

# Policy Manual

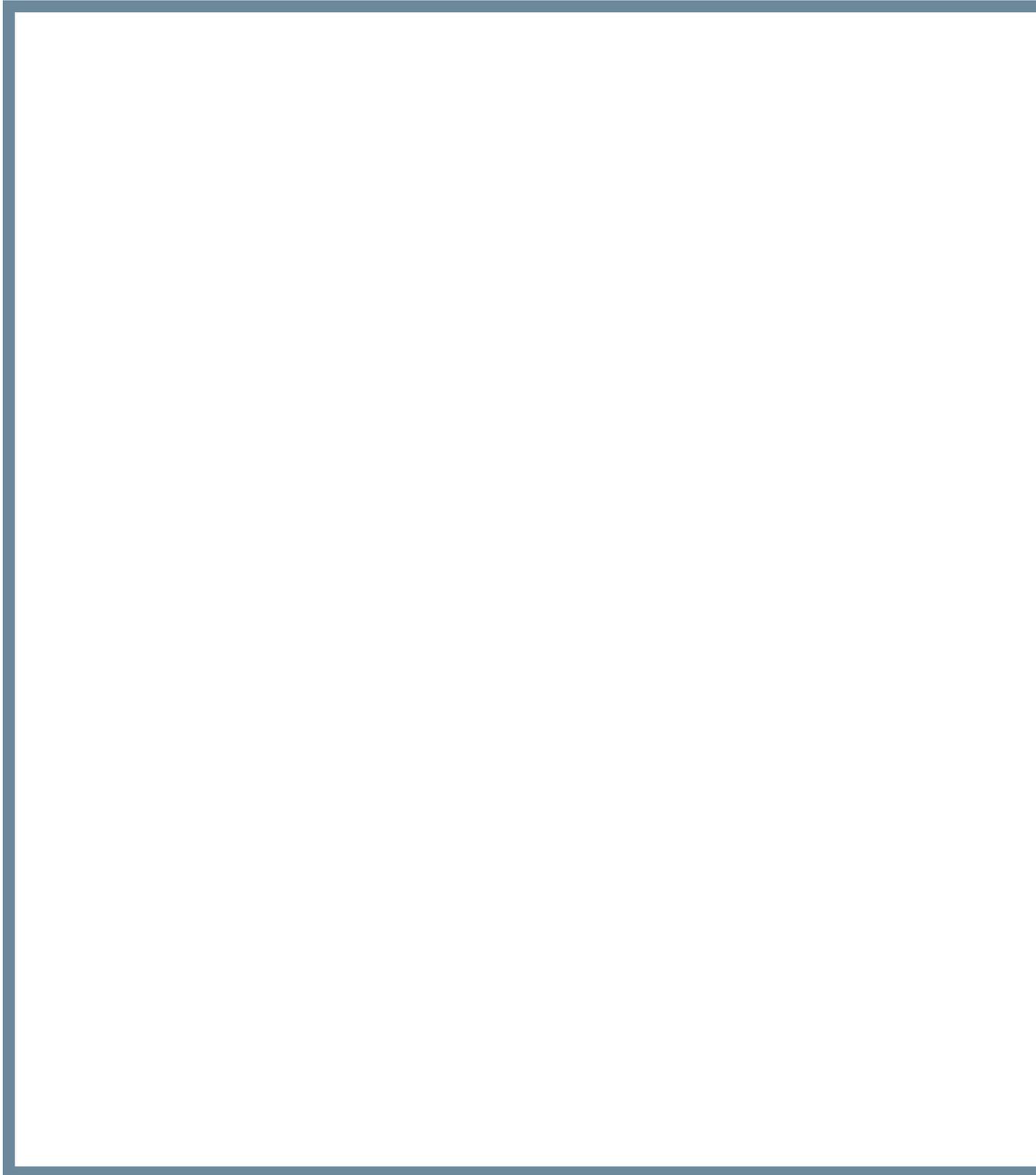


# *Policy Manual*

*p. 2*

[Table of Contents: p. 2](#)

Version: 2022-10-04



p. 3

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Table of Contents

Hyperlinks in the TOC connect directly to the policies. Each page's header links to this page.

[NAPO Mission](#), p. 6

[NAPO Core Values](#), p. 6

[Manual Structure](#), p. 7

[Related Governance Documents](#), p. 8

[Policy, Practice and Procedure Defined](#), p. 9

**Policies by Category or Committee**, below

Category or Committee	Policy Title	Policy Number	Page
General	Anti-Trust Compliance	<a href="#">GEN-001</a>	10
General	Code of Conduct	<a href="#">GEN-002</a>	11
General	Confidentiality and Non-Disclosure	<a href="#">GEN-003</a>	12
General	Conflict of Interest	<a href="#">GEN-004</a>	13
General	Intellectual Property	<a href="#">GEN-005</a>	14
General	Whistleblower Protection	<a href="#">GEN-006</a>	15
General	Records Retention	<a href="#">GEN-007</a>	16
General	Safety	<a href="#">GEN-008</a>	20
General	Insurance Coverage for National and Chapters	<a href="#">GEN-009</a>	21
General	Non-Members Serving as a Subject Matter Experts	<a href="#">GEN-010</a>	22
General	Additional Address Listing	<a href="#">GEN-011</a>	23
General	Founders Benefits	<a href="#">GEN-012</a>	24
General	Request for Proposal Restriction	<a href="#">GEN-013</a>	25
General	Joint Ventures	<a href="#">GEN-014</a>	75

p. 4

[Table of Contents: p. 2](#)

Version: 2022-10-04

General	Privacy Policy	<a href="#">GEN-015</a>	78-80
General	Alcoholic Beverages	<a href="#">GEN-016</a>	83
General	Uniform Volunteer Agreement	<a href="#">GEN-017</a>	84
General	Sunsetted	<a href="#">GEN-018</a>	90
General	Anti-Discrimination	<a href="#">GEN-019</a>	91
General	Background Checks	<a href="#">GEN-020</a>	92
General	Recategorized	<a href="#">GEN-021</a>	94
Board of Directors	Sunsetted	<a href="#">BOD-001</a>	26
Board of Directors	Board Meetings Attendees	<a href="#">BOD-002</a>	27
Board of Directors	Board Members Conference Speaking Restriction	<a href="#">BOD-003</a>	28
Board of Directors	Board Member Benefits	<a href="#">BOD-004</a>	29
Board of Directors	President Benefits	<a href="#">BOD-005</a>	30
Board of Directors	Board Meeting Communication to Members	<a href="#">BOD-006</a>	31
Board of Directors	Review of NAPO Policies	<a href="#">BOD-007</a>	32
Board of Directors	Past President Benefits	<a href="#">BOD-008</a>	33
Board of Directors	Board Elections - Structure	<a href="#">BOD-009</a>	34
Board of Directors	Board Elections - Supervision	<a href="#">BOD-010</a>	35
Board of Directors	Board Elections – Tie Vote	<a href="#">BOD-011</a>	36
Board of Directors	Board Elections - Timeline	<a href="#">BOD-012</a>	37
Board of Directors	Timeline for Strategic Planning Activities	<a href="#">BOD-013</a>	93
Board of Directors	Affiliate MOU Approval	<a href="#">BOD-014</a>	96
IFPOA	IFPOA Commitments	<a href="#">IFP-001</a>	97
HQ Team	Endorsements Restriction	<a href="#">HQT-001</a>	39
HQ Employees	Dedicated Staff Hiring	<a href="#">HQE-001</a>	98
HQ Employees	Performance Reviews	<a href="#">HQE-002</a>	100
HQ Employees	Dedicated Staff Management	<a href="#">HQE-003</a>	101



