



NATP[™]
National Association of
Tax Professionals

Lead

A Guide to Serving on the National Board of Directors

Leadership

No successful member organization can exist without vision, leadership and purpose. Members of the NATP Board of Directors help set the standard for excellence and integrity in the tax industry. Our Board members build relationships, identify challenges and develop solutions. Sure, it sounds like a tall order, but it doesn't come without reward.

If you're interested in becoming a Board member, we hope you will give it thoughtful consideration and perhaps choose to share your leadership gifts with us in the future. This guide will provide you with answers to the most common questions about becoming a Board member.

1. What is the time commitment required of a Board member?

Board members put in roughly 600 hours per year. As a Board member, you can expect to be away from your office for as many as 40 days traveling, which will include attending Board meetings, National Conference and as the Board Representative at approximately three annual Chapter meetings. Whenever possible, special Board meetings will be held by conference call. You may also be called upon to participate in two or three workgroups which usually take 20 to 30 hours each and are conducted by phone and email.

2. Do I need to make travel arrangements to attend Board functions?

NATP has an excellent travel planning service, so you do not need to make arrangements for the scheduled Board meetings. You will, however, make your own hotel arrangements for annual Chapter meetings.

3. Will I be reimbursed for travel and per diem expenses incurred as a Board member?

As noted under question 2, NATP will typically make the travel arrangements for Board members. If a Board member chooses to make their own travel arrangements, reimbursement will be made up to the lowest airfare NATP would have been able to secure and the hotel accommodations booked on your own. All travel days on behalf of NATP business will have a per diem check issued in lieu of actual expense reimbursement for meals. This amount is based on the latest IRS guide for travel.

4. What is the compensation for Board meetings and are there any other benefits available to a Board member?

Board members receive a daily stipend and reimbursement for associated expenses (travel, lodging, meals) while attending regularly scheduled face-to-face Board meetings. Board members also receive compensation and reimbursement for associated expenses for each day of Chapter meetings attended as the National Board Representative. Board members also receive a free registration on all NATP education.

5. Is there a limit as to how many years a member can run for the Board and not be elected?

There is no limit.

6. What are the minimum eligibility requirements to run for the Board?

Members who are at least 25 years old and in good standing, have completed at least 20 CPE provided by NATP either at the state or national level per year for each of the past three years, have worked full-time or part-time in the tax preparation industry, have had full attendance at not less than two of the past five National Conferences and have been a member of NATP for at least three years are eligible to be nominated as Director candidates.

7. Is there a certain degree of education you must have to be eligible to run for the Board?

There are no specific educational requirements defined for a National Board member, but each candidate should be knowledgeable in the tax, accounting and/or financial fields.

8. If I am not a credentialed tax preparer, can I still run for the Board?

Absolutely. Any member who meets the minimum eligibility requirements outlined under question 6 can run for the Board.

9. Realistically, must I be an active NATP Chapter member to be chosen as a nominee for Board membership?

No, a potential candidate is not required to be a Chapter member. NATP has many members in states that do not have a Chapter, and those members each have an equal opportunity to submit an application as a potential candidate for NATP's Board of Directors. That being said, it would be advantageous to have previous leadership experience. If your state does not have a Chapter, it is beneficial for potential candidates to become active at some level, within NATP—whether that be by serving as a volunteer, serving on a workgroup, visiting nearby Chapters, etc.

10. Does the Board investigate whether a potential candidate has been sanctioned by any taxing authority?

No. However, candidates will be asked to voluntarily disclose any disciplinary issues.

11. What qualifications are looked for in a prospective Board member?

The prospective candidate should be innovative and capable of visionary planning into the future five to ten years. Time management, recognizing the necessity of deadlines, working well with others and the ability to compromise are essential characteristics of an effective Board member. Each Board member must consider that they represent the entire membership and commit to putting their individual feelings aside for the good of the whole organization.

12. Are there any geographic limits on who may apply?

No, there are no geographic limits on who may apply.

13. Can I run if I am an international, academic or e-member?

No, you must be a full association member and fulfill all of the minimum requirements outlined under question 6.

14. What is the candidate process and how long does it take?

The process begins with a formal request of a candidate packet from the National Office. Though more information regarding this initial step can be obtained by contacting the National Office, formal requests for a candidate packet must be made via email. Once you submit your valid, timely-received packet to the National Office, the Nominations Committee will begin the process of evaluating candidate packets and contacting references. The Nominations Committee will conduct nominee interviews at National Conference. Once the interviews are finalized, the scores are compiled and the candidates with the highest scores will make the ballot. The timeframe for this process varies since due dates of packets are set according to yearly National Conference dates. Once the ballot is set, members will be asked to vote before the deadline for a timely submission of ballots to the National Office. The ballots are tabulated and certified by a third party balloting firm. Nominees will be contacted and notified of the results before the announcement of the newly elected Board members is made to the membership.

15. What happens to all the personal information that is submitted to the Nominations Committee?

A waiver is signed as part of the packet that you submit as a candidate for the National Board. This waiver allows all your information to be released to members and current National Board of Directors to use for voting purposes. After the ballots are struck, the information is destroyed.

16. Can I campaign, and how much, and to what extent?

Campaigning is not allowed. The nominees selected for the ballot will be introduced at National Conference and may answer questions, if asked. After the ballot is announced, nominees will wear a ribbon to identify them as such throughout Conference.

17. Must I attend the National Conference if I am running?

Yes, there are phases of the nomination process that are completed at Conference, so you must be in attendance. At Conference, you'll be introduced to the attendees and have a chance to meet with them and answer any questions they may have.

18. Is the Board involved in the daily operations of NATP? If not, what direction does the Board give?

The Board is not involved in the day-to-day operations of NATP. It is the duty of the Board to establish the vision of the association through workgroups and planning for the future, and to maintain a fiduciary responsibility to the membership.

19. What are the duties of each Board member?

The Board has the fiduciary responsibility to monitor NATP funds, to make decisions and take actions to protect the membership, and to always keep the members' interests primary.

20. What is the make-up of the Executive Committee (EC) and how is it selected?

The Executive Committee includes the President, Vice President, Secretary and Treasurer. They serve one-year terms. In December, the Nominations Committee will ask the Board members who are serving in the following year to submit names of nominees for each officer's seat. The nominees must be National Board members serving in the following year.

21. Do I need an Internet connection in order to be on the Board?

Yes, it is a very convenient and necessary way to communicate between the members, Chapters, staff and Board of Directors.

22. If I am elected to the Board can I still be an NATP instructor?

Board members are encouraged to volunteer their knowledge and experience to help with instruction of certain subjects from time to time. Board members may serve as NATP speakers, but they may not be compensated for such services while serving on the Board.

23. How many Board members serve NATP?

There are 11 National Board members.

24. What is the term of office for a Board member?

Board members are elected to serve a three-year term and may run for re-election at the end of those three years. They may only serve nine years in any 14-year period. These terms are staggered so that three to four seats are up for election each year.

Board Candidate Information Packet and Questionnaire

In spring, an information packet and questionnaire will be available for you to start the process. Please contact Jeri Christian at the NATP National Office and she will email you a packet when it becomes available. Jeri can be reached at **800.558.3402, ext. 1188**, or at jchristian@natptax.com.



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