



Core Member Services

Version 4.0

December, 2024

Table of Contents

Overview	4
FAQs	7
Core Member Services	
Advocacy	9
Communications & outreach	10
Education	11
Finance & operations	12
Governance	14
Membership	16

Overview

The AIA Core Member Services (CMS) lay the groundwork for component excellence by ensuring that all members receive a consistent level of service and that each component thrives as a nonprofit corporate entity.

This fourth iteration (CMS 4.0) keeps pace with the evolution of our components, AIA, and accepted nonprofit practices. The CMS 4.0 recognizes that components have significantly improved service to members and have strengthened their business operations since the accreditation program launched in 2015. This version of the CMS rewards those achievements by giving components more flexibility in meeting some standards, removing other standards, and streamlining the submission process.

The AIA Component Engagement team is committed to providing all components with resources, training, and coaching to successfully deliver these services. Components will be examined on service delivery via the component accreditation process. Components completing the process will receive accredited status for 2026–2028.

The annual accreditation “checkup” will continue, examining a select short list of requirements critical to nonprofit business operations and services.

At its December 2024 meeting, the Board approved these changes:

General

Compared to the CMS 3.0, the CMS 4.0 will be significantly easier for components:

- Six standards were deleted.
- Six standards have more flexibility.
- Seven standards are optional. They are encouraged but no longer required.
- Two standards have been made more stringent.
- Seventeen standards are unchanged.
- International requirements are incorporated with those for all components..
- The submissions portal will generally remain open--except during the review period--to allow components to upload documentation year-round.

Advocacy & outreach

- Gives local components flexibility to use public audience outreach to demonstrate advocacy activity. Or they may continue to report local government engagement as they do now.
- Removes the requirement of international components to engage in advocacy in their host country.
- Allows state components to appoint either a staff member or a member volunteer as the state disaster coordinator.

Communications

- Makes recognition of outstanding member projects optional.

Education

- Removes the annual requirement that components deliver 18 LU / 12 HSW hours annually. However, components still must create 4 hours of learning as they do now. Note: Member learning requirements are unchanged. This provision refers specifically to the component responsibility to deliver course hours.
- Deletes the requirement to comply with CES Provider standards. While the standards still apply to all providers, it will no longer be examined via accreditation. Rather, CES will investigate complaints as needed to ensure compliance.
- State components are encouraged—but not required—to appoint a state architecture licensing advisor.

Finance & operations

- Deletes requirement to list all types of insurance coverage carried (General liability and directors and officers insurance must still be carried.)
- Specifies three key financial reports to be provided to component boards at least quarterly.
- Simplifies the financial data and transaction security policy required.
- Deletes requirement to report dues rates every September 15. Components that do not report on time will be unable to alter their dues rates for the upcoming cycle.
- Attendance at the Leadership Summit and CACE Annual Meeting are encouraged, but not required.

Governance

- Moves up the annual deadline to report component officers to November 30.
- Components no longer must provide general board orientation, because AIA now provides this virtually. Every component board member is urged but not required to attend AIA's virtual orientation. Components are required only to supplement this orientation with a board orientation on any important information specific to their component.

Membership

- Components are encouraged—but not required—to demonstrate how they welcome and engage with members.
- Components are encouraged—but not required—to solicit member feedback every three years.

Application process

- The application seeks information on the component's activities in 2025.
- When deciding what to submit with this application, choose something that will show a reviewer that the component is successfully delivering that service. Some questions specify what to provide, while others are flexible.
- When a document is requested, please provide it in PDF form.
- Some questions provide space to submit a text response or a yes-or-no response instead of a document. Unless the question specifies when the activity needed to occur (say, within the past year or quarter), simply provide the most recent example of that activity.

Timeline

2025	January–March	Coaching, training
	April 15	Accreditation portal opens
2026	January 15	Accreditation portal closes
	February	Submissions reviewed; results communicated
	March	Accreditations renewed for 2026–2028
	August	Deadline to update or correct submissions

Frequently asked questions

What are “Core Member Services?”

Core Member Services are basic deliverables—categorized into six topics—that all members have a right to expect from the AIA component network.

Who delivers the Core Member Services?