# *Policy Manual*

*p. 5*

[Table of Contents: p. 2](#)

*Version: 2022-10-04*

---

p. 6

[Table of Contents: p. 2](#)

Version: 2022-10-04

Category or Committee	Policy Title	Policy Number	Page
Awards and Recognition	Founders' Award	<a href="#">CMT-016</a>	58
Awards and Recognition	President's Award & Special Award	<a href="#">CMT-017</a>	59
BCPO	The Board of Certification for Professional Organizers (BCPO) is a division of NAPO	<a href="#">CMT-032</a>	74
BCPO	BCPO Maintenance Fee	<a href="#">CMT-026</a>	68
BCPO	BCPO Board Member Benefit	<a href="#">CMT-034</a>	77
Conference	Sunsetted	<a href="#">CMT-013</a>	53
Conference	Children's Attendance at Conference	<a href="#">CMT-018</a>	60
Conference	Conference Breakout Sessions Requirements	<a href="#">CMT-019</a>	61
Conference	Non-NAPO Sponsored Events	<a href="#">CMT-020</a>	62
Conference	Conference Program Requiring Board Approval	<a href="#">CMT-021</a>	63
Conference	Sunsetted	<a href="#">CMT-022</a>	64
Conference	Conference Chairperson Benefit	<a href="#">CMT-033</a>	76
Conference	Conference Speaker Selection	<a href="#">CMT-011</a>	51
Conference	Conference Chair Succession	<a href="#">CMT-025</a>	67
Conference	Sunsetted	<a href="#">CMT-028</a>	70
Education	Education On-Demand Honorariums	<a href="#">CMT-027</a>	69
Education	Sunsetted	<a href="#">CMT-030</a>	72
Education	Education Advisory Committee - Access to NAPO University	<a href="#">CMT-037</a>	85
Education	Education Advisory Committee - Members Selection	<a href="#">CMT-038</a>	86
Education	Education Advisory Committee - Elements Requiring Board Approval	<a href="#">CMT-039</a>	87
Education	Education Advisory Committee - NAPO University Developer/Speaker Selection	<a href="#">CMT-040</a>	88

p. 7

[Table of Contents: p. 2](#)

Version: 2022-10-04

Finance and Audit	Fiscal Year	<a href="#">CMT-001</a>	39
Finance and Audit	Investments	<a href="#">CMT-002</a>	40
Finance and Audit	Contract Signature Authorization	<a href="#">CMT-003</a>	43
Finance and Audit	Volunteer Expense Reimbursement	<a href="#">CMT-004</a>	44
Finance and Audit	Sunsetted	<a href="#">CMT-005</a>	45
Finance and Audit	Refunds of NAPO Services	<a href="#">CMT-006</a>	46
Finance and Audit	Unbudgeted Expenses	<a href="#">CMT-008</a>	48
Finance and Audit	Gift Acceptance (Donations to NAPO)	<a href="#">CMT-015</a>	55
Finance and Audit	Discounts & Give-a-ways	<a href="#">CMT-035</a>	81
Finance and Audit	Management of NAPO Matched in Memoriam Contributions	<a href="#">CMT-036</a>	82
Finance and Audit	Recategorized	<a href="#">CMT-042</a>	95
Information & Research	Sunsetted	<a href="#">CMT-010</a>	50
Information & Research	Research Session at Conference	<a href="#">CMT-028</a>	72
Membership	Lapsed Membership Reinstatement	<a href="#">CMT-007</a>	47
Membership	Sunsetted	<a href="#">CMT-009</a>	49
Membership	Chapter Business Partner Member	<a href="#">CMT-012</a>	52
Membership	Sunsetted	<a href="#">CMT-023</a>	65
Membership	Multi-Person Business Dues and Pricing	<a href="#">CMT-024</a>	66
Membership	Golden Circle Requirement	<a href="#">CMT-029</a>	71
Membership	Emeritus as AKA for Retired Member Category	<a href="#">CMT-031</a>	73
Membership	Find A Pro Directory Listing Membership Categories	<a href="#">CMT-041</a>	89
Nominations / Leadership Dvlpt	Prohibition on Campaigning	<a href="#">CMT-014</a>	54



# *Policy Manual*

*p. 8*

[Table of Contents: p. 2](#)

*Version: 2022-10-04*

## NAPO Mission

To be the leading source for productivity and organizing professionals by providing exceptional education, enhancing business connections, advancing industry research, and increasing public awareness.

## NAPO Core Values

- Respect
- Trust
- Accountability
- Needs of NAPO first
- Strategic
- Fiscally & Financially Responsible
- Mission-and Action-Driven
- Transparency
- Nimble and Responsive
- Inclusivity
- Lead by Example

## Manual Structure

### Categories

The policies are categorized by the group they most specifically address, in the order below.

Policy Type	Relevance	Code
General	all NAPO's members generally	GEN
Board	NAPO's national Board of Directors specifically	BOD
Headquarters Team	NAPO's association management company specifically	HQT
Committee	the committee the policy relates to	CMT

### Numbers

The policy numbers have two parts: the category code and a three-digit number. New policies are assigned the next available number in a given category.

### Index Accessibility

This document makes full use of internal links and relies on the Table of Contents to ease use. The TOC index allows users to see related policies grouped together even if their numbers are far apart. New policies can be numbered easily and added simply to the end of each category section without re-organizing the entire document.

p. 11

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Related Governance Documents

[Articles of Incorporation](#)

[Bylaws](#)

[Committee Charters](#)

Procedures/Operations Manual (to be created)

[Safety Position Statement](#)

[BCPO Agreement](#)

[Chapter Affiliation Agreement](#)

[Conference Scholarship Agreement](#)

[POINT User Agreement](#)

[Uniform Volunteer Agreement](#)

These documents relate to NAPO governance and may even contain policies. They should be referenced when dealing with the relevant entities and issues. Some policies within this Policy Manual directly link to a specific document; others do not.

## Policy, Practice and Procedure Defined

This manual contains only policies. Procedures and practices are documented separately in the Operations Manual.

### Policy

Merriam Webster's online dictionary (2017) defines "policy" as:

- "prudence or wisdom in the management of affairs
- a definite course or method of action selected from among alternatives and in light of given conditions to guide and determine present and future decisions
- a high-level overall plan embracing the general goals and acceptable procedures especially of a governmental body"

**In NAPO, the Board of Directors creates and revises policies for all of NAPO, including its committees.**

### Practice

Merriam Webster's online dictionary (2017) defines "practice" as:

the noun practices as "the actual application or use of an idea, belief, or method as opposed to theories about such application or use."

As a verb, it means to "carry out or perform (a particular activity, method, or custom) habitually or regularly."

**In NAPO, practices represent standard approaches to situations. They may be created by the Board, by the headquarters team, by committees and other entities, e.g., SIGs, as needed.**

### Procedure

Merriam Webster's online dictionary (2017) defines "procedure" as:

- "a series of steps followed in a regular definite order (e.g., legal procedure, surgical procedure)
- a traditional or established way of doing things"

Procedures often relate to the implementation of policies, e.g., a policy about how the President uses a corporate credit card may have related procedures for submitting receipts, etc., or practices.

