

AIA Michigan Survey

\*Required Question(s)

Progress:

## CORE REQUIREMENTS SURVEY FOR MICHIGAN CHAPTER COMPONENTS OF THE AMERICAN INSTITUTE OF ARCHITECTS

The first paragraph describes the AIA National Core requirements. After reading these requirements there will be a series of questions. Please answer for your chapter only. In some cases **the state component may offer some of these services for the chapter component; these services will be highlighted in blue for your information.** Each chapter component is required to meet these core requirements. There may be cases currently or in the future where the state component or another chapter component may combine to offer these services for your component. For the purposes of this survey please answer what your chapter component provides only unless directed otherwise in the survey.

Please answer to the best of your ability. In most cases when you answer yes to these questions it will need to be verified by National AIA yearly beginning December of 2015. In the paragraph descriptions below some of the information you will need to send to National AIA for component verification each year is stated.

This survey is the first step to see where we need to come together as components to make sure all chapters of the state of Michigan comply.

**Please complete by end of day April 7.**

### Component Core Requirement - Membership and Member Communications

*Actively recruit and retain members. Maintain member records in AIA database. Engage members in fellowship/community.*

- **Conduct retention and recruitment efforts annually.** Use AIA member recruitment and retention resources, as described in the Member & Component Support Resource Guide. Describe your component's member recruitment and retention activities to AIA National. (Some would still need to be done on the individual component level.
- **Report dues rates for the coming year to AIA Member & Component Support as required by National's schedule (currently September 15).** AIA National will confirm.
- **Use AIA National centralized database system to maintain member dues information.** AIA National will confirm.
- **Recognize new members, newly-licensed members and new Fellows.** Welcome new members to the component via communications, programming and networking events. Describe to AIA

National the component's activities to recognize and engage new members, newly-licensed members and new Fellows. (AIA Michigan provides some of this for chapters)

- 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. AIA National will verify.

### Member Communications

*Promote value of AIA Membership. Promote AIA resources to members. Support the AIA Brand.*

- Provide regular, visible promotion of contract documents, career center, annual convention, AIA University and any others as appropriate in component communications (electronic and print). Some revenues from these products and services are shared with components through the component resource allocation model. Provide samples to AIA National of such advertising placement in component communications.
- Contribute to the new AIA National Digital Platform - anticipated in 2015
- Follow AIA brand guidelines in print and electronic media. New guidelines are anticipated in 2015. Provide a copy or screenshot as applicable of key publications, including website home page, business card, letterhead, and a printed publication, if any.

\* 1. Does your component participate with the Institute in a centralized membership database and dues collection system?

- Yes
- No
- Unsure

\* 2. Does your component follow the Institute guidelines for use of the above system?

- Yes
- No
- Unsure

\* 3. Do you provide your members with regular opportunities to come together?

- Yes
- No
- Unsure

\* 4. Does your component communicate the benefits of AIA membership with your continuing members?

- Yes
- No
- Unsure

\* 5. Does your component welcome new members?

- Yes
- No
- Unsure

\* 6. Does your component recognize the rights and privileges of all categories of membership?

- Yes
- No
- Unsure

\* 7. Does your component recruit new members?.

- Yes
- No
- Unsure

\* 8. Does your component communicate the value of membership?

- Yes
- No
- Unsure

\* 9. Does your component promote awareness of the AIA Code of Ethics and Professional Conduct?

- Yes
- No
- Unsure

\* 10. Does your component review, recommend or nominate AIA College of Fellows candidates?

- Yes
- No
- Unsure

\* 11. Does your component have an open door policy for all AIA members? (e.g., do you provide AIA members, no matter their chapter affiliation, an opportunity to participate in your programs? (CE, Design Awards, member meetings)

- Yes
- No
- Unsure

\* 12. Does your component have in international committee/relationship or engage in international activities?

- Yes
- No
- Unsure

\* 13. Does your component produce regular communications about component activities and issues for your members?

- Yes
- No
- Unsure

\* 14. Are the following available to your members? (Select all that apply)

- Component Annual Report
- Component Financial Information
- Component Bylaws
- Board Meeting Minutes
- Leadership Contact Information

### **Elevate Public Awareness**

*Promote public awareness of the value of design and the role of architects. Recognize members' design excellence. Engage with local community.*

- Use and/or adapt AIA National public awareness campaign materials in communications to the public. Describe your public awareness outreach efforts and how you used these campaign materials.
- Recognize and publicize outstanding member projects and exemplary service. (Awards and Recognitions) Provide a copy of an awards program call for entry to National AIA

- Engage the public via communications and programs. Provide examples to AIA National of media outreach and/or coverage of the component's activities. Describe key public outreach projects or programming and the target audience.

\* 15. Does your component provide members with information about additional professional opportunities beyond the AIA?

- Yes
- No
- Unsure

\* 16. Does your component hold any type of awards program, convey an award or co-sponsor an awards program?

- Yes
- No
- Unsure

\* 17. Does your component send press releases or public announcements to the media or your community?

- Yes
- No
- Unsure

\* 18. Has your component established press and media contacts, and does it issue press releases?