AIA national, state, and local components each have roles to play in delivering services that advocate for the profession, communicate with members and the public, provide learning opportunities, and manage component operations, finances, and governance. In states where there are also local components, the components in that state decide among themselves who will deliver each Core Member Service and make a statewide agreement to do so.

Why and how do chapters create at least 4 hours of CES content annually?

One of the most important ways components engage members and stay relevant is to provide quality continuing education targeted to their members’ needs. Courses that the component creates or adapts and delivers using its own CES provider account will qualify.

A component may also co-create courses with other AIA component Providers. The course lives on one component’s CES account, but all components who meaningfully contribute content for a course may get credit for it if they report it on the CES Provider Form.

How do you know that Core Member Services are being delivered?

An accreditation process verifies that Core Member Services are being delivered. Each of the six service areas has questions for the component. Documentation to submit is specified in the application and elsewhere in this booklet.

How does the accreditation application work?

Components use an online accreditation application, found on the OpenWater platform. Starting mid-year 2025, the portal will be open year-round for components to upload their information any time they wish until the review period begins on January 15, 2026. Training will be provided in how to use the portal.

Who should file the application?

Each component should identify a person who will be responsible for the chapter’s accreditation application. A collaborator may help with the application, but the primary applicant who started the application must be the one to submit the final application.

What if a component cannot show that it provides the Core Member Services?

That component will not be awarded accreditation. Such components will receive coaching and have several months after the review period to submit additional information.

What happens if a component cannot sufficiently improve their submission?

Those components will need to explore an alternative governance structure that enables the component's members to successfully receive all Core Member Services. This could entail merging chapters, becoming a voluntary section, or engaging another chapter for services. The AIA Secretary will direct the component to begin transitioning into an alternate structure, and AIA Component Relations will work with the chapter through this process.

How does accreditation affect components that use association management companies (AMCs) to staff their operations?

Components using AMCs must provide the same services as other components. If any Core Member Service is not part of the current AMC scope of work, that agreement should be revised to cover all Core Member Services. Or a component using an AMC may partner with another component to deliver that service and record that in the statewide agreement.

How long does accreditation last?

The upcoming round will cover components for 2026–2028. Each year between full accreditations, components also complete an accreditation checkup on 1) federal taxes, 2) insurance, 3) corporate registration, 4) officers, and 5) continuing education.

Who should we contact with other questions?

Ann Dorough, CAE
Director, Component Engagement
anndorough@aia.org
(202) 626 7412

Core Member Services 4.0

Advocacy

1. *State components only:* Plan and conduct advocacy efforts at the state level.

- **Develop a state legislative agenda aligned with the AIA Public Policies and Position Statements. Share that agenda and critical legislation with AIA and with local components around the state.**
- **Engage with the state's legislature and other officials on issues of importance to the architectural community.**

Documentation:

- Provide a copy of the state component's legislative agenda, which should address any key legislative issues that affect the architecture profession in the state. Summarize efforts made in the most recent legislative session to advance this agenda, and summarize the results produced by those activities. Also summarize the component's engagement with the state licensing board. Use the advocacy action template provided or provide a document of your own as you prefer.

2. *Local components only:* Engage with government or the public.

- **This may entail engaging with local government agencies, decision makers, and building officials on issues of importance to the local architectural community.**
- **OR components may engage with the public to raise awareness about the value of design and the role of architects.**

Documentation:

- Provide a summary of the local component's engagement with local government officials and staff (such as the permitting office, zoning board, or legislative bodies)
- OR provide a summary of at least one key public awareness activity and the target audience and an example of a public outreach communication.

3. *State components only:* Appoint and maintain contact with the AIA state disaster coordinator to interface with emergency management officials and help components around the state prepare for potential natural or other disasters. This coordinator may be an AIA volunteer or a chapter staff member.

Documentation:

- Provide the name and contact information for the state disaster coordinator.