**In NAPO, procedures may be created by the Board, by the headquarters team, by committees and other entities, e.g., SIGs, as needed.**

*p. 13*

[Table of Contents: p. 2](#)

Version: 2022-10-04

## General Policies

**Number:** GEN-001

**Title:** Anti-Trust Compliance

**Effective:** 2009-06

**Previous No:** 02.33.00

**Revised:** 2016-09

---

This policy is included in its entirety within the NAPO [Uniform Volunteer Agreement](#).

# Policy Manual

p. 14

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	GEN-002		
<b>Title:</b>	Code of Conduct		
<b>Effective:</b>	Unknown	<b>Previous No:</b>	N/A
<b>Revised:</b>	2009-01-23, 2016-09		

This policy is included in its entirety within the NAPO [Uniform Volunteer Agreement](#).



# *Policy Manual*

*p. 15*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-003

**Title:** Confidentiality and Non-Disclosure

**Effective:** Unknown

**Previous No:** N/A

**Revised:** 2016-09

---

This policy is included in its entirety within the NAPO [Uniform Volunteer Agreement](#).

# Policy Manual

p. 16

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-004

**Title:** Conflict of Interest

**Effective:** 2009-01-23

**Previous No:** 02.30.00, 02.31.00, 02.24.00

**Revised:** 2016-09

---

This policy is included in its entirety within the NAPO [Uniform Volunteer Agreement](#).



# *Policy Manual*

*p. 17*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-005

**Title:** Intellectual Property

**Effective:** 2016-09

**Previous No:** N/A

**Revised:** N/A

---

This policy is included in its entirety within the NAPO [Uniform Volunteer Agreement](#).



# *Policy Manual*

*p. 18*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-006

**Title:** Whistleblower Protection

**Effective:** 2009-01-23

**Previous No:** 02.32.00, 02.32.01, 02.26.00

**Revised:** 2016-09

---

This policy is included in its entirety within the NAPO [Uniform Volunteer Agreement](#).

p. 19

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-007

**Title:** Records Retention

**Committee:** N/A

**Effective:** 2009-01-01

**Previous No:** 1.30.00

**Revised:** 2017-09-14

---

## Retention Period

It is NAPO's policy that documents be retained only so long as they are:

- (1) necessary to the conduct of the Association's business;
- (2) required to be kept by statute or government regulation; or
- (3) relevant to pending or foreseeable investigations or litigation.

Retention periods are based primarily on current federal record-keeping requirements and state statutes of limitation. Currently relevant documents should be filed systematically and accessibly. Documents that must be maintained permanently can be catalogued and, if possible, reduced to some secure form of electronic record for storage and easy access when needed.

## Document Destruction/Legal Ramifications

It is NAPO's policy to adhere to the Sarbanes-Oxley Act of 2002, which prohibits corruptly tampering with, altering, destroying or concealing records in an effort to prevent their availability for use in an "official proceeding." Associations and member companies are subject to criminal penalties under provisions of that Act.

No document, including an electronic document, shall be intentionally altered, covered-up, falsified or destroyed, nor shall any employee or agent of NAPO be directed to do so, to prevent its use in an official proceeding. Upon becoming aware that any document may reasonably be anticipated to be useful in any actual or reasonably predictable official proceeding, staff shall override any document retention policy or procedure that might result in the destruction of or inability to find any such document. All attorneys employed or retained by NAPO shall be given a copy of this policy and are hereby instructed to inform NAPO management of any documents of potential use in an official proceeding.

## Official Record Type

The official version of NAPO records is in digital format and maintained on the NAPO HQ server and member communications forum.

p. 20

[Table of Contents: p. 2](#)

Version: 2022-10-04

## NAPO Records Retention Schedule

The Retention Period is in years; P stands for permanent

ACCOUNTING Records	Retention Period
Auditors' reports	P
Budgets	7
Cancelled checks, generally	6
Chart of accounts	6
Depreciation records	P
Officer, director and staff expense reports	3
Employee/contractor earnings records	3
End of year financial statements	P
Inventory lists	7
Petty cash vouchers	7
Invoices	3
Subsidiary ledgers (accounts receivable, accounts payable, etc.)	7

CORPORATE Records	Retention Period
Annual reports	P
Approved Board minutes and records of all actions taken by Board without a meeting	P
Approved executive committee minutes and records of all actions taken by executive committee without a meeting	P
Approved minutes of all members' meetings and records of all actions taken by members without a meeting	P

## Policy Manual

p. 21

[Table of Contents: p. 2](#)

Version: 2022-10-04

Articles of Incorporation	P
Authorizations for expenditures	7
Bylaws (including prior versions)	P
Policies	P
Contracts, generally	Expiration +7
Contracts, sales (UCC)	7
Membership applications	5
Membership ballots	5
Membership names and addresses	Current
Notes (internal reports, memos, etc.)	3
Written communications to rejected applicants	5
Written communications to members, general	3
Written communications to members, member discipline	5

p. 22

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>CORRESPONDENCE Records</b>	Retention Period
General, routine	3

<b>INSURANCE Records</b>	Retention Period
Accident reports	7
Insurance policies	P

<b>INTELLECTUAL PROPERTY Records</b>	Retention Period
Trademark registrations, copyright registrations, patents	P

<b>LEGAL Records</b>	Retention Period
Claims and litigation files (except drafts)	P

<b>TAX Records</b>	Retention Period
Exempt status IRS determination letter	P
Income tax returns and cancelled checks (federal, state and local)	P
Property tax returns	P
Sales and use tax returns	4

<b>OTHER Records</b>	Retention Period
Research projects	7



# *Policy Manual*

*p. 23*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-008

**Title:** Safety

**Committee** N/A

**Effective:** 2015 or 2016

**Previous No:** N/A

**Revised:** N/A

---

Neither NAPO nor NAPO Chapters may implement a policy or program involving the issuance of “safety alerts” regarding unsafe or potentially unsafe client situations.

See [NAPO Safety Position Statement](#).

p. 24

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-009

**Title:** Insurance Coverage for National and Chapters

**Committee** N/A

**Effective:** 2005-04

**Previous No:** 05.01.00 & 05.01.01

**Revised:** 2009-03

---

NAPO shall maintain the following insurance policy types and limits:

1. General Liability for \$1,000,000 per occurrence/\$3,000,000 aggregate covering NAPO National and Chapters
2. Liability Umbrella for \$2,000,000 per occurrence/\$2,000,000 aggregate for a total of \$3,000,000 per occurrence/\$5,000,000 aggregate covering NAPO National and Chapters
3. Directors and Officers/Employment Practices Liability Insurance for of \$5,000,000 covering National and Chapter Board members
4. Fiduciary Liability coverage for defense for NAPO National (The reason: Under the Employee Retirement Income Security Act of 1974 (ERISA), fiduciaries can be held personally liable for losses to a benefit plan incurred as a result of their alleged errors or omissions or breach of their fiduciary duties)



# *Policy Manual*

*p. 25*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-010

**Title:** Non-Members Serving as a Subject Matter Experts

**Committee:** N/A

**Effective:** 2014-09-29

**Previous No:** N/A

**Revised:** N/A

---

NAPO may allow non-members to serve in a non-compensatory advisory capacity on the Board or Committees as subject matter experts on a case-by-case basis with Board approval.

p. 26

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-011

**Title:** Additional Address Listing

**Committee** N/A

**Effective:** 1991-11

**Previous No:** 05.40.00

**Revised:** 2010-08

---

NAPO Professional Members with additional addresses for the same business name may purchase an additional address listing (also called a “dual address listing”) in the Member Directory for a fee.

NOTE: “Professional” was added because Provisional members do not get a directory listing.