- Yes
- No
- Unsure

### **Continuing Education (Knowledge & Professional Development)**

*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.*

- 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. AIA National will verify.
- Provide career information and mentoring events for emerging professionals. [State component appoints and maintains contact with the state Architect Licensing Advisor.](#)

Provide to AIA National samples of component communications describing IDP, ARE, and career or mentoring activities. [AIA Michigan provides a career mentoring program to the state and has a state-wide IDP coordinator and ARE program.](#)

- \* 19. AIA Components are automatically registered as Continuing Education System (CES) Providers. If your component provides education programs, do you follow and meet the AIA's CES requirements?
- Yes
- No
- Unsure
- \* 20. Does your component provide information to members about how to obtain their continuing education transcripts and report self-directed activities?
- Yes
- No
- Unsure
- \* 21. Does your component inform members of continuing education and professional development opportunities?
- Yes
- No
- Unsure
- \* 22. Does your component inform members of any additional continuing education opportunities offered by other approved providers to help fulfill their continuing education requirements?
- Yes
- No
- Unsure
- \* 23. Has your component established criteria for assessing programs that align with your component's goals?
- Yes
- No
- Unsure

\* 24. Has your component shared Continuing Education Programs?

- Yes
- No
- Unsure

\* 25. Has your component shared Best Practices with other components?

- Yes
- No
- Unsure

### **Advocate - Government & Community Relations**

*Advance AIA legislative priorities. Engage regulatory entities. Empower members to advocate for themselves and their profession.*

- **State** - 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. State components provide a copy of the legislative agenda to National AIA.
- **State** - Devise an advocacy strategy that works within the state's legal and political framework. State components provide a summary of the state advocacy strategy to National AIA.
- **State** - Advocate to the state's legislature, licensing boards, procurement agencies, and other officials. Provide a summary of progress made to advance the state legislative agenda to National AIA.
- **Local Components:** Engage with local government agencies, decision makers and building officials. Provide a summary of these engagement activities to National AIA.

**A State-wide committee of the AIA Michigan provides the 26-28.**

\* 26. Does your component encourage Citizen Architects and advocate for the appointment or election of an AIA member, architect or friend of the profession in your community? **Please Answer YES**

- Yes
- No

\* 27. Does your component offer a platform for issues of community importance? [Please Answer YES](#)

- Yes  
 No

\* 28. Does your component have a contract lobbyist? [Please Answer YES](#)

- Yes  
 No

\* 29. Do members of your component participate in legislative activities? (e.g., Grassroots, Day at the Legislature)

- Yes  
 No  
 Unsure

\* 30. Does your component provide the opportunity for your members to meet or otherwise liaison with elected community leaders in their community?

- Yes  
 No  
 Unsure

### **Governance, Management, and Administration**

*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.*

- 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.
- [Report names of upcoming year's officers to AIA Component Collaboration & Resources by December 31.](#)
- Comply with state filing requirements for non-profit organizations. Affirm that your component is currently in compliance with your state's filing requirements for non-profit organizations.
- 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. Provide a copy of current bylaws, including date of adoption yearly to AIA National.



- Adhere to AIA's anti-trust policy. Provide examples to AIA National of how your component complies with and reminds members about the AIA's anti-trust compliance policy in your meetings and other activities.
- [Maintain directors & officers insurance and general liability insurance for component.](#)  
Provide a page from the current policy showing summary of coverages and policy period to AIA National.
- Conduct strategic planning at least every five years, align it with the Institute's strategic plan, and share with other components in the state. Provide a copy of the latest strategic plan to AIA National
- Send executive director and up to two elected leaders (recommended: President and President-elect) to the annual leadership conference (formerly Grassroots) at least once every three years. AIA National will verify attendance.

### 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.*

- File IRS 990 or 990N (postcard) tax return annually and file all tax returns required by applicable state and local jurisdictions. Provide a copy of the most recent IRS 990 or 990N return to AIA National.
- Maintain a bank account into which membership dues may be deposited electronically, and notify AIA National immediately if bank information changes. AIA National will confirm that it has a working bank account number on record.
- Take reasonable steps to ensure that financial transactions are secure, to protect member financial privacy, and to guard against financial irregularities. Provide a copy of the component's current policy concerning the handling of funds and member financial data to AIA National.
- 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. Provide telephone, name and contact information for the primary point of contact at the component.
- Send executive director to the CACE Annual Meeting at least once every three years. National AIA will verify attendance.
- Send new executive directors to attend Institute Resource Training within two years of hiring. National AIA will verify attendance.
- Perform regular performance reviews and salary and benefits reviews for component executive director. (Annual reviews are recommended. Provide the component's policy on reviews to National AIA.

\* 31. If you are a component with assigned membership, do you maintain proof of incorporation?

- Yes
- No
- Unsure

\* 32. If incorporated, does your component comply with all federal, state, and local laws and file all required reports?

- Not Incorporated
- Incorporated and files reports
- Incorporated but does not file required reports

- \* 33. Are your component bylaws consistent with Institute bylaws?
- Yes
  - No
  - Unsure
- \* 34. If your component amended its bylaws this year, did you submit the amended bylaws to the AIA Secretary via General Counsel for approval?
- Did not amend bylaws
  - Amended bylaws and submitted for approval
  - Amended but did not submit for approval
- \* 35. Does your component file necessary reports with the IRS (e.g., Form 990) and your state, if required?
- Yes
  - No
  - Unsure
- \* 36. Do you maintain records related to your corporate and federal tax-exempt status?
- Yes
  - No
  - Unsure
- \* 37. Do you maintain a process for leadership succession and submit your list of Officers to your State Chapter?
- Yes
  - No
  - Unsure
- \* 38. Does your component select officers and board members according to your component bylaws?
- Yes
  - No
  - Unsure
- \* 39. Does your component send at least one representative to the Institute Annual Business Meeting or, at a minimum, vote by proxy?

- Yes
- No
- Unsure

\* 40. If your component is in provisional status, did you receive at least one performance assessment this past year?

- Yes
- No
- Unsure

\* 41. Do you maintain good standing as a 501(c) (6) organization?

- Yes
- No
- Unsure

\* 42. Has your component taken prudent measures to protect itself, its directors and officers and members from liability arising from its operations and activities?

- Yes
- No
- Unsure

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