Communication

- 1. Maintain a component website and post at least one upcoming event on its website. Provide a point of contact so that members and the public can engage with the component.**

Documentation:

- Reviewers will examine the website for upcoming events and the point of contact.
 - Provide a link to the web page where upcoming component events are posted.
 - Provide a link to the web page showing how visitors may reach the component's point of contact (which may be an individual, a generic email address, or a contact form)

- 2. Follow AIA brand guidelines consistently across all the component's electronic and print media to ensure that members experience AIA as a unified organization.**

Documentation:

- Reviewers will examine the website to observe brand usage.
 - Provide the component website's URL.
 - Provide a weblink to a recent digital newsletter, if produced.
- If the component produces a print publication (magazine or newsletter), provide a PDF of the page showing usage of the component branding.

- 3. It is strongly encouraged--but not required--to recognize and publicize outstanding architecture projects by members.**

Documentation:

- If the component offers member project recognition (such as design awards programs, tours, displays, or other forms of publicity), show how the component highlights outstanding member work.

Education

1. Deliver continuing education to members:

- **Deliver at least 4 credit hours of LU or HSW content. This means to create or customize content, to foster high-quality courses relevant to the chapter's members. Create and manage these 4 credit hours in the component's own CES provider account.**
- **If a component does not create 4 LUs on its own but actively works with another AIA component to co-create educational content for members, it may satisfy the above 4 credit hour requirement by demonstrating how it meaningfully contributed to that content. All components working to co-create a course may get credit toward their 4 LUs.**
- **(NOTE: These educational items are among the requirements that components will report in their annual accreditation "checkup.")**

Documentation:

- AIA will verify component CES provider course records to determine whether at least 4 credit hours were filed using the component's own CES provider account.
- Components with fewer than 4 credit hours on their CES Dashboard should document on the CES partnership form how they worked with another component to co-create content, even though the course resides on another component's account.

2. Provide career information, mentoring opportunities, and ARE preparation support to emerging professionals.

Documentation:

- Provide documentation (such as a member communication, event notice, or webpage URL) for at least one of the component's AXP-related activities, ARE preparation activities, career support, or mentoring activities. ARE preparation support may be provided in collaboration with other components in the state.

3. **State components only: It is strongly encouraged, but not required, to appoint a state architect licensing advisor, who serves as a resource to AXP participants. Inform all components in the state and AXP participants about how to reach the licensing advisor in their state.**

Documentation:

- If the chapter has a licensing advisor, provide a link to the component webpage showing how AXP participants may reach the state architect licensing advisor.

Finance & operations

1. **File an IRS 990, 990EZ, 990N or host country tax return annually. (NOTE: This is one of the requirements that components will report in their annual accreditation “checkup.”)**

Documentation:

- Provide a copy of the component’s most recent IRS 990, 990EZ, or 990N return.

2. **Annually submit all tax returns and reporting required by the component’s state, local, territorial or host country jurisdictions. (NOTE: This is one of the requirements that components will report in their annual accreditation “checkup.”)**

Documentation:

- Affirm that all non-federal tax returns applicable to the component have been filed, including state or jurisdictional returns on revenues, employees, or property.

3. **Maintain both directors and officers and general liability insurance policies for the component. (NOTE: This is one of the requirements that components will report in their annual accreditation “checkup.”)**

Documentation:

- Provide either 1) a declarations page from the insurance policy or 2) a certificate of insurance, detailing the type of insurance coverage and the dates and limits of coverage.

4. **Adopt a business continuity plan to prepare the component in case of a disaster or crisis.**

Documentation:

Provide a PDF of the component’s current business continuity plan. Such a plan should address contingencies such as natural disasters, accidents, criminal or civil attacks, loss of key leaders or staff, financial or cybersecurity breaches, and public health emergencies.

5. **Provide financial reports to the board at least quarterly. These will include: statement of financial position (balance sheet), statement of activities (income statements), and statement of cash flows.**

Documentation:

- Provide a copy of a meeting agenda that shows these financial reports are being delivered to the board of directors.

- 6. Adopt and adhere to a financial management policy that assigns authority to certain staff or leader positions for these financial actions and decisions: approving the expenditure of funds, signing checks, approving payroll (if applicable), entering contracts, and maintaining accurate financial records.**

Documentation:

- Provide a copy of the component's financial management policy.

- 7. Adopt and adhere to a financial reserves policy.**

Documentation:

- Provide a copy of the component's financial reserve policy.