# *Policy Manual*

*p. 27*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-012

**Title:** Founders Benefits

**Committee:** N/A

**Effective:** 2004-04

**Previous No:** 05.43.00; 06.10.01

**Revised:** 2008-01-25, 2013-02-15, 2017-09-14

---

The five founders of NAPO receive complimentary lifetime membership to NAPO and complimentary registration to all future conferences.



# *Policy Manual*

*p. 28*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-013

**Title:** Request for Proposal Restriction

**Committee** N/A

**Effective:** 2004-04

**Previous No:** 01.20.00

**Revised:** N/A

---

NAPO members shall not be allowed to respond to various Requests for Proposal issued by NAPO unless such is approved by the Board of Directors and stated within the proposal.

p. 29

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Board Policies

**Number:** BOD-001

**Title:** Sunsetting – 2022-02-07

**Committee:** N/A

**Effective:** 2009-09

**Previous No:** 01.35.00

**Revised:** N/A

---

*p. 30*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-002

**Title:** Board Meeting Attendees

**Committee:** N/A

**Effective:** 2007-08-03

**Previous No:** 02.01.03

**Revised:** 2017-09-14; 2022-02-07

---

NAPO board meetings will be attended only by Board members, Association staff and invited guests.

p. 31

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-003

**Title:** Board Members Conference Speaking Restriction

**Committee:** N/A

**Effective:** 2014-06-28

**Previous No:** N/A

**Revised:** N/A

---

NAPO Board members who speak at the NAPO National Annual Conference during their terms on the Board shall not receive a speaker fee.

Note: See also the [Conflict of Interest Policy](#). The clarification “during their terms on the Board” was added 2017-09-14. It is not a policy revision.

p. 32

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-004

**Title:** Board Members Benefits

**Committee:** N/A

**Effective:** 2006-03

**Previous No:** 02.21.01 (part)

**Revised:** 2023-11-03

---

Complimentary Annual Conference registrations will be provided to all NAPO Board members during their terms on the Board.

Complimentary access to NAPO University will be provided to all NAPO Board members during their terms on the Board and access of a one-year extension at the end of their board term.

NAPO Board members shall receive complimentary room nights at the conference hotel during his/her term of office. Number of nights will be determined annually.

Incoming NAPO Board members shall receive one complimentary room night at the conference hotel when conference falls after election and preceding his/her term of office.



# *Policy Manual*

*p. 33*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-005

**Title:** President Benefits

**Committee:** N/A

**Effective:** 2004-01

**Previous No:** 02.21.01 (part)

**Revised:** 2019-02-15

---

The NAPO President shall receive a complimentary room or suite (when available) at the conference hotel during his/her term of office.

*p. 34*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-006

**Title:** Board Meeting Communication to Members

**Committee:** N/A

**Effective:** 2004-04

**Previous No:** 02.01.00

**Revised:** 2017-09-14

---

The NAPO Board shall determine after each Board meeting what messages will be conveyed to membership and through what mechanism (e.g., cascading messages, email, etc.).



# *Policy Manual*

p. 35

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-007

**Title:** Review of NAPO Policies

**Committee:** N/A

**Effective:** 2017-09-14

**Previous No:** N/A

**Revised:** 2022-02-07

---

The Board will review a subset of its policies at each Board meeting to identify whether each policy is still relevant, needs updating or should be discontinued. All policies should be reviewed at a minimum of every three years.

p. 36

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-008

**Title:** Past President Benefits

**Committee:** N/A

**Effective:** 2004-04

**Previous No:** 05.43.00; 06.10.01

**Revised:** 2008-01-25, 2013-02-15, 2017-09-14

---

To receive past-president benefits consisting of a complimentary lifetime NAPO membership and complimentary registration to all future conferences, the past president shall:

- Maintain as confidential any information learned in confidence while serving as a NAPO Director.
- Take no action that invites or causes a breach of confidential NAPO information by a current or past NAPO Director or Nominating Committee Member.
- Comport himself/herself in a manner that supports the goals, priorities and best interest of NAPO and does no harm to the organization.

Past president benefits may be revoked by a two-thirds (2/3) vote of the Board of Directors for conduct inconsistent with the foregoing obligations.



# *Policy Manual*

*p. 37*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-009

**Title:** Board Elections - Structure

**Committee:** N/A

**Effective:** 2018-04-25

**Previous No:**

**Revised:** 2008-01-25, 2013-02-15, 2017-09-14, 2018-09-24

---

The Voting Members shall elect the President-Elect in even numbered years and shall elect the Secretary and Treasurer for staggered terms and Directors as necessary to maintain the composition of the NAPO Board as required by Bylaw Article IV – ASSOCIATION MANAGEMENT, Section 1B, Structure.

*p. 38*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-010

**Title:** Board Elections - Supervision

**Committee:** N/A

**Effective:** 2018-04-25

**Previous No:**

**Revised:** 2008-01-25, 2013-02-15, 2017-09-14, 2018-09-24, 2019-09-24-25

---

The NAPO board election procedures shall be supervised by the NAPO Board Secretary. If the current Board Secretary is on the ballot, the Teller's Report is to be sent to and signed by the Nominating/Leadership Development Committee Chair.

*p. 39*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-011

**Title:** Board Elections – Tie-Vote

**Committee:** N/A

**Effective:** 2018-04-25

**Previous No:**

**Revised:** 2008-01-25, 2013-02-15, 2017-09-14, 2018-09-24

---

In the event of a tie vote for any NAPO board election position, a run-off election shall be conducted in accordance with the same voting procedures followed in the January election.

p. 40

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-012

**Title:** Board Elections - Timelines

**Committee:** N/A

**Effective:** 2018-04-25

**Previous No:**

**Revised:** 2008-01-25, 2013-02-15, 2017-09-14, 2018-09-24

---

In order to support the January voting window required in the NAPO bylaws:

- Nominations shall be solicited from NAPO voting members at least 90 days prior to the election
- The Voting Members shall have at least 28 days to respond to the call for nominations
- The Nominating Committee shall disseminate a ballot of candidates who have consented to serve, who are qualified to serve, and have been vetted by the Nominating/Leadership Development Committee, no later than 14 days prior to the published election date

p. 41

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Headquarters Team Policies

**Number:** HQT-001

**Title:** Endorsements Restriction

**Committee:** N/A

**Effective:** 1998-06

**Previous No:** 02.23.00

**Revised:** 2019-06-12

---

The NAPO Executive Director may not issue statements that could be perceived as an endorsement by NAPO of any product or service.

p. 42

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Committee Policies

**Number:** CMT-001

**Title:** Fiscal Year

**Committee:** Finance and Audit

**Effective:** Unknown

**Previous No:** N/A

**Revised:** Formally adopted 2017-09-14

---

NAPO's fiscal year is October 1 – September 30.

p. 43

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-002

**Title:** Investments

**Committee:** Finance and Audit

**Effective:** 2017-08

**Previous No:** 03.12.00 & 03.13.00

**Revised:** 2011-05, 2013-01, 2014-01, 2015-06, 2015-09, 2020.06.29

---

## Basic Investment Premise

The Board believes that a balanced approach to portfolio management is required to reduce volatility and prudently maximize total return for the long term (at least 3-7 years). Total return is defined as the result of capital gains or losses, realized and unrealized, plus income derived from dividends and interest. It is recognized that economic and security market conditions are ever-changing and, as a result, continuous portfolio adjustments may be required to maintain asset productivity and proper balance within the appropriate risk tolerance category. It is expected that the Investment Manager(s), defined as a mutual fund or private portfolio management and financial advisor, will manage the portfolio to achieve the objective at all times. The Board does not desire a high risk, high-volatility approach limited to equity investments, intermediate-term fixed income securities (which may include government treasuries and agencies, mortgage-backed securities, corporate securities) and money market instruments.

