

NAEYC Affiliate Policies

NAEYC and its Affiliates are committed to a reciprocal relationship that embodies partnership as a core value, and is based on the health and capacity of sustainable, nonprofit organizations that operate with greater efficiency and effectiveness. We share a second core value in membership expansion and growth, and in creating opportunities to widen our reach to early educators, to enhance the influence our Association has on shaping a national, state and local agenda for young children, and to equip a growing and engaged membership with effective structures and processes for carrying out the work of our collective mission.

NAEYC's Policies and Procedures were carefully written to reflect the optimal relationship between NAEYC and its Affiliates, and to ensure our joint success in achieving a growing and engaged membership.

Section 1. NAEYC and Affiliate Relations

1.1 NAEYC and its Affiliates (along with any Affiliate Chapters) embrace the tenets of NAEYC's vision and mission, which may change from time to time as determined at the discretion of the Governing Board:

VISION: All young children thrive and learn in a society dedicated to ensuring they reach their full potential.

MISISON: NAEYC promotes high-quality early learning for all children, birth through age 8, by connecting practice, policy, and research. We advance a diverse, dynamic early childhood profession and support all who care for, educate, and work on behalf of young children.

NAEYC and its Affiliates seek to be high-performing, inclusive organizations that are enriched by and continually grow from our commitment to diversity. NAEYC and its Affiliates uphold these values and beliefs in all our interactions and initiatives.

CORE VALUES

Appreciate childhood as a unique and valuable stage of the human life cycle.

Base our work on knowledge of how children develop and learn.

Appreciate and support the bond between the child and family.

Recognize that children are best understood and supported in the context of family, culture, community, and society.

Respect the dignity, worth, and uniqueness of each individual (child, family member, and colleague).

Respect diversity in children, families, and colleagues.

Recognize that children and adults achieve their full potential in the context of relationships that are based on trust and respect.

CORE BELIEFS

Excellence and Innovation—We are imaginative risk takers willing to challenge assumptions while being accountable to our mission and fiscally responsible.

Transparency—We act with openness and clarity.

Reflection—We consider multiple sources of evidence and diverse perspectives to review past performance, note progress and successes, and engage in continuous quality improvement.

Equity and Opportunity—We advocate for policies, practices, and systems that promote full and inclusive participation. We confront biases that create barriers and limit the potential of children, families, and early childhood professionals.

Collaborative Relationships—We share leadership and responsibility in our work with others. We commit time and effort to ensure diverse participation and more effective outcomes. We act with integrity, respect, and trust.

NAEYC's [Strategic Direction](#) currently outlines five strategic priorities that also apply to its Affiliates:

High quality early learning: Children birth through age 8 have equitable access to developmentally appropriate, high-quality early learning.

The profession: The early childhood education professional exemplifies excellence and is recognized as vital and performing a critical role in society.

Organizational advancement: NAEYC and its Affiliates are highly-valued, credible and visible organization.

Organizational excellence: NAEYC and its Affiliates reflect excellence in all aspects of organizational health and vitality.

Leadership and innovation: NAEYC and its Affiliates cultivate leadership and innovative strategies that propel the field, profession and systems of early learning.

1.2 NAEYC Affiliates must ensure that they and any of their Affiliate Chapters adhere to the highest legal and ethical standards, protecting the name, reputation, and intellectual property of the Association, ensuring sound nonprofit management and governance, and maintaining positive relationships with all Affiliates and with NAEYC.

1.3 Affiliates must implement and maintain sound financial controls, accounting procedures, and asset management policies that promote good stewardship and help ensure fiscal viability. The affiliate Board of Directors has a fiduciary responsibility to manage the affiliate financial records.

Section 2. Affiliate Requirements

2.1 Organizations seeking to affiliate with NAEYC, and maintain such Affiliation, must meet the Affiliation Requirements (articulated below), complete the NAEYC Affiliate application and execute a charter agreement with NAEYC. Affiliation with NAEYC can only be approved or revoked by the NAEYC Governing Board.