- 8. Adopt and adhere to a policy that governs how the component's financial records are examined annually. This may entail either an independent financial audit or review by an accounting firm or a volunteer-led financial review committee.**

Documentation:

- Provide a copy of the component's financial policy describing how financials are to be reviewed annually.

- 9. Adopt and adhere to a policy protecting the privacy of personally identifiable information, privacy of financial transactions, and general data security.**

Documentation:

- Provide a copy of the component's current policy or procedures concerning the handling of personally identifiable information (PII) financial transaction data, and security of other sensitive data.

- 10. It is strongly encouraged but not required to send at least one elected leader to the AIA Leadership Summit at least once every three years. It is strongly encouraged but not required to send executive directors who work at least 30 hours per week to the AIA Leadership Summit at least once every three years.**

Documentation:

- None needed.

- 11. It is strongly encouraged but not required to send new executive directors who work at least 30 hours per week to attend Institute Resource Training within two years of hiring.**

Documentation:

- None needed.

Governance

- 1. Adopt and comply with written policies, including 1) whistleblower protection, 2) conflicts of interest, and 3) records retention and destruction. If applicable, adopt and comply with a written policy on reviewing the chief staff executive's compensation and benefits. (While not required by law, the IRS examines whether nonprofit corporations have such policies in place.)**

Documentation:

- Provide a copy of the component's policies on whistleblower protection, conflicts of interest, and records retention and destruction.
- If the component directly employs a chief staff executive, provide a copy of the component's policy on compensation and benefits reviews for the chief staff executive.
- Describe how all board members are provided access to these policies.

- 2. Comply with AIA's policies on antitrust and sexual harassment.**

Documentation:

- Describe how the component complies with and educates its leadership and members about policies on 1) antitrust compliance and 2) avoidance of sexual harassment.

- 3. Adopt AIA's Equity, Diversity, and Inclusion Statement.**

Documentation:

- Describe how the component upholds AIA's Equity, Diversity, and Inclusion Statement.

- 4. Review and update bylaws at least once every 10 years using the AIA Model Component Bylaws as a guide (although updating every five years is recommended). Submit bylaws to AIA's general counsel after they are amended.**

Documentation:

- Provide a copy of current bylaws, which must include the date they were last amended.

- 5. Report names of the upcoming year's officers to AIA Component Collaboration & Resources annually by November 30. Components with Fonteva access enter these directly into the chapter portal. (NOTE: This is one of the requirements that components will report in their annual accreditation "checkup.")**

Documentation:

- None needed. AIA will verify that officer rosters have been entered in the system.

6. Ensure the component's board of directors has access to AIA's annual virtual board orientation. Supplement this training with component-specific orientation as needed.

Documentation:

- AIA will check attendance at AIA's national training session.
- Provide a PDF of the agenda (or a summary) from the most recent board orientation that outlines the component's board orientation content.

7. Conduct strategic planning at least every five years and align it with AIA's strategic plan to provide focus and direction for the component's activities.

Documentation:

- Provide a PDF of the component's most recent strategic plan, which includes the date of adoption.

8. Comply with all filing requirements for nonprofit organizations in the component's state or host country or territory. (NOTE: This is one of the requirements that components will report in their annual accreditation "checkup.")

Documentation:

- Provide a PDF of the record showing the component is currently registered with its state, territory, or host country as a nonprofit corporation.

Membership

- 1. Conduct retention and recruitment efforts annually to communicate the value of membership and to ensure a healthy membership base.**

Documentation:

- Describe the component's member recruitment and retention activities (such as outreach to prospects, outreach to lapsed or terminated members, visits to firms, and similar activities).

- 2. It is strongly encouraged--~~but not required~~--to welcome all new members and engage with component members of all types to foster active participation in component activities.**

Documentation:

- Describe the component's activities to engage all types of its members: architects, associates, fellows, new members, and those who are newly licensed.

- 3. It is strongly encouraged--~~but not required~~--to seek member feedback through meetings, focus groups, surveys, or another assessment method at least once every three years. Components are encouraged to partner on this activity with other components in their state.**

Documentation:

- Provide a summary of member feedback received from these assessment activities, and state when the research was conducted.