## Definitions

NAPO's has the following types of financial assets:

1. Checking Account: cash maintained to fund operating expenses on an ongoing basis.
2. Money Market Accounts: cash equivalents.
3. Investments: unrestricted accounts that are less liquid than the cash equivalents.
4. Scholarship Fund: a restricted account that can only be used for Conference scholarships.

The term "Reserves" refers to all unrestricted accounts EXCEPT the Checking Account. In other words, it consists of the Money Market Accounts and the Investments. Our goal is to maintain 6-9 months of operating expenses in our Reserves.

The Scholarship Fund, being restricted, is not included in Reserves.

p. 44

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Investment Objectives for Investments and Scholarship Fund

### 1. Conservation of Capital

We will use the term “Investments” to refer to financial assets that are not Checking Accounts or Money Market Accounts. NAPO’s primary objective for Investments is to seek safety of principal. NAPO seeks limited portfolio volatility and a relatively high and secure level of current income. Selection of a conservation of capital investment objective implies a willingness to assume both a level of risk and total return less than that of common stocks in general. Fixed income/bonds and securities will generally represent a significant portion of Portfolio commitments. (Added Jan. 28-29, 2013)

A “conservation of capital” portfolio will be comprised primarily of U.S. domestic securities. However, the equity sector strategy may include foreign stocks (i.e., companies whose headquarters or principal place of business is not located in the U.S.).

### 2. General Guidelines

Target Asset Mix				
Low range	Target	High Range	Style	Index
25%	40%	50%	Fixed Income / Bonds	Government Bond
50%	60%	75%	Equity Securities	S&P 500

The Investment Manager(s), working with the NAPO staff, may be given discretion to act in accordance with these guidelines. These guidelines are subject to regular review and the Investment Manager(s) should feel free to recommend appropriate changes to the NAPO staff and Board of Directors.

Cash equivalent securities are viewed as a viable alternative to equity or fixed income securities as a strategy for reducing portfolio volatility, and as an alternative to a more permanent commitment to equity or fixed income securities, depending upon the Investment Manager(s) view of the markets.

The Investment Manager(s) may reduce an asset category (but not all asset categories) to 0%, with the approval of the NAPO Executive Committee or the NAPO Finance and Audit Committee.

NAPO staff in consultation with the NAPO Treasurer will keep adequate cash on hand to address financial needs, while investing to maximize investment income in line with approved investment guidelines.

### 3. Fixed Income Guidelines

- a. Maintain a target of 40% (minimum of 25% / maximum of 50%) of its investments in fixed income securities (CDs and bonds). These guidelines are subject to periodic review and adjustments by the Investment Manager with Board approval. (Jan. 2013)

p. 45

[Table of Contents: p. 2](#)

Version: 2022-10-04

- b. The maximum remaining maturity (or estimated average life on mortgage-backed issues) on each bond is limited to 15 years.
- c. The Board of Directors prefers traditional bond investments but will consider the merits of the following which are not permitted without a change in these guidelines: repurchase agreements (repos), zero coupon bonds, etc. upon recommendation and discussion by the Investment Manager(s). The Investment Manager(s) is encouraged to communicate in this regard.
- d. The minimum rating of bonds at the time of purchase shall be A by S&P or A2 by Moody's or better. A negative change in these ratings is cause for discussion of liquidation of the affected positions.

#### 4. Equity Guidelines

- a. Maintain a target of 60% (minimum of 50% / maximum of 75%) in equities.
- b. Stock investments in any one corporation shall be limited at purchase to 5% of total equity assets under management. In the case of mutual funds, exposure over all funds should attempt to be limited to this percentage also (if possible).
- c. Stock investment shall not exceed 1% of the total equity outstanding of that company.
- d. Overall stock emphasis should be placed on stocks the Investment Manager(s) believe are quality issues, and the Investment Manager(s) believe are quality issues, and the Investment Manager(s) should aim to manage risk by seeking to reduce volatility. The Board prefers traditional stock investment and wishes to avoid such techniques as short selling, using options and commodities. However, the Investment Manager(s) is encouraged to discuss any alternatives that it believes to be worthy of consideration, such as private portfolio managers, mutual funds and/or unit investment trusts.

#### Restrictions

In addition to the Fixed Income and Equity Guidelines, the board has set forth the following restraints:

- No direct investment in gold or the commodities
- No direct short sales or trading on margin
- No options including puts or calls
- No direct purchase of derivatives

#### Communication and Reporting

- There is to be an open line of communication between the NAPO Board, Staff and the Investment Manager(s).
- The Investment Manager(s) is expected to provide quarterly reports detailing all asset information and performance results. Investment results will be evaluated and compared against appropriate indices such as the Shearson Lehman Intermediate Government/ Corporate Index, the Salomon Brothers Broad Bond Index, the S&P 500 and a Balanced Index that comprises 60% S&P 500 and 40% Salomon Brothers Bond Index. Any benchmarks are intended



# *Policy Manual*

*p. 46*

[Table of Contents: p. 2](#)

*Version: 2022-10-04*

as targets only and not as an assurance or guarantee of performance of any investment or of the portfolio.

-



# *Policy Manual*

*p. 47*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-003

**Title:** Contract Signature Authorization

**Committee:** Finance and Audit

**Effective:** 2001-01

**Previous No:** 02.22.00

**Revised:** N/A

---

The NAPO Board President and/or appropriately assigned NAPO staff are the only parties authorized to sign contracts on behalf of NAPO.

*p. 48*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-004

**Title:** Volunteer Expense Reimbursement

**Committee:** Finance and Audit

**Effective:** 2002-02

**Previous No:** 03.01.00

**Revised:** 2010-08

---

NAPO volunteers are neither expected nor required to incur out-of-pocket expenses in order to carry out approved and budgeted NAPO business and will be reimbursed according to the NAPO Expense Reimbursement Guidelines and Instructions.

# *Policy Manual*

*p. 49*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-005

**Title:** Sunsetting- 2023-11-03

**Committee:** Finance and Audit

**Effective:** 2000-06

**Previous No:** 03.10.00

**Revised:** N/A

---



# *Policy Manual*

*p. 50*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-006

**Title:** Refunds of NAPO Services

**Committee:** Finance

**Effective:** 2003-06

**Previous No:** 03.11.00

**Revised:** 2023-11-2

---

All services sold by NAPO are non-refundable. Any requests for exceptions to this policy must be submitted in writing and will be decided on a case-by-case basis by Staff.

p. 51

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-007

**Title:** Lapsed Membership Reinstatement

**Committee:** Membership

**Effective:** 2007-01

**Previous No:** 05.42.00

**Revised:** N/A

---

There is a 30-day grace period following the membership expiration date during which membership may be renewed without penalty. If a membership has lapsed for more than 30 days and the member wishes to reinstate his/her original “member since” date, this can only be done within 90 days of his/her membership expiration date upon payment of an reinstatement fee. Otherwise, the “member since” date will revert to the date of the membership reinstatement.