2.2 NAEYC will receive and review applications for affiliation annually.

2.3 NAEYC Affiliates commit to working in good faith to maintain their affiliation by continuing to provide ongoing evidence of satisfying the Affiliation Requirements during their term of affiliation.

2.4 Local, state or regional organizations in the United States and organizations located outside of the United States may apply for affiliation with NAEYC. If organizations outside of the U.S., apply for NAEYC affiliation, such organizations must meet the Affiliation Requirements and satisfy additional requirements as set forth in the Affiliation Application international addendum.

Section 3. Affiliation Requirements

NAEYC Affiliates will meet the Affiliation Requirements through the Application and Annual Report submissions process [link to procedure]:

3.1 Maintain a vision, mission and brand identity consistent with NAEYC's vision, mission and brand identity as further detailed in the NAEYC Brand Guidelines.

3.2. Operate as a High Performing Inclusive Organization, as further set forth in the principles of a high-performing, inclusive organization (HPIO), as articulated in the Strategic Direction.

3.3. Demonstrate a commitment to NAEYC's strategic direction, policy initiatives, and professional development as evidenced through the Affiliate's annual reporting process.

3.4. Conduct an active and inclusive nominations and election process that adheres to the tenets of HPIO ensuring a strong, viable governance structure, as further set forth in the principles of a high-performing, inclusive organization (HPIO), as articulated in the Strategic Direction.

3.5. Identify and increase member satisfaction with available benefits, programs, services, and engagement opportunities offered by the Affiliate and any Affiliate Chapters.

3.6. Identify and nurture emerging leaders across demographics (age, gender, gender identity, sexual orientation, race, ethnicity, and socio-economics), and geography.

3.7. Manage and support Affiliate Chapters (if applicable), to ensure the health and vitality of those business relationships, to ensure that they enhance and support an Affiliate's ability to meet these Affiliation Requirements.

3.8. Meet the following Minimum Capacity Thresholds:

Budget:

Annual operating budget of \$30,000 and an operating reserve fund with a balance to cover three-months of operating costs. Affiliates must notify NAEYC within one month if there is any change in their financial status causing them to drop below the required \$30,000 or three month operating reserve funds.

Staffing

At least one staff member or contractor whose primary responsibility is administrative oversight of all aspects of nonprofit management for the organization, who will serve as, appoint, or hire primary contacts to maintain reciprocal communication with NAEYC program leads, particularly in support of member engagement and early learning systems programmatic work, and technical assistance opportunities.

Affiliates must notify NAEYC of any turnover or vacancy of the staff member or contractor whose primary responsibility is administrative oversight of all aspects of nonprofit management for the organization within 30 days to ensure continuity in communication and administrative oversight of all aspects of nonprofit management.

Tax status

Sustain 501(c)(3) status with the IRS (or equivalent if outside the US).

Financial Reporting

Timely file the Affiliate's annual IRS information return (Form 990) and annual financial audit conducted by an independent auditor or timely filing of the Affiliate's annual IRS information return (990-N) and annual financial statements reviewed by an independent CPA.

Insurance

NAEYC Affiliates must maintain insurance in the amount of \$1M each for comprehensive liability and directors and officers coverage. NAEYC will provide Affiliates with an opportunity to purchase insurance coverage through NAEYC's insurance broker at a reduced rate each July.

Affiliates submit an online request for coverage and submit necessary payment directly to NAEYC. Upon receipt of payment, NAEYC will remit an electronic certificate of liability insurance coverage to the Affiliate. Affiliates may request additional coverage through the Special Certificate process. Such requests shall be submitted three months prior of the identified Affiliate's event, meeting, activity, etc.

Member Engagement

In coordination with NAEYC membership staff, develop member recruitment and retention targets designed to grow Affiliate membership.

