

Highlights from the NAEA Affiliate Presidents Exchange Meetings (APEX) ~ May 2013

I had the pleasure of attending the NAEA Affiliate Exchange Meetings (APEX) over two days – May 9 and 10, 2013. The meetings were filled with many agenda items, but the most interesting part was the exchange of ideas among the affiliates. Several partners sponsor the APEX Meetings, this time including Fast Forward Academy, Gleim Publications, CalSurance and Quickfinder. Each sponsor makes various contributions to NAEA members and is given about 15 minutes to present a brief overview of the products and services that they have available to NAEA members. Information and details about each of these program sponsors can be found in several places on the NAEA web site and in many NAEA publications, including the E-Alert and the NAEA Journal.

The Practical Parliamentarian – Loren Kropat

During this session, which was a review of **Robert's Rules**, much information was presented with a good mix of lecture and plenty of time for lively questions and answers. For me, it was a good opportunity to get clarification on terms and procedures that we have tried to implement at NYSSEA Board Meetings. The main purpose of Parliamentary Procedure is **EFFICIENCY**.

Before a motion is made, **Informal Consideration** can be granted so that the maker of the motion can provide some rationale and background information. The Chair (President) needs to refrain from making a motion so that he/she can remain impartial.

Do you know why we have a “**second**” to a motion? It is really just to insure that more than one person wants the motion to come before the group. It does not mean that the person who seconds the motion agrees with the motion, but just that they want to let the discussion continue.

During a meeting, there are several alerts that can be made to the Chair (President). These include **Point of Order** (which lets the Chair know that procedures are not being followed or that a rule has been broken), **Parliamentary Inquiry** (when someone asks of clarification on a Parliamentary Procedure) and **Point of Privilege** (which can be personal or organizational).

Voting at a society meeting can be done in a variety of ways, including voice, hand-raising, standing, ballot, roll call or general consent (unanimous consent – used mostly for routine items).

Other items I found interesting were times when a motion is **NOT** necessary, for example, for the approval of minutes, the Treasurer's Report and the adjournment of a meeting when there is no further business.

The speaker provided attendees with a 4-page laminated Parliamentary Procedure reference guide based on the principles of Robert's Rules of Order that I will share with the NYSSEA Executive Board.

As stated above, the presentation included quite a bit of lively questions and answers. It was interesting to note that many affiliates have similar meeting procedural concerns/frustrations as we do at NYSSEA.

Public Awareness Update – Gigi Thompson Jarvis, CAE – NAEA Senior Director, Communications and Marketing

Gigi gave us an excellent update on several Public Awareness projects, including pointing out **Tools for Members** on the NAEA web site (under Membership/Member Resources). There will be a webinar coming that will give members a brief tutorial about all that is on the NAEA web site that will assist in increasing Public Awareness of EAs. Gigi emphasized that EAs need to be consistent in using the branding that NAEA has designed for members – America's Tax Expert – on all business-related materials.

Other Tools for Members available on the NAEA web site (login required) include:

- EA Newspaper Ads
- EA brochures
- Press Releases (customizable/fill-in-the-blank style)
- Client Newsletters
- Public Service Announcements
- EA Commercials for TV and movie theaters
- Radio Ads
- Logos (various formats for both NAEA and the State Affiliates)
- PowerPoint Presentations (several)

Participants of APEX shared ideas that were working/not working in their state to promote the EA Profession.

Social Media – Jackie Gellner – NAEA Marketing Manager

Jackie shared ways that NAEA is connected in efforts to reach all members and raise awareness of EAs. You can connect to NAEA through **Facebook, LinkedIn, Twitter and YouTube**. There is a PowerPoint available in the Tools for Members section of the NAEA web site (**Social Media 101**), which can be used by members to get acquainted with the various Social Media connections.

NAEA Education Update – Holli Jones Kimbrough – NAEA Director of Education & Meetings

Holli reviewed the procedures for IRS CE reporting. EAs can now see review the CE credits online at their personal PTIN site. The IRS has held several webinars and conference calls to keep affiliates and other CE providers updated on the CE program. Holli also reminded participants about the **Presentations in a Box** availability on the NAEA web site (look in State Affiliate Leadership Resources). There are currently 7 Presentations available with more coming soon. Each 2-hour presentation includes a PowerPoint presentation, speaker notes, handouts, CE forms and course evaluations.

Government Affairs – Bob Kerr – NAEA Senior Director, Government Relations

Bob gave his update in his usual lively and engaging manner. This year's Fly-In was a huge success with more than 90 EAs visiting Capital Hill on May 8, 2013. The group was briefed and presented 3 issues:

- Simplicity and Stability
- Return Preparers Oversight
- EA Credential Protection Act

Look for more details in future NAEA communications (E-Alert and/or Journal).

NAEA Forums (WebBoard) and Web Site Review – Eli Hernandez – NAEA Database Manager

Eli spent time with the affiliate group, reviewing several sections of the NAEA web site. The **WebBoard** as we know it currently is being revamped and replaced with **Forums**. Currently, both the **Forum** (in beta format) and the old **WebBoard** are available on the NAEA web site (under Membership/Member Resources) until the transition is complete.

Affiliates now have the ability to add events to the **NAEA Calendar** by completing a detailed form that is submitted electronically to and approved by Eli at NAEA (login required). *NOTE: This should be used by designated persons of each State Affiliate and NYSSEA will decide as a Board who that person will be for our event posting.*

Like any good web site, it is under constant improvement and change is inevitable. It would be a good idea for members of APEX to spend time with their home chapters so that members can get the most out of what the NAEA web site has to offer.

Other Items of Interest

The APEX meeting was smoothly and efficiently facilitated by Linda Ward, EA (Affiliate Council Chair) and Sam Matlick, CAE (NAEA Deputy Director). Starting this coming year, each Affiliate Council Member is being assigned to a State Affiliate as a means to increase communications and support throughout the year. NYSSEA leadership will work with Affiliate Council member Melissa Longmuir, EA (Washington State).

There is now a **NAEA Welcome Kit** available electronically on the NAEA web site (under Membership), which outlines the organization and benefits in a very nice online brochure.

Although a large amount of information was presented in the jam-packed days, I am happy that I had the opportunity to attend and represent NYSSEA. Feel free to contact me if you have any questions/comments.

The next APEX meeting will be held in Orlando, FL (November 7-8, 2013) in conjunction with the NAEA Board of Directors Meeting.