programs
- Local engagement with media and public to elevate awareness.



5. Governance

A. **Adopt and Maintain Policies (federal requirements):** Comply with federal and state laws.

YES: If component adheres to federal requirements to adopt and maintain written policies regarding records retention/destruction; whistleblower; conflict of interest; federal filing requirements; and state filing requirements, please provide copies of policies. National will also verify.

Adopt and maintain policies

- Provide copies of policies

If component adheres to IRS guidelines to maintain minutes of the board/committees; board review of executive director/CEO compensation benefits, gift acceptances; and copies of joint ventures/partnerships, National will verify.

IRS guidelines

- National will verify

If component reports the names of upcoming officers to National by December 31st, National will verify.

Report to National

- National will verify

If component maintains directors and officers liability, please provide a copy of the D&O liability policy. National will also verify.

Maintain directors and officers liability

- Provide a copy of liability policy.

If component uses AIA model bylaws to shape or update and submits to AIA general counsel for review as they are created or amended, please provide a copy of bylaws.

Use AIA model bylaws

- Provide a copy of bylaws

If component conducts strategic planning at least every five years, is aligned with the Institute's plan and share it with other components, please provide a copy of the strategic plan.

Conduct strategic planning

- Provide a copy of strategic plan

If component executes a leadership conference annually and provides complimentary registration to component executive directors and up to two elected leaders, National will verify.

Leadership conference

- National will verify

NO: If your component is unable to adhere to federal requirements and IRS guidelines, please review the voluntary section guidelines and provide agreement that states you will become a section of another chapter or AIA Florida.

Voluntary section

- Provide a copy of agreement



6. Membership

A. Maintain Membership:

YES: If component conducts retention and recruitment efforts annually, please provide documentation that describes your component's member recruitment and retention activities.

Retention and recruitment

- Provide descriptive documentation

If component reports dues rates for the coming year as required by National's schedule. National will verify.

Report dues

- National will verify

If component uses National's centralized database system to maintain member dues information. National will verify.

Maintain member dues information

- National will verify

If component welcomes new members and provides regular communications, please provide documentation that describes the component's policies and activities to recognize and engage new members, newly licensed members and new Fellows.

Recognize newly licensed members and Fellows

- Provide descriptive documentation

If component ensures 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. National will verify.

Ensure component delegates cast votes and represent component

- National will verify

NO: If your component is unable to maintain membership, please review the voluntary section guidelines and provide agreement that states you will become a section of another chapter. Contact AIANY for assistance and possible agreement.

Voluntary section

- Provide a copy of agreement

Example:

- Use of quarterly non-member lists provided by AIA Florida.
- Provide documentation of activities devoted to new member retention efforts.



7. Finances and General Operations

A. Finances and General Operations:

YES: If component files an IRS 990 tax return annually and files all tax returns required by applicable Florida jurisdictions (i.e. annual corporate filing with the Florida Department of State Division of Corporations, please provide a copy of the most recent IRS 990.

IRS 990 tax return

- Provide a copy of most recent IRS 990

If component maintains a bank account into which membership dues may be deposited electronically and notifies AIA National immediately if bank information changes. National will verify.

Collect member dues

- National will verify

If component takes reasonable steps to ensure that financial transactions are secure, to protect member financial privacy and to guard against financial irregularities, please provide a copy of the component's current policy concerning the handling of funds and member financial data.

Secure financial transactions

- Provide a copy of current policy

If component provides members and the public with a dedicated point of contact for the component and provides members with access to staff at the component through another component with the state, please provide telephone, name and contact information for the primary point of contact.

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

- Provide contact information for primary point of contact

If component sends the executive director to the CACE Annual Meeting at least once every three years. National will verify.

Send executive director to CACE Annual Meeting

- National will verify

If component sends new executive directors to attend Institute Resource Training within two years of hiring. National will verify.

Send new executive directors to Institute Resource Training

- National will verify

If component performs regular performance reviews and salary benefits review for component executive director, please provide the component's policy on reviews.

Perform regular performance reviews

- Provide a copy of current policy

NO: If your component is unable to follow financial and general operation guidelines, please review the voluntary section guidelines and provide agreement that states you will become a section of another chapter. Contact AIA Florida for assistance and possible agreement.

Voluntary section

- Provide a copy of agreement