Section 4. NAEYC Requirements

NAEYC commits to supporting and developing Affiliate capacity and strength by providing national infrastructure and technical assistance to help its Affiliates satisfy the Affiliation Requirements and maintain their affiliation

NAEYC commits to providing the following structures and assistance to its Affiliates, recognizing each Affiliate may need different levels and types of support:

4.1. Implement and actively maintain the technology platforms necessary for member data management and analysis. Among the available functionality, the system will allow for affiliates to generate member demographic and retention reports.

4.2. Deliver on all nationally based member benefits including interest forums, publications, customer care center, member discounts, policy and advocacy and professional learning and engagement

4.3. Create and implement a technical assistance program focused on excellence and best practice in nonprofit leadership, management and early childhood policy, program and systems.

4.4. Provide general guidance on legal best practices.

4.5. Seek and secure joint grant funding through mutually beneficial strategic alliances.

4.6. Provide high-quality membership collateral materials and templates.

4.7. Provide training and support for coordinated retention and recruitment campaigns through webinars, conference sessions, and online toolkits.

4.8. Coordinate a member recruitment campaign targeting new markets and member categories in partnership with affiliates.

4.9. Sustain reciprocal, consistent, and transparent communication with Affiliates.

4.10. Enhance the national website, highlighting Affiliate activities, events, member benefits, and services.

4.11. Work continuously with Affiliates to expand their capacity to cover additional counties (where member services do not exist) or to create new Affiliates.

4.12. Acts as the central dues collector for Affiliates.

4.13 Staffs and supports the deliberations of the Affiliate Advisory Council [link].

Section 5. Consistent Vision, Mission and Brand Identity

5.1 Vision and Mission

NAEYC Affiliates, and any Affiliate Chapters must maintain a vision and mission consistent with NAEYC's vision and mission. Affiliates are not required to adopt NAEYC's vision and mission verbatim, but are expected to maintain a vision and mission that focuses on promoting high-quality learning for all children birth through age 8 and advancing the early childhood profession and supporting all young children.

5.2 Commitment to NAEYC's Strategic Direction

Affiliate and any Affiliate Chapter activities shall be consistent with NAEYC's vision, mission, values, beliefs, and commit to the Strategic Direction. Affiliates will have flexibility to determine the extent to which they will adopt the Strategic Direction as they consider local cultural, political, economic, and demographic contexts. All Affiliate strategic plans and annual reports *broadly reflect* the national [Strategic Direction](#), but are *not required to be identical*. Consistency with NAEYC's vision and mission can be achieved through the Affiliate's alignment with NAEYC's strategic direction, core values and beliefs, and associated desired results, as reflected in the Affiliate's strategic direction or plan.

5.3 Commitment to HPIO

NAEYC and its Affiliates are committed to being high-performing, inclusive organizations as evidenced in their decision-making processes, member engagement, leadership development, nominations and elections, and programs and services. Affiliates are guided by the understanding that this requires:

- a. Recognizing the uniqueness of individuals, groups, and organizations and that becoming more high-performing and inclusive depends upon the simultaneous growth and development of individuals, groups and the organization.
- b. Defining and understanding diversity as broad, multidimensional, and inclusive of diverse viewpoints and perspectives, consistent with the overarching mission and vision of the organization.
- c. Understanding the relationship of being inclusive to being high performing, and the importance of being high performing to the organization's ability to achieve its mission and vision. The commitment to including a diversity of experiences and backgrounds requires special attention to achieving open and constructive debate prior to making decisions.
- d. Understanding and acknowledging the role of individual, organizational, and societal contexts to growth and development. Personal life experiences influence the uniqueness of individuals; organizational cultures reflect leaders' and members' understanding of pluralism and inclusion; and society reflects the power and systems that confer privilege or deny access and opportunity to individuals and groups.
- e. Seeing value in being visionary, developmental, and intentional in addressing change particularly concerning social policy, demographic, and global changes impacting the organization's capacity to achieve its mission.
- f. Seeking to leverage the inherent tensions between historical context, the power of the present, and intentional and inevitable change to remain dynamic, viable institutions. This requires intentional strategies for managing change and identifying and supporting desired results of organizational transformation.
- g. Making a long-term commitment to plan, build understanding, develop policy, and take action to sustain organizational transformation.