Note: Changing the member original “join date” does not impact the “member since” date.

p. 52

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-008

**Title:** Unbudgeted Expenses

**Committee:** Finance and Audit

**Effective:** 2015-09

**Previous No:** N/A

**Revised:** N/A

---

Unbudgeted expenses will be handled as follows:

1. The Executive Director is authorized to approve an unbudgeted expense that is \$1,500 or less. The Executive Director will inform the Treasurer of this expense and the Treasurer will inform the Finance and Audit Committee and the Board.
2. The Executive Director will consult with the Executive Committee (and the Finance and Audit Committee if time permits) prior to approving a necessary unbudgeted expense that is more than \$1,500 but less than \$5,000. The Treasurer will inform the Finance and Audit Committee, if not previously consulted, and the Board of this expense.
3. The Executive Director will consult with the Board prior to approving a necessary unbudgeted expense that exceeds \$5,000.
4. The Executive Director and the Treasurer will inform the Executive Committee of the financial impact of all unbudgeted expenses that exceed \$1,500.

# *Policy Manual*

*p. 53*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-009

**Title:** Sunsetting – 2021 11-15

**Committee:** Membership

**Effective:** 2002-12

**Previous No:** 05.11.00

**Revised:** N/A

---

*p. 54*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-010

**Title:** Sunsetting – 2021-11-15

**Committee:** Information and Research

**Effective:** 2004-04

**Previous No:** 01.41.00

**Revised:** 2017-09-14

---

p. 55

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-011

**Title:** Conference Speaker Selection

**Committee:** Conference

**Effective:** 2010-06

**Previous No:** 06.17.00

**Revised:** 2018-02-02

---

To ensure a fair and impartial speaker selection process for the NAPO Annual Conference, the following guidelines are to be followed:

1. The selection process is made transparent by including an explanation of the submission and selection process in the submission site instructions.
2. Conference Committee members are not eligible to be Keynote speakers.
3. The Conference Committee Chair will be excluded from speaking as a concurrent session speaker, pre-conference session speaker, session moderator or panelist while in s/he serves in that role.
4. Conference Committee members submitting proposals to speak at conference will not rate their own submissions and therefore will not affect the collective rankings from which session selection is driven.

p. 56

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-012

**Title:** Chapter Business Partner Member

**Committee:** Membership

**Effective:** 2017-02

**Previous No:** N/A

**Revised:** N/A

---

A Chapter Business Partner Member shall be a local or regional business entity in the same regional area as the Chapter itself that is engaged in the manufacture or distribution of products and/or delivery of services that complement the organizing and productivity industry. Each Chapter Business Partner Member shall designate one individual to join the Chapter. NAPO national membership is not required.



# *Policy Manual*

*p. 57*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-013

**Title:** Sunsetting-June 9, 2022

**Committee:** Conference

**Effective:** 2000-10

**Previous No:** 06.12.00

**Revised:** 2013-01, 2014-06, 2018-02-02

---



# *Policy Manual*

*p. 58*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-014

**Title:** Prohibition on Campaigning

**Committee:** Nominations and Leadership Development  
Marketing

**Effective:** 2017-01-24

**Previous No:** N/A

**Revised:** N/A

---

NAPO prohibits electioneering or campaigning posts related to NAPO elections on NAPO-owned social media.

p. 59

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-015

**Title:** Gift Acceptance (Donations to NAPO)

**Committee:** Finance and Audit

**Effective:** 2011-10

**Previous No:** 03.14.00

**Revised:** N/A

---

NAPO encourages the solicitation and acceptance of gifts to NAPO for purposes that will help NAPO to further and fulfill its charitable, educational purposes. This Gift Acceptance Policy (“Policy”) governs the acceptance of gifts made to NAPO or for the benefit of any of its programs.

The provisions of this Policy shall apply to all gifts (which shall not include sponsorships) received by NAPO for any of its programs or services.

### **Donor’s Use of Legal Counsel**

NAPO will urge all prospective donors to seek the assistance of personal legal and financial advisors in matters relating to their gifts to NAPO and the resulting tax and estate planning consequences, in accordance with the best practices documented in the National Committee on Planned Giving’s (NCPG) Model Standards of Practice for the Charitable Gift Planner and the National Society of Fund Raising Executives’ (NSFRE) Donor Bill of Rights).

NAPO is not legally authorized to provide and shall not provide legal or tax advice to potential donors with regard to gifts to NAPO.

### **NAPO’s Use of Legal Counsel**

NAPO may retain its own legal counsel to assist in certain circumstances, including but not limited to:

- To review certain gifts, such as stock subject to buy-sell agreements or other restrictions;
- To review all transactions governed by contracts or legal documents;
- To review all transactions with potential conflicts of interest; and
- To review transactions in which the Board of Directors or Executive Committee believes that the use of counsel is appropriate.

p. 60

[Table of Contents: p. 2](#)

Version: 2022-10-04

## Acceptable Gifts

NAPO will accept unrestricted gifts and gifts for specific programs and purposes, provided that such gifts are consistent with NAPO's stated mission, purposes and priorities.

## Unacceptable Gifts

NAPO will not accept gifts that are too restrictive in purpose. Gifts that are too restrictive are those that violate NAPO's Articles of Incorporation, gifts that are too difficult to administer or gifts that are to be used for purposes outside the mission of NAPO.

NAPO will not accept gifts involving conflicts of interest that, in the judgment of the NAPO Executive Committee, may subject NAPO to sanctions under the Code.

## Types of Gifts

NAPO will accept gifts in the following forms:

- Cash:** Cash is acceptable in any form. Checks shall be made payable to NAPO and shall be delivered to NAPO's headquarters. NAPO will report cash transactions of \$10,000 or more as required by Section 6050I of the Code. Any payment or payments totaling \$10,000 or more in cash or by cashier's check from the same person in a calendar year shall be investigated to determine if a report is required.
- Credit Card**
- Tangible Personal Property:** All other gifts of tangible personal property shall be examined in light of the following criteria and the final determination on acceptance shall be made by NAPO's Executive Committee:
  - Does the property fulfill the mission of NAPO?
  - Is the property marketable?
  - Are there any undue restrictions on the use, display or sale of the property?
  - Are there any carrying costs for or potential liability associated with the property?
- Securities:** NAPO will accept gifts of publicly-traded, marketable securities. As a general rule, all marketable securities shall be sold upon receipt, unless otherwise directed by NAPO's investment advisor. In some cases, publicly-traded, marketable securities may be restricted by applicable securities laws; in such instance the final determination on the acceptance of the restricted securities shall be made by the NAPO Executive Committee. NAPO cannot accept gifts of closely-held securities, including debt and equity positions in non-publicly traded companies and interests in limited partnerships and limited liability companies.
- Life Insurance:** NAPO must be named as both beneficiary and irrevocable owner of an insurance policy before a life insurance policy will be accepted as a gift. The gift shall be valued at its interpolated terminal reserve value, or cash surrender value, upon receipt. If the donor contributes future premium payments, NAPO will include the entire

p. 61

[Table of Contents: p. 2](#)

Version: 2022-10-04

amount of the additional premium payment as a gift in the year that it is made. If the donor does not elect to continue to make gifts to cover premium payments on the policy, NAPO may continue to pay the premiums, convert the policy to paid up insurance or surrender the policy for its current cash value.

