



IAAO

INTERNATIONAL ASSOCIATION
of **ASSESSING OFFICERS**

Valuing the World

Affinity Groups Manual

(Approved May 2024)

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SECTION 1

Introduction

IMPORTANT – IAAO manuals are intended to provide information. Much of the content of this manual is based upon content in the IAAO bylaws and procedural rules. If there are discrepancies between this manual and the IAAO bylaws and procedural rules, those IAAO governing documents prevail. It is the responsibility of Affinity Groups to recommend updates to this manual.

Affinity Groups are intended to connect members of the IAAO community and strengthen members' relationships with the organization. They are created to help advance and support inclusion and diversity throughout IAAO.

The primary focus is to create opportunities to bring members together who share common interests. Additionally, leadership is hopeful that creating these spaces will assist in the recruitment, development, and retention of employees in our jurisdictions and as IAAO members.

Affinity Groups should empower their members and create connections. These connections will aid in promoting and ensuring an environment where all are valued, included, and empowered to succeed.

GOAL

To encourage the formation of Affinity Groups to engage and connect IAAO members across a variety of interests and identities. All members of the groups must feel valued, respected, and visible. A strong desire for progress is of utmost significance to individuals hailing from marginalized communities.

PURPOSE

An Affinity Group is a voluntary membership group that is based on a shared experience, common goal/purpose, and/or special interest. Affinity Groups offer opportunities for members to connect on a more formalized and meaningful level beyond the traditional and/or organizational structure.

IAAO members can use these groups to support, understand, and share resources to connect with diverse jurisdictions, units, or job classifications. Affinity Groups offer individuals numerous opportunities to become more enthusiastic and involved contributors to IAAO. Affinity Groups provide opportunities to report issues/successes as well as inform the Board of Directors on a variety of policy decisions through various levels of leadership, which promotes a legitimate climate of inclusion, diversity, and equity.

OBJECTIVES

1. Build and Create a Sense of Community

- Develop a community and support network that nurtures and values the contribution of all members.
- Broaden cultural awareness.
- Recognize the beneficial connection between excellence and diversity; and pursue activities to embrace equitable access for learning and growth.
- Broaden cultural awareness in an environment where members feel valued, respected, and supported.
- Foster a supportive and inclusive environment through the promotion of open and respectful communication of ideas, challenges, and best practices.

2. Foster Cross-Affinity Group Collaboration

- Encourage collaboration and knowledge sharing among the different Affinity Groups within IAAO to leverage diverse expertise, perspectives, and resources.
- Facilitate joint initiatives, projects, or working groups that bring together members from different Affinity Groups to address common challenges and advance shared goals.
- Facilitate the sharing of resources, research findings, and case studies among Affinity Group members to promote learning and innovation.
- Promote existing platforms for members to showcase their work, share success stories, and celebrate achievements within the assessment community.
- Provide opportunities for social and professional networking between members.

3. Enhance leadership role opportunities for members from non-traditional groups.

- Support growth and professional development.
- Assist the IAAO in the area of recruiting, engaging, and retaining members.
- Promote and celebrate the IAAO in its contributions and achievements.
- Respond to and assist with Board of Directors policy decisions.

SECTION 2

Categories

When establishing Affinity Groups within IAAO, it is beneficial to define specific categories that align with the interests, identities, and support groups of its members. Listed below are not all-inclusive, but are several examples of common Affinity Groups:

1. Personal Identity-Based Affinity Groups:

- Women’s Group (WIN)
- African American Group
- LGBTQ+ Group
- Asian Group
- Hispanic Group
- Physical & Neuro Ability Group
- Ethnic and Cultural Diversity Group
- Young Professionals Group (Launch Pad)

2. Technical Interest Affinity Groups:

- Technology and Innovation Group
- Data Analytics Group
- Assessment Administration Group
- Rural and Agricultural Assessors Group
- Small/Large Jurisdictions Group
- Commercial Property Assessors Group
- Residential Property Assessors Group
- Tangible Property Assessors Group

3. Personal & Continuous Professional Development Affinity Groups:

- Leadership Development Group
 1. Wellness and Stress Management
 2. Work-Life Balance
 3. Parenting and Caregivers
 4. Health and Fitness
- Mentorship and Career Advancement Group
- Public Speaking and Presentation Skills Group
- Research and Publications Group
- Project Management Group

4. Community Engagement Affinity Groups:

- Community Outreach and Service Group
- Sustainability and Green Initiatives Group
- Social Responsibility Group
- Government Relations and Advocacy Group
- Veterans Group

SECTION 3. Expectations and Operating Principles

Each Affinity Group should have a defined leadership team to include a Chair and Vice-Chair, along with the aid of IAAO staff.