5.4 Brand Identity. NAEYC Affiliates and Affiliate Chapters must maintain a brand identity consistent with NAEYC’s brand identity and will be required to comply with NAEYC’s Brand Guidelines, which set forth how the “AEYC” brand can be used to ensure the power of the NAEYC brand within fundraising efforts, membership retention and recruitment campaigns, social media presence, and more.

NAEYC Affiliates’ use of NAEYC’s “AEYC” brand to identify as an Affiliate through a license granted within each Charter Agreement. However, in order to be respectful of the history of the use of other naming conventions, organizations seeking NAEYC affiliation may request an exception from NAEYC to use a name other than “AEYC” or “Association for the Education of Young Children” and such requests will be considered on a case-by-case basis. This opportunity will be included in the affiliate application process. NAEYC will develop templated promotional and collateral materials using the AEYC naming convention. These will be available for use for those Affiliates that adopt the AEYC naming convention.

All Affiliates are expected to use “an affiliate of NAEYC” on all materials (including print or electronic media) and documents when conducting official business on behalf of their members or as related to their affiliate status with NAEYC. Affiliates must require their Chapters to identify as a “chapter of the [Affiliate name].”

5.5 Brand Guidelines: NAEYC’s Brand Guidelines are developed by NAEYC staff and provide Affiliates with specifications on a range of design and brand components, such as the logo, use of name and color palette, fonts, and tagline for print and electronic/digital use. The Brand Guidelines are intended to strike a balance between cohesion with NAEYC’s national brand and the uniqueness of Affiliate’s individual identities. Taglines are intended to complement the identities of both organizations to build a unified identity across NAEYC and its affiliates.

Affiliates and Affiliate Chapters must not trademark NAEYC’s brand or intellectual property and use of NAEYC’s intellectual property must comply with the terms of the charter agreement, NAEYC Policies and Procedures and Brand Guidelines.

Section 6. Active and Inclusive Nominations Process

NAEYC Affiliates shall maintain an active nomination and elections process resulting in a full slate of Affiliate Governing Board candidates for member consideration that reflects the principles of HPIO. The Affiliate shall actively recruit, evaluate, and recommend highly qualified candidates for election or appointment to each office and position of the Affiliate Board of Directors following procedures and criteria approved by the Affiliate Board and in compliance with the Affiliate’s governing documents. Affiliates are expected to identify and nurture emerging leaders across demographics (age, gender, gender identity, sexual orientation, race, ethnicity and, socio-economics), and geography.

Affiliates must notify NAEYC Affiliate Relations of Affiliate (and Affiliate Chapter) election results within ten business days of confirmation of election results. It is Affiliates’ responsibility to ensure an active and inclusive nominations process is followed by their Affiliate Chapters.

Section 7. Mission Delivery

7.1 Affiliates are structured by geography, based on NAEYC's goal of acting on behalf of all children, which requires organizations that facilitate collaboration among all early childhood professionals to improve the professional growth opportunities and public support for all children's programs in a community or state.

7.2 Affiliates are expected to grow their capacity and resources and increase member satisfaction by implementing approaches that are highly ethical and constituent sensitive. These approaches may include fundraising, marketing, media relations, and public policy activities, all of which must be managed to be consistent with the NAEYC Governing Board's Policies and Procedures, Charter Agreement, and applicable law.