- **Retirement Plan Beneficiary Designations:** Donors and supporters of NAPO may name NAPO as beneficiary of their retirement plans. Such designations will not be recorded as gifts to NAPO until such time as the gift becomes irrevocable. When the gift is irrevocable but is not due until a future date, the present value of the gift may be recorded at the time the gift becomes irrevocable.
- **Bequests:** Donors and supporters of NAPO may make bequests to NAPO under their wills and trusts. Such bequests will not be recorded as gifts to NAPO until such time as the bequest becomes irrevocable. When the bequest is irrevocable, but is not due until a future date, the present value of the bequest may be recorded at the time the bequest becomes irrevocable.
- **Other gifts:** Subject to the right of the NAPO Board of Directors to accept a particular gift in a particular instance after due diligence to investigate the value of the potential gift and NAPO's ability to dispose of such gift within a reasonable period of time without undue cost or risk of liability, NAPO will generally not accept gifts involving real estate, bargain sales, remainder interests in property, charitable gift annuities, charitable remainder trusts, charitable lead trusts, or oil, gas or mineral interests.

## Refusal (Disclaimer) of Gifts

NAPO reserves the right to refuse (disclaim) any gift that would involve expense for NAPO or other negative impact upon NAPO, whether or not such gift is defined as unacceptable in this Policy. Except as otherwise provided herein with respect to the authority of the NAPO Board of Directors to deviate from this Policy, all decisions concerning the acceptance or refusal of any gift shall be made by the NAPO Executive Committee in its sole discretion.

## Miscellaneous Provisions

The following policies also apply:

1. **Securing appraisals and legal fees for gifts to NAPO:** It will be the responsibility of the donor to secure an appraisal (where required) and independent legal counsel for all gifts made to NAPO.
2. **Valuation of gifts for development purposes:** NAPO will record a gift received by NAPO at its valuation for gift purposes on the date of gift.
3. **Responsibility for IRS filings upon sale of gift items:** NAPO is responsible for filing IRS Form 8282 upon the sale, exchange or other disposition of any gift asset sold within three years of receipt by NAPO when the charitable deduction value of the item is more than \$500.00, unless the asset is distributed for charitable purposes. NAPO must file this form within 125 days of the date of disposition of the asset.



## *Policy Manual*

*p. 62*

[Table of Contents: p. 2](#)

*Version: 2022-10-04*

4. **Acknowledgement of all gifts made to NAPO** shall be made in compliance with the current requirements set forth in the Code.

p. 63

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-016

**Title:** Founders' Award

**Committee:** Awards and Recognition

**Effective:** 2009-01

**Previous No:** 01.10.02a

**Revised:** 2010-04-20, 2016-06-23, 2019-04-03, 2022-02-7

---

The policy regarding NAPO's Founders' Award is as follows:

1. Recipient must be a NAPO member (or a group of NAPO members) who:
  - Demonstrates outstanding innovation, inspiration and creativity both within and outside of the field of professional organizing and productivity consulting; and
  - Is admired and respected for his/her professionalism and achievements; and
  - Makes members proud to say that s/he is a member of the association.
2. Nominees must have been a NAPO Professional Member for a minimum of three (3) years at the time of the nomination.
3. Nominees may not serve on the NAPO Awards & Recognition Committee at the time of the nomination and committee members may not nominate.
4. NAPO Board of Directors must approval the Founder's Award ballot
5. Board Liaison should be a voting member of the committee.
6. The Founders' Award nomination may proceed for Member vote with a minimum of two (2) Nominations.

*p. 64*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-017

**Title:** President's Award and Special Award

**Committee:** Awards and Recognition

**Effective:** 2014-02

**Previous No:** N/A

**Revised:** N/A

---

The President's Award and the Special Award are bestowed at the discretion of NAPO's President. A President's Award recipient must be a NAPO member who has made a significant contribution that has benefitted NAPO membership. The President determines whether or not each award will be presented in any given year, selects award recipient(s) and presents the award(s).

*p. 65*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-018

**Title:** Children's Attendance at Conference

**Committee:** Conference

**Effective:** 2001-06

**Previous No:** 06.10.00

**Revised:** 2018-02-02

---

Children under the age of 14 are not permitted to attend the annual NAPO Conference with the exception of babies who are allowed into sessions for the sole purpose of being fed.



# *Policy Manual*

*p. 66*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-019

**Title:** Conference Breakout Sessions Requirements

**Committee:** Conference

**Effective:** 2009-01

**Previous No:** 06.13.00

**Revised:** 2017-09-14, 2022-11-18

---

The conference program will ensure 30% of the content will pertain to improving organizing and/or productivity skills and knowledge to better serve current and potential clients.



# *Policy Manual*

*p. 67*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-020

**Title:** Non-NAPO Sponsored Events

**Committee:** Conference

**Effective:** 2010-01-01

**Previous No:** 06.14.00

**Revised:** 2020-06-29

---

All functions at the hotel that are not part of the Official NAPO conference schedule require approval from NAPO and would be coordinated directly with the hotel upon approval.

(FYI: Our hotel/conference facility contracts require that the hotel gets approval from NAPO prior to booking such events.)

p. 68

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-021

**Title:** Conference Program Elements Requiring Board Approval

**Committee:** Conference

**Effective:** 2010-06

**Previous No:** 06.11.00, 06.15.00

**Revised:** 2018-02-02, 2022-11-18

---

The Board is required to approve the following:

- Conference concept (retreat, educational summit, conference, expo, etc.)
- Conference location and preliminary budget
- Conference program; keynote, general, pre-conference and concurrent
- Speaker honorariums exceeding budget
- Sponsorship package plan



# *Policy Manual*

*p. 69*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-022

**Title:** Sunsetting 2018-02-02

**Committee:**

**Effective:**

**Previous No:**

**Revised:**

---

# *Policy Manual*

*p. 70*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-023

**Title:** Sunsetting – 2021-06-07

**Committee:** Membership

**Effective:** 2012-01-20 and      **Previous No:** N/A  
2015-01-30

**Revised:** N/A

---

p. 71

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-024

**Title:** Multi-Person Business Dues and Pricing

**Committee:** Membership

**Effective:** 2017-02-17

**Previous No:** N/A

**Revised:** 2019-09-24-25; 2022-02-07

---

Multi-Person Business Dues and Pricing as follows: NAPO will offer multi-person business owners and their W-2 employees a dues structure of their own. They will also be eligible for the Education Bulk Pricing Discount of 25% off posted prices of NAPO University Bundles that do not include NAPO conference registration.

Conference registration rates for multi-person business owners and their W-2 employees will be discounted 25% unless the Finance and Audit Committee has a specific reason for recommending a different discount.

p. 72

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-025

**Title:** Conference Chair Succession

**Committee:** Conference

**Effective:** 2010-06

**Previous No:** 06.16.00

**Revised:** 2018-02-02, 2018-09-24, 2022-11-18

---

The NAPO President, in conjunction with the President-Elect (if serving), will appoint the Conference Chair and/or Co-Chair approximately 1.5 years out from Conference (i.e. in November 2023 for an April 2025 conference) in order to ensure proper training and transitions between Chairs as well as sufficient planning windows.



# *Policy Manual*

*p. 73*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-026

**Title:** BCPO Maintenance Fee

**Committee:** BCPO

**Effective:** 2017-02-17

**Previous No:** N/A

**Revised:** 2019.09.24-25

---

The BCPO Maintenance Fee will be collected at the beginning of each three-year recertification cycle for CPO's.



# *Policy Manual*

*p. 74*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-027

**Title:** Education On-Demand Honorariums

**Committee:**

**Effective:** 2017-04-

**Previous No:** N/A

**Revised:** N/A

---

NAPO shall place no cap on the annual on-demand honorarium paid to NAPO instructors except for courses required to achieve Professional Status; if offered for a fee, these will cap at \$2,500 a year. Courses that are offered for free will pay no honorarium. Instructors will receive compensation for every bundle purchased except for free ODCs and the Going Pro Bundle.

