



## **Affiliate Assistance Fund Funding Criteria & Application Process**

### **Purpose and Eligible Activities**

The purpose of the NAA Affiliate Assistance Fund (AAF) is to support nongovernment affairs-related projects of significant importance to NAA affiliates. Examples of items for which AAF funds may be used include, but are not limited to: operating expenses incurred to improve delivery of member services i.e. purchasing computer hardware, membership communications software/platforms and professional services, educational programming on local ordinances, regulations and issues that are specific to the affiliate, and/or membership recruiting activities that would otherwise not qualify for funding under NAA's Strategic Growth, Association Management Software and Computer Assistance Fund or other initiative.

### **Application Process and Requirements**

Requests for AAF funding must be submitted by an NAA-affiliated association. All applications will be reviewed and considered by the NAA Membership Committee before being forwarded with a recommendation, to the NAA Board of Directors for review at its next scheduled meeting. Applications must be received a minimum of thirty (30) days prior to a regularly scheduled NAA Board of Directors meeting. If expedited consideration of the affiliate AAF application is needed, the NAA Board of Directors will consider and vote upon the application within ten (10) business days by electronic means. The NAA Board of Directors, by majority vote, shall have final approval regarding the awarding of all AAF funds.

A maximum of \$100,000 may be distributed from the AAF per year; however, NAA reserves the right to make distributions in an amount less than the maximum amount. Once this cap has been reached, additional AAF funds may only be distributed if an emergency exception is approved by the NAA Board of Directors by a 2/3 majority vote. All applications will be evaluated on their merits and only the strongest applications will be funded.

All applicants must complete the AAF Application Form located on the NAA web site. A complete application includes the following information:

- Summary of the project and desired outcomes.
- The specific dollar amount being requested (no open-ended funding requests shall be considered).
- Explanation of the project's significance to the applying affiliate.
- Preliminary information on the likelihood of success or successes from the requested funds.

- Detailed outline of the affiliate’s action plan for executing the project and how AAF funds will be allocated.
- Detailed explanation of the applicant’s financial resources already committed to the project, if any, and why additional support from the AAF is needed.
- Schedule of when AAF funds for the project will be spent (i.e. a timeline for requested distributions of AAF funds).
- Explanation of how the use of AAF funds will be tracked.
- Listing of any other groups who are contributing financially to the effort and in what amounts.

In evaluating AAF applications, financial need is a major consideration. Affiliates with strong financials and reserves may not be eligible. Depending on the financial resources of the requesting affiliate additional matching funds may be required to receive AAF funding. To assist in the evaluation of financial need, applicants shall submit a copy of their latest annual financial statements and most recent monthly financial statement or an in-house prepared financial statement that has been approved by the affiliate’s Board of Directors.

No funds will be approved to pay for the establishment of local programs when that program/service is already supplied (or is in the process of being supplied) by NAA or NAAEI.

*Each of the above items must be specifically addressed and answered in full or applications will be returned for revision.*

The following restrictions apply to AAF funds:

- A maximum of \$30,000 in AAF funding may be requested per project.
- An affiliate may only be granted a maximum of \$30,000 in AAF funding per three-year cycle. This three-year cycle shall begin immediately following the date on which the first AAF funds are received by the affiliate. Exceptions to this \$30,000 per three-year cycle limit may be granted by a 2/3 majority vote of the NAA Board of Directors, upon the conclusion of the normal AAF funding request process.
- Funds may be applied to future expenditures only.
- All applying affiliates must be current on dues.

### **Distribution of AAF Funds**

If approved, AAF funds will only be distributed upon NAA’s receipt of a formal invoice, receipt or similar documentation. The affiliate needs to provide proof that the invoice to a vendor was paid, through a copy of a canceled check or similar document. Funding can be sent to organizations other than the applying affiliate with appropriate documentation. Approved funds will be earmarked within the AAF for a maximum period of 12 months. After this time unused dollars will be returned to the fund’s general balance. Further, upon completion of the project, any unused AAF funds which have been distributed to an affiliate must be returned to NAA. For each element of the project, NAA will reimburse up to the amount approved.

If the affiliate changes its priorities or extenuating circumstances in the opinion of the Membership Committee renders the project moot, any unspent allocated funds shall be withdrawn and any unspent distributed funds must be returned to NAA.

## **Reporting & Follow-up**

The applying affiliate is solely responsible for any and all reporting requirements, which may apply as a result of receiving monies from the AAF for taxation and/or other purposes. In addition, the affiliate agrees to provide all relevant information that may be needed for NAA to comply with any reporting requirements which may apply as a result of distributing monies from the AAF.

All applicants agree to the following requirements as a condition of receiving funding from the AAF:

1. Provide the Membership Committee – via NAA staff – progress reports within 15 business days of the end of each calendar quarter for a period of two years from the date the funds were distributed. If the reporting is not submitted, showing the results or impact of the funds on a timely basis, the provided funding will be refunded back to NAA.
2. Deliver a comprehensive written summary to the Membership Committee within 15 business days following completion of the project. This debriefing will include description of:
  - a. Spending of AAF funds.
  - b. The success or failure of the project.
  - c. What parts of the project worked and did not work.
3. Deliver samples of all materials developed in support of the project to NAA staff.

## **Questions**

Any questions regarding the AAF funding guidelines or application process can be directed to [Donna Butcher](#), Director, Member Programs & Compliance.