Section 8. Affiliate Engagement with Other Organizations

8.1 In addition to affiliating with NAEYC, NAEYC Affiliates may choose to affiliate with other organizations in a manner that clearly advances NAEYC's mission and purpose. Affiliates are responsible for ensuring that any other affiliations and related requirements do not violate the Mission, Vision, Values and Beliefs, Affiliation Requirements, Brand Guidelines, Charter Agreement, and/or NAEYC Policies and Procedure that apply to such Affiliate's affiliation with NAEYC. Affiliates will provide NAEYC with a list organizations with which they are affiliated as part of their initial application and on an annual basis and in the Affiliate Annual Report to NAEYC.

8.2 NAEYC Affiliate collaboration with other organizations should be pursued in a manner that clearly advances NAEYC's mission and purpose. In all cases each NAEYC Affiliate must (i) follow its own established policies and procedures, (ii) comply with all applicable laws, including tax laws, and (iii) avoid creating or allowing confusion between the collaboration and the NAEYC national organization. Affiliates may request NAEYC input if there is a question regarding whether a proposed collaboration is appropriate.

8.3 Affiliates are expected to collaborate with other NAEYC Affiliates, and share information in the spirit of working toward shared goals. Affiliates should strive to work together and speak with one voice on policy matters. Affiliates are required in their charter agreements to resolve any legal disputes with each other through binding arbitration.

Section 9. Charter Agreements. Dues and Annual Reports

9.1 All NAEYC Affiliates must sign Charter Agreements with NAEYC after being approved as an Affiliate by the NAEYC Governing Board. The Charter Agreements are binding contracts between Affiliates and NAEYC, and provide expectations for governance, structure, accountability, membership, and brand identity; and are focused on the desired relationship between Affiliates and NAEYC. Charter Agreements work in tandem with the NAEYC Policies and Procedures to provide a strong and effective affiliation structure.

9.2 In order to maintain affiliation with NAEYC, Affiliates must submit Annual Reports to NAEYC by July 1 based on their most recent 990 and past fiscal year. Charter Agreements remain in effect throughout the term of an Affiliate's affiliation with NAEYC.

9.3 As NAEYC acts as the central dues collector for Affiliate membership dues. Affiliates must sign a direct dues deposit form to allow NAEYC to remit member dues to affiliates electronically.

Section 10: Probation, Suspension and Revocation

10.1 NAEYC recognizes the importance of collaborating with Affiliates to support their successful operations. Affiliates demonstrate their commitment through their Charter and through compliance with NAEYC Policies and Procedures, most notably the Affiliate Requirements.

Occasionally, Affiliates may have difficulty complying with these requirements. Such instances of Noncompliance may result in an Affiliate being placed on probation or suspended by the Affiliate Relations Committee, or having its Charter revoked by the NAEYC Governing Board, which revocation is not subject to appeal. It is always NAEYC's intent to work collegially with affiliate leadership to support restoration of the affiliate to full, active affiliation status.

10.2 Assistance with Noncompliance

NAEYC staff may learn about instances of potential Noncompliance through the annual reporting process, failure of an Affiliate to report annually or through informal mechanisms of feedback. After learning of a potential Noncompliance matter, NAEYC staff will contact Affiliate staff to inform them of potential Noncompliance. NAEYC staff will work in good faith to gain information and assist the Affiliate with resolving the matter. If NAEYC staff can verify that the potential Noncompliance is resolved, the matter will be closed.

10.3 Probation

If no acceptable resolution is achieved through assistance efforts by NAEYC staff, NAEYC staff may, at their discretion, refer the matter to the Affiliate Relations Committee for review. If the Affiliate Relations Committee determines that there are matters of Noncompliance, the Affiliate will be notified within 36 hours of the Committee's decision, that it has been placed on Probation and given a clear description of the Noncompliance, the action(s) required to resolve the Noncompliance and the timeframe for becoming compliant.

The Affiliate Relations Committee will have the discretion to remove the Affiliate from probation status if the Affiliate providing evidence of compliance to resolve the Noncompliance to the satisfaction of the Affiliate Relations Committee during the period of probation. The Affiliate will be notified that it is no longer on probation within 36 hours of the Committee's decision, and the matter will be closed.