The Chair will act as the main contact between the Board of Directors and the Affinity Group members while ensuring that the established guidelines for the groups are supported with successful outcomes.

The Vice-Chair will assist and/or act in the absence of the Chair to oversee the function of the group.

EXPECTATIONS

1. Vision and Purpose:

- Clearly define and articulate the vision, mission, and goals of the Affinity Group to its members.

2. Organizational and Communication Skills:

- Coordinate and facilitate meetings, events, and activities of the Affinity Group.
- Develop and maintain a calendar of activities, ensuring that timelines and deadlines are met.
- Submit an annual report to the BoD, providing updates on the group's progress, needs, and achievements.

3. Inclusivity and Respect:

- Foster an inclusive and respectful environment where all members feel valued, heard, and respected.
- Encourage diverse perspectives ensuring that all members have the opportunity to contribute and participate while facilitating a safe space for discussion and collaboration.

4. Engagement and Participation:

- Encourage active participation and engagement from Affinity Group members in group activities, events, and initiatives.
- Provide opportunities for members to contribute their skills, expertise, and ideas to the group's initiatives.

5. Professional Development:

- Support the professional growth and development of group members.
- Identify opportunities for training, mentorship, and skill-building within the group.
- Encourage members to pursue continuous learning and provide resources to support their professional advancement.

6. Accountability and Reporting:

- Keep track of the group's progress, achievements, and challenges.
- Regularly report on the group's activities, outcomes, and needs to the IAAO leadership and members.
- Ensure that any allocated resources, including funding or logistical support, are used effectively and responsibly.

OPERATING PRINCIPLES

1. The formation of Affinity Groups requires the completion of an application and the submission of the names of interested IAAO members in good standing. Upon submission of the required materials, the IAAO Board of Directors will either approve or deny.
2. Affinity Group participants must be IAAO members in good standing. IAAO staff members may participate regardless of membership status.
3. Membership and participation in Affinity Groups shall be entirely voluntary. IAAO officers, administrators, anyone in a supervisory capacity, or members of the group may NOT coerce any member into joining or participating.
4. Membership and participation in Affinity Groups must be open to all interested members of IAAO.
5. Any program sponsored by Affinity Groups must have a financial plan to support activities.
6. Affinity Groups are not intended to and shall not duplicate or replace the activities of IAAO.
7. IAAO is committed to supporting Affinity Groups in achieving their objectives, including initiatives related to cultural celebrations such as but not limited to Black History Month, Juneteenth, Pride Month, Diversity Month, Hispanic Heritage Month, Women's History Month, and International Women's Day.
8. The IAAO Board of Directors will consider providing formal support to Affinity Groups that meet certain criteria:
 - Number of members: The number of members of the Affinity Group does not limit IAAO support. It is important to note that IAAO recognizes that not all groups will have the same number of members. The size alone may not be the sole determining factor for financial support.
 - Level of group participation: Active involvement and collaboration within the group may be factors that influence IAAO's decision to provide financial support.
 - Alignment to the strategic plan: Affinity Groups seeking financial support from IAAO should align their objectives and activities with IAAO's strategic plan. If the goals of the Affinity Group are in line with IAAO's mission and vision, it increases the likelihood of receiving financial support.
9. Affinity Groups are bound by all governing documents of IAAO, including but not limited to by-laws, procedural rules, code of ethics, branding guidelines, and social media policies.

IMPACT OF AFFINITY GROUPS THROUGH PARTICIPATION

Affinity Group participation can serve as an opportunity to prepare for future participation in committees and task forces within IAAO. Recognizing the importance of diversity, inclusion, and representation, IAAO acknowledges that Affinity Groups can provide a valuable source of individuals with relevant expertise, experiences, and perspectives.

STRUCTURE AND ENGAGEMENT GUIDELINES

1. Each Affinity Group must hold at least two business meetings annually.
2. Meetings are encouraged to have an agenda and items for discussion.
3. Notes must be taken at Affinity Group business meetings. Note-takers should reproduce and distribute the notes in a timely fashion. A copy of the notes for each Affinity Group business meeting must be submitted to members and the BoD for inclusion in BoD packets.
4. All marketing and promotional materials must be submitted for approval by the BoD.

SECTION 4

Funding and Dissolution

FUNDING

In alignment with the IAAO Finance Committee’s guidance on financial matters, Affinity Groups will collaborate closely with the Advisory Council regarding financial needs, ensuring caution and transparency in expenditures to oversee the responsible management of the group’s financial resources.

