

Notes from the

November 2014 NAEA Affiliate President's Exchange (APEX) Meetings

Jeff Gentner, EA – NYSSEA Executive Director

I have been attending the NAEA APEX Meetings for four years now and they continue to be purposeful and inspiring. Invitees to these meetings are leaders from all affiliates of NAEA. Ann Kummer, EA, CPA (now NYSSEA President) attending these meetings, as well. The meetings were held in Orlando, FL, in conjunction with NAEA Board Meetings, NTPI and the SEE Boot Camp, so there were many opportunities to network with EAs throughout the 4 days I was there.

The APEX meetings began on Thursday afternoon and since I am also a member of the NAEA IT Focus Group, I was asked to do a presentation on the progress of our group.

NAEA IT Focus Group

In early summer 2014, after many comments and suggestions from NAEA Members about issues surrounding the current NAEA web site, an IT Focus Group was formed, including NAEA members, NAEA staff and an NAEA Board member. These members were invited based on interest, expertise and geographical location. We have been meeting almost every Wednesday via telephone conference.

The NAEA IT Focus Group serves under the direction of the NAEA President. We welcome any discussion from members as we move toward addressing concerns and recommending enhancements. We believe that we have our work cut out for us!

The purpose and goals of the NAEA IT Focus Group include:

- To review Technology Products (currently the web site) to ensure that the products function in ways affiliates/members can utilize them easily;
- Create a priority list to help NAEA Staff work on items that affect the greatest number of members

The current member of the NAEA IT Focus Group include:

NAEA Board Member: Rich Rhodes, EA (Ohio),

NAEA Staff: Bill Grutzkuhn, Director of Finance and Operations

and Connie Paradise, Director of Membership, along with

NAEA members: Aaron Blau, EA (Arizona),

Andy Stadler, EA (Indiana),

George Caesar, EA (North Carolina) and

myself, Jeff Gentner, EA (New York).

Richard Griffin, Webmaster for the Georgia Society of Enrolled Agents, was also asked to join the group based on his expertise. Richard is the husband of NAEA member, Audrey Griffin, EA.

Recently, we added Eli Hernandez, NAEA Database Manager, to our group. His presence has already made an impact since some of the changes we were recommending could be made "right before our eyes".

The IT Focus Group has had a running agenda that has included such items as:

1. Better functionality of the “Find an EA” area of the web site, including how to navigate to the correct pages, better searching criteria, cleaner, clearer instructions, more user friendly results when search for an EA and insuring accuracy of the Find an EA Google Map
2. Better, clearer instructions for updating member Profiles
3. Better utilization, organization and set-up of the web Forums
4. Better “New Member” communications

This list is modified and adjusted at almost every meeting as items move forward to completion and new items are added. As a group, we decided early on, that even though we could grow this list in many directions, it would be a better use of our time and resources if we took each item to completion before moving on to newer items.

Recently, each member of the Focus Group took a section or two of the NAEA web site and looked at it for content and format. We have reported our findings and have made comments about each section. These have been forwarded to the NAEA Staff Member directly responsible for these sections for possible updating and improvements based on our recommendations. While we realize that there may be limits on what changes can be made at this time, we feel confident that these findings will lead to a more robust experience for our members and the general public who visit the site.

Eli Hernandez, NAEA Database Manager, was invited up to share some updates and navigation of the profile area of the NAEA web site, along with a brief update on the NAEA Forums. It was interesting to me that even leaders of our affiliates are not comfortable with navigating the NAEA web site. It is the hope and goal of the IT Focus Group to make the web site experience painless and more intuitive for members and the general public, as well.

Next, I led the group into an exercise to gather information about feelings, concerns and recommendations as the IT Focus Group moves forward. We conducted a SWOT Analysis, breaking into 4 groups. A SWOT Analysis looks at Strengths, Weaknesses, Opportunities and Threats. Using the NAEA web site as our topic, the four groups worked together for about 15 minutes, listing ideas and concerns based on their given focus. These suggestions were then shared with the entire audience before collected to be summarized and given to the IT Focus Group for consideration.

I was please with this exercise and am confident that it will help guide the NAEA IT Focus Group going forward.

Mike Nelson led the next APEX session. Mike updated us with **Governance Issues and the Leadership Academy**. It was amazing how many attendees to APEX had already completed the Leadership Academy. Melissa Longmuir, EA, Affiliate Council Member spoke about the importance of each affiliate providing necessary documents to NAEA to make sure that all stay in compliance. Each Affiliate Council Member was charged with collecting bylaws, SOPs, policy and procedures and recently filed Form 990s from all NAEA affiliates. Linda Ward, EA, Affiliate Council Member spoke about the importance of each affiliate conducting a Board Orientation for new directors, as well as a set of job descriptions for affiliate leaders. She also mentioned the importance of recognizing volunteer efforts within our state and local chapters (new members, NTPI graduates) and welcoming new members (lapel pins, new member packet, personal contact, meeting invites).

On Friday morning, APEX attendees joined the NAEA Board for a breakfast, followed by a mock presentation about **Educating America**. Jean Nelson, EA, Jeff Schneider, EA and Dr. Hasselback (Gleim) played the roles to give members a glimpse of what to expect during the Educating America process. It was clear to me that anyone who gets involved with this excellent program needs to be prepared, knowledgeable and articulate. Along with the mock presentation, this time was spent discussing planning, internships and how to handle a job fair. Andy Stadler, EA, added his experience with internships (requirements, responsibilities, hiring and oversight).

Much of the afternoon was spent on **Membership**. Michelle McBride, EA, NAEA Membership Chair, updated us on what efforts have been taken to increase NAEA membership. This led to a discussion of membership recruiting and retention. Michelle explained that a “toolkit” is being put together for the purposes of Membership Recruiting and Retention. In small groups, members discussed the value of a toolkit and what components should be included. Some common components included:

- Sample letters to send to prospective members
- How-To’s for obtaining and using the NAEA member database
- Scripts for new member phone contact
- A new member packet, including compelling reasons to join (value)
- Samples of SOPs, Policy and Procedures
- The use of State lapel pins, certificates not only for new members but in recognition of active members/volunteers
- A list of member benefits
- A new member/general public page when visiting NAEA.org
- A list of group discount services offered (including Gleim, Calsurance and others)
- More information about Tax Talk Today opportunities
- Sample newspaper articles
- Better navigation of the members NAEA site

Following this discussion, another breakout session put members together for a roundtable discussion on Membership to articulate more specific needs for the Membership Committee to consider in order to maintain/increase membership. Some of the ideas mentioned included:

- Mentorship Programs for Non-EAs or EA candidates
- Increased presence at national events – Gear-Up, Job Fairs (using the new NAEA booth)
- The availability of more “Presentations in a Box”
- The use of exit surveys for non-renewing members
- Better Tax Research Tools for members (value)
- More/Better pre-termination notifications/contacts
- Better meta-tagging for the NAEA web site
- More Tax Prep and Tax Update CE (more advanced Tax Prep CE)
- Certificated Specialty CE programs
- Membership Chair Training

The Affiliate President’s Exchange (APEX) is made possible through the sponsorship of many of our partners, including Gleim, GetNetSet, Burnett and Associates and Calsurance.

I encourage anyone who is interested in collaborating with NAEA affiliates to join us at these meetings. Generally, each affiliate sends no more than 2 or 3 representatives, recommended by the affiliate president. The Affiliate President’s Exchange (APEX) meets twice annually (May and November) and also holds many phone meetings throughout the year (giving even a larger audience the opportunity to participate).