Probationary status will be communicated from NAEYC to the Affiliate only and will have no impact on the Affiliate's ability to accept new members, collect dues or use the AEYC name, brand, or logo.

10.4 Suspension pending Revocation

An Affiliate that does not resolve the Noncompliance during the probationary period will be placed on a minimum thirty (30) day suspension and removed from the NAEYC website during the period of suspension. The Affiliate Relations Committee will have the discretion to remove the Affiliate from suspended status if the Affiliate provides evidence of compliance to resolve the

Noncompliance to the satisfaction of the Affiliate Relations Committee during the period of suspension. The Affiliate will be notified that it is no longer on suspension within 36 hours of the Committee's decision and the matter will be closed.

Suspension status will be communicated through NAEYC's website, as suspended affiliates will not be able to accept new members. However, suspension will have no impact on current membership and dues payment to the affiliate or use of the AEYC name, brand, or logo.

10.5 Revocation

The Affiliate Relations Committee may recommend an Affiliate for Revocation if an Affiliate does not resolve the Noncompliance during its suspension. Such recommendation for revocation will be submitted to the Governing Board for consideration at its next regularly scheduled meeting.

The Affiliate Relations Committee has the discretion to recommend revocation without probation or suspension if an Affiliate egregiously violates NAEYC's Charter Agreement, Policies or Procedures.

The Affiliate will be sent a formal letter of revocation via certified mail within 36 hours of the Governing Board's decision.

A revoked Affiliate will no longer be able to accept new members, receive dues or use NAEYC's AEYC name, brand, or logo. Revoked affiliates will be removed from the NAEYC website and NAEYC will notify Affiliate members outlining the change in the Affiliate's status, and the member's options regarding their membership status with an NAEYC Affiliate.

Members of the revoked Affiliate will receive communication from NAEYC outlining the Governing Board resolution to revoke the Charter and to inform them of their membership options with another Affiliate. The revoked Affiliate shall retain member data obtained prior to or during affiliation, but will no longer have access to NAEYC's membership database upon revocation.

Section 11. Surrender of Charter

11.1 An Affiliate may surrender its charter by delivering to NAEYC written notice of its intention to do so no less than 90 days prior to the effective date of such surrender. The notice should outline the rationale for surrender, and the Affiliate's understanding that it will no longer hold the AEYC name nor have access to the member database.

11.2 NAEYC and the Affiliate surrendering its charter will collaborate on drafting a joint letter to members, notifying them of the change in affiliate status, within 30 days of the date of surrender. The letter will outline the member's options regarding their membership status with an NAEYC Affiliate.

Section 12. Affiliate Chapters

12.1 Affiliates may choose to organize member service delivery areas through Affiliate Chapters.

12.2 Chapters may be organized as a network, committee, workgroup, leadership team, or interest area or other structure as determined by the Affiliate. It is not necessary for Chapters to have an elected board or be an incorporated entity; however, affiliates entering into a charter agreement with their chapters should establish Policies and Procedures to ensure that chapter activities do not cause the Affiliate to be in violation of NAEYC affiliate requirements, including National brand guidelines and required reporting and accountability procedures for audit and tax purposes.

Chapters are not affiliated with NAEYC and NAEYC does not track membership at the Chapter level.

12.3 Chapters provide services and benefits to members of Affiliates in coordination with the Affiliate. Members of an Affiliate may partake of all Chapter activities and services within the Affiliate

12.4 Affiliates and Chapters must agree to a clear fiscal and fiduciary relationship to provide the highest level of member services, benefits, and engagement opportunities. The member experience should be meaningful. Affiliates may serve as the fiscal agent for Chapters. A “fiscal agent” is defined as an organization that acts on behalf of another party performing various financial duties.

The Affiliate may establish set services it provides to a Chapter such as sharing member data, promoting Chapter activities in their newsletter or website, member retention and recruitment plans, etc.