Key Actions

1. Proposal Development

- Engage in financial meetings or discussions for financial requirements and planning.
- Develop a comprehensive proposal outlining the financial requests of the Affinity Group.
- Clearly articulate the intended use of funds, such as event expenses, resources, or professional development opportunities.
- Highlight the potential benefits and value that the affinity group brings to the IAAO community.

2. Funding Request(s)

- Submit the proposal to the IAAO Finance Committee, formally requesting involvement via financial matters.
- Collaborate closely with the IAAO Finance Committee to establish a clear line of communication.

3. Evaluation and Feedback

- Seek feedback from both the Affinity Group and the Executive Committee on the collaboration, communication, and financial management processes.
- Use annual feedback from Affinity Groups and the IAAO Finance Committee to ensure continuous improvement in financial responsibility.

At the discretion of and with approval from the BoD and IAAO Treasurer, the approved Affinity Groups may obtain funding of a requested amount each year.

DISSOLVING AFFINITY GROUPS

Dissolving an Affinity Group within the IAAO may occur under certain circumstances, taking into account the best interests of the IAAO and its members. Here are some reasons that may lead to the dissolution of an Affinity Group.

1. Self-Dissolution

- The Affinity Group voluntarily chooses to dissolve itself.
- The group should report its decision to dissolve to the BoD or the designated authority.

2. Inadequate Membership or Inactivity

- The Affinity Group is unable to maintain members in good standing, as defined by operating guidelines.
- Lack of members in good standing may hinder the group's ability to function effectively, and dissolution may be considered as a result.

3. Non-Compliance with Reporting

- The Affinity Group fails to submit an annual report to the BoD. Regular reporting ensures transparency and accountability, and the absence of such reports may lead to the dissolution of the group.

4. Loss of Relevance or Accountability

- The BoD determines that the group no longer serves a clear purpose or has become insufficiently accountable for its activities. This assessment may be based on factors such as the group's lack of engagement, limited impact, or failure to align with the objectives of the IAAO.

5. Legal or Ethical Liability:

- The Affinity Group presents a legal or ethical liability to the IAAO. This could include engaging in activities that violate IAAO policies, ethics, or legal regulations, compromising the association's reputation or integrity.

SECTION 5. Checklist for Forming an Affinity Group

1. Preparation Stage

- Identify the specific need or interest for forming the Affinity Group.
- Research potential members and gather contact information.
- Draft the objectives and goals for the Affinity Group.

2. Application Stage

- Complete the Affinity Group Application, ensuring all details are accurately filled in.
 - Group's name.
 - Purpose and objectives.
 - Proposed activities and events.
 - Initial list of potential members.
- Review the application for completeness and accuracy.

3. Submission Stage

- Submit the application to the Board of Directors (BoD) for formal approval.
- Await feedback or requests for additional information.
- Prepare for a presentation: gather relevant data, and create a presentation.

4. Presentation Stage

- A representative of the proposed Affinity Group will make a presentation at the next BoD meeting.
- Highlight the group's objectives.
- Showcase potential benefits to the community/organization.
- Address any questions or concerns from the BoD.

5. Post-Approval Stage

- Upon approval, announce the formation of the new Affinity Group to the wider community/organization.
- Schedule an introductory meeting(s) for its new members.
 - Determine a convenient date, time, and venue (or virtual platform).
 - Prepare an agenda for the introductory meeting.
 - Send out invitations with details of the meeting.

6. First Meeting Stage

- Conduct the introductory meeting.
 - Welcome new members.
 - Discuss and finalize group norms and guidelines.
 - Plan the next steps and future activities.

7. Regular Meetings

- Schedule regular meetings and stay consistent.
- Engage members in planning and executing activities.
- Ensure that the group's objectives are being met and adapt as necessary.

The success of an Affinity Group often depends on the active participation of its members and a shared commitment to its objectives. Regular communication and an inclusive approach are key to sustaining the group's momentum.

ABOUT IAAO

The International Association of Assessing Officers, formerly the National Association of Assessing Officers, was founded for the purpose of establishing standards for assessment personnel. IAAO is a professional membership organization of government assessment officials and others interested in the administration of the property tax. Over the years IAAO members have developed assessment practice and administration standards and many of these standards have been adopted by state and international oversight agencies, and some have been incorporated into legislation.

IAAO continues at the forefront of assessment in North America and has been expanding its reach to the global community for the last five decades. Because standards form the rules by which North American assessors perform their duties, they may not be directly applicable to an overseas audience. The standards have been updated to also present the broad principles upon which the rules are based. IAAO believes those principles may be adapted to many differing statutory and regulatory scenarios worldwide.