12.5 Affiliates with Chapters are expected to continue to meet all affiliation requirements of NAEYC, and are encouraged to develop policies and systems to ensure that their chapter’s activities advance membership growth and organizational efficacy. Affiliates will, in their application and annual report, be required to attest to their chapters’ compliance. NAEYC will make available sample chapter policies and charter agreements for Affiliates to consider.

Section 13. Expectations of Affiliates with Chapters

13.1 The Affiliate/Chapter relationship is based on reciprocal communication, transparency, partnership, and the principles of a high performing, inclusive organization, and is intended to support a diverse community of members in accordance with NAEYC’s Vision, Mission, Values, and Strategic Direction. NAEYC Affiliates can choose to establish chapters as a means to organize activities and events. Chapters are seen as an extension of the Affiliate, and are organized to maximize member engagement with less formality.

13.2 Affiliates who seek to have Affiliate Chapters should demonstrate to NAEYC the capacity to provide the necessary communication, support, and technical assistance to their Chapters.

Affiliates are expected to continue to comply with the NAEYC Policies and Procedures, Affiliation Requirements, and Charter Agreements with NAEYC. Affiliates may establish chapters defined by geography or interest group.

NAEYC Affiliate Procedures

Section 1. Affiliation Process

Organizations seeking to Affiliate with NAEYC must follow the NAEYC Affiliation Process as follows:

1. Submit an application, including any requested documentation for NAEYC Affiliation to NAEYC by December. The Application will be made available on NAEYC's website.
2. As part of the Application, provide the following:
 - a. Evidence of satisfying the Minimum Capacity Thresholds: filed copies of last 3 years of 990;
 - b. Current certificate of Good Standing from State of Incorporation or any state in which the organization is registered to do business, IRS 501(c)(3) determination letter (or equivalent if outside the US);
 - d. Governing documents: Articles of Incorporation, Bylaws, policies and procedures and approved board minutes approving the affiliate application being submitted to NAEYC certified by the Board Secretary. Insurance Certificates with evidence of Insurance;
 - f. Proof of staffing and program support requirements;
 - g. 3-year strategic direction or plan or similar concept document;
 - h. Documentation and narrative information to support how the organization meets the Affiliation Requirements;
 - i. Identify member service delivery area, and demographics of their anticipated member base;
 - j. Identify any possible chapters and the proposed chapter structure with the Affiliate, along with sample charter agreement and policies and procedures relating to Affiliate Chapters;
 - k. A list of additional affiliations

Organizations seeking to affiliate with NAEYC must provide any additional information or documentation as requested by NAEYC.

Section 2: Affiliation Approval Process

2.1 NAEYC Affiliates submit an application using NAEYC's online application form. Except in 2016, applications for affiliation will be reviewed by NAEYC Affiliate Relations staff between January and March to determine whether the Affiliation Requirements have been met and to verify the requested documentation. NAEYC staff will submit all applications and the results of their review process to the Affiliate Relations Committee for review.

2.2 The Affiliate Relations Committee will submit recommendations for affiliation to the NAEYC Governing Board for consideration and approval at the July Board meeting.

2.3 NAEYC Staff will send written notification to organizations in August upon verification of initial affiliation approval/disapproval by the NAEYC Governing Board. Affiliation with NAEYC will be

final only upon approval by the Governing Board and the full execution of a binding charter agreement with NAEYC.

Section 3. Annual Report Submission

3.1 NAEYC Affiliates submit an annual report using NAEYC's annual report template as a PDF file to Affiliate@naeyc.org with the Affiliate's name and Annual Report in the subject line. Annual reports are due July 1 and are based on the most recent 990 and the Affiliate's past fiscal year. Affiliates are expected to demonstrate a commitment to NAEYC's strategic direction, policy initiatives, and professional development as evidenced through the Affiliate's annual reporting process.

3.2 The Annual Report should include documentation of the following:

1. Continued alignment to the NAEYC Vision, Core Beliefs and Values, Mission, and Strategic Direction.
2. Substantiation that the Affiliation Requirements and Minimum Capacity Thresholds are being met. Including but not limited to:
 - (a) How the Affiliate operates as a High, Performing, Inclusive Organization (HPIO), including information on the nominations and elections process
 - (b) How the affiliate is increasing member satisfaction, and recruitment and retention of members
 - (c) A minimum operating budget of \$30K with a reserve of three month operating funds
 - (d) Insurance certificates
 - (e) Current corporate certificate of good standing
 - (f) A photo copy from the IRS website indicating the Affiliate's current status as a (c)(3).
 - (g) Goals developed for current fiscal year
 - (h) Projected revenues and expenses for the current fiscal year
 - (i) Any revisions or updates to governing documents; bylaws, articles of incorporation.

Section 4. Technical Support

4.1 Affiliates may request assistance from Affiliate Relations in developing a process that is reflective of the diversity of the early childhood workforce and necessary skills, experience, and background required to operate effective nonprofit organizations.

4.2 The intended outcome of technical assistance is to enhance the Affiliate in achieving and sustaining a high-functioning, nonprofit organization with a focus on leadership, management, and early childhood policy, program and systems.

4.3 NAEYC seeks to provide a seamless system of high quality technical assistance that is accessible and easy to navigate. NAEYC provides a tiered technical assistance program ranging from baseline services available to the Affiliate at no cost, and services available to the Affiliate for a fee. NAEYC annually evaluates its technical assistance program on quality, relevance and Affiliate satisfaction.

4.4 Baseline Services

Baseline services will include toolkits, templates, marketing and promotional materials, orientation for new Affiliate staff and board leadership, NAEYC Affiliate related conference sessions, and virtual consultation with NAEYC staff on governance, nonprofit management, membership, early childhood policy, program and systems.

4.5 Fee for Service

Affiliates may contract with NAEYC to provide consultation and facilitation services for a fee. NAEYC Staff will maintain a group of knowledgeable consultants who demonstrate core competencies across multiple content areas. Fee for services may include; strategic planning, fund development, onsite consultation for member recruitment and retention, board development, leadership, nonprofit management, and early childhood policy, programs and systems. Affiliates may request conference keynote presentations by NAEYC Staff.

4.6 NAEYC will publish an annual list of available benefits, technical assistance opportunities, and instructions on how to access.

4.7 Affiliate Relations will serve as the central coordinating hub for all technical assistance requests.

4.8 Affiliates may request technical assistance by submitting an email to affiliate@naeyc.org with "Consultation Request" in the subject line. Affiliates will receive a response within 3 business days

4.9 Onsite technical assistance or speaker requests must be submitted three months prior to the event and must be submitted through the available online form [insert link to site].

Affiliates will receive a letter of agreement outlining the scope of work and timeline, or speaking engagements for all fee based technical assistance including terms of payment and the name of assigned consultant or NAEYC Staff.

4.10 The Affiliate will cover the cost of any necessary travel and lodging for the consultant or NAEYC Staff in addition to the agreed upon fee.

4.11 Technical assistance requests requiring an extended period of time [defined as two or more months] may require reporting benchmarks and an evaluation process to ensure the quality and effectiveness of the technical assistance.

4.12 NAEYC will explore external resources and implement technical assistance to avoid duplication of services where possible. This may include leveraging group purchases for conference badges and bags, print promotional materials, or services such email marketing, virtual meeting platforms, etc.

Section 5. Brand Identity Waiver Process

Affiliates who, for business purposes, seek to not use the naming convention of "AEYC" may submit a request for an exception, in compliance with NAEYC Brand Guidelines, from the Affiliate Relations Committee through the affiliate application. The Affiliate Relations Committee will

consider this request by considering factors including the historical significance of the proposed name and brand, as well as the impact on the overall affiliate structure.