# *Policy Manual*

*p. 75*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-028

**Title:** Sunsetting – 2022-02-07

**Committee:** Conference and IRC

**Effective:** 2017-09-14

**Previous No:** N/A

**Revised:** N/A

---

p. 76

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-029

**Title:** Golden Circle Requirement

**Committee:** N/A

**Effective:** 2015-03-20

**Previous No:** N/A

**Revised:** 2017-09-14

---

To receive the Golden Circle designation, one must be a NAPO member for five years and have achieved Professional member status.



# *Policy Manual*

*p. 77*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-030

**Title:** Sunsetting 2020.06.29

**Committee:** Education

**Effective:** 2018-02-02

**Previous No:** N/A

**Revised:** 2020.06.29

---



# *Policy Manual*

*p. 78*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-031

**Title:** Emeritus as AKA for Retired Member Category

**Committee:** Education

**Effective:** 2018-04-25

**Previous No:** N/A

**Revised:** 2018-09-24

---

NAPO shall allow usage of the term Emeritus as an AKA (Also Known As) for the Retired Member category. (Externally, members in this category will be known as EMERITUS. Internally, the category will remain as reflected in the bylaws.)

p. 79

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** [CMT-032](#)

**Title:** The Board of Certification for Professional Organizers (BCPO)/NAPO Relationship

**Committee:** BCPO

**Effective:** 2019-04-03

**Previous No:** N/A

**Revised:** N/A

---

The Board of Certification for Professional Organizers (BCPO) is a division of NAPO.

The purpose of the BCPO is defined in the BCPO Bylaws and the NAPO Agreement of Support for the BCPO.

The relationship between NAPO and the BCPO is defined in the BCPO bylaws and the NAPO Agreement of Support for the BCPO.

p. 80

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-014

**Title:** Joint Ventures

**Committee:** General

**Effective:** 2019-04-03

**Previous No:** N/A

**Revised:** N/A

---

Should NAPO (“the Association”) be approached to enter into a joint venture or similar arrangement with a taxable entity, the Association shall evaluate the proposed arrangement under applicable federal tax law in order to protect the Association’s exempt status.

A joint venture or similar arrangement is defined as any joint ownership or contractual arrangement through which there is an agreement to jointly undertake a specific business enterprise, investment, or exempt-purpose activity.

In order to safeguard the Association’s exempt status, the Association shall consider the following when evaluating a joint venture arrangement with a taxable entity:

- Maintaining control over the venture or arrangement sufficient to ensure that it furthers the exempt purpose of the Association;
- Requiring that the venture or arrangement gives priority to furthering the Association’s exempt purposes over maximizing profits for the other participant(s);



## *Policy Manual*

*p. 81*

[Table of Contents: p. 2](#)

*Version: 2022-10-04*

- Prohibiting the venture or arrangement from engaging in activities that would jeopardize the Association's federal tax exemption; and
- Requiring that all contracts entered into with the venture be on terms that are "arm's length" or more favorable to the Association.

*p. 82*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-033

**Title:** Conference Chairperson Benefit

**Committee:** Conference

**Effective:** 2019-04-03

**Previous No:** N/A

**Revised:** 2022-11-18

---

The NAPO Conference Committee Chairperson shall receive a complimentary conference registration for their active program year as Chair.

*p. 83*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-034

**Title:** BCPO Board Member Benefit

**Committee:** BCPO

**Effective:** 2019-04-03

**Previous No:** N/A

**Revised:** 2023-11-03

---

When BCPO schedules a board meeting in conjunction with NAPO's annual conference, BCPO Board members shall receive one complimentary room night at the conference hotel. BCPO Board members have the opportunity to take NAPO University courses at no cost as a benefit to their service.

p. 84

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-015

**Title:** Privacy Policy

**Committee:** General

**Effective:** 2018-06-06

**Previous No:** N/A

**Revised:** N/A

---

## PRIVACY POLICY

This Privacy Policy governs the manner in which NAPO collects, uses, maintains and discloses information collected from users (each, a "User") of the www.napo.net website ("Site"). This privacy policy applies to the Site and all products and services offered by NAPO.

### Personal identification information

We may collect personal identification information from Users in a variety of ways, including, but not limited to, when Users visit our site, respond to a survey, fill out a form, and in connection with other activities, services, features or resources we make available on our Site. Users may be asked for, as appropriate, name, email address, phone number. Users may, however, visit our Site anonymously. We will collect personal identification information from Users only if they voluntarily submit such information to us. Users can always refuse to supply personal identification information, except that it may prevent them from engaging in certain Site related activities.

### Non-personal identification information

We may collect non-personal identification information about Users whenever they interact with our Site. Non-personal identification information may include the browser name, the type of computer and technical information about a User's means of connection to our Site, such as the operating system and the Internet service providers utilized and other similar information.

### Web browser cookies

p. 85

[Table of Contents: p. 2](#)

Version: 2022-10-04

Our Site may use "cookies" to enhance User experience. User's web browser places cookies on their hard drive for record-keeping purposes and sometimes to track information about them. User may choose to set their web browser to refuse cookies, or to alert you when cookies are being sent. If they do so, note that some parts of the Site may not function properly.

## **How we use collected information**

NAPO may collect and use User's personal information for the following purposes:

### **To improve customer service**

Information you provide helps us respond to your customer service requests and support needs more efficiently.

### **To personalize user experience**

We may use information in the aggregate to understand how our Users as a group use the services and resources provided on our Site.

### **To improve our Site**

We may use feedback you provide to improve our products and services.

### **To send periodic emails**

We may use the email address to respond to their inquiries, questions, and/or other requests. If User decides to opt-in to our mailing list, they will receive emails that may include association news, updates, related product or service information, etc.

### **To provide targeted services and content**

## **How we protect your information**

We adopt appropriate data collection, storage and processing practices and security measures to protect against unauthorized access, alteration, disclosure or destruction of your personal information, username, password, transaction information and data stored on our Site.

## **Sharing your personal information**

We do not sell, trade, or rent User's personal identification information to others. We may share generic aggregated demographic information not linked to any personal identification information regarding visitors and users with our business partners, trusted affiliates and advertisers for the purposes outlined above.

## **Third party websites**

p. 86

[Table of Contents: p. 2](#)

Version: 2022-10-04

Users may find advertising or other content on our Site that link to the sites and services of our partners, suppliers, advertisers, sponsors, licensors and other third parties. We do not control the content or links that appear on these sites and are not responsible for the practices employed by websites linked to or from our Site. In addition, these sites or services, including their content and links, may be constantly changing. These sites and services may have their own privacy policies and customer service policies. Browsing and interaction on any other website, including websites which have a link to our Site, is subject to that website's own terms and policies.

### **Changes to this privacy policy**

NAPO has the discretion to update this privacy policy at any time. When we do, we will revise the updated date at the bottom of this page. We encourage Users to frequently check this page for any changes to stay informed about how we are helping to protect the personal information we collect. You acknowledge and agree that it is your responsibility to review this privacy policy periodically and become aware of modifications.

### **Your acceptance of these terms**

By using this Site, you signify your acceptance of this policy. If you do not agree to this policy, please do not use our Site. Your continued use of the Site following the posting of changes to this policy will be deemed as your acceptance of those changes.

### **Contacting us**

If you have any questions about this Privacy Policy, the practices of this site, or your dealings with this site, please contact us at:

NAPO  
1120 Route 73, Suite 200  
Mt. Laurel, NJ 08054  
856-380-6828  
[www.napo.net](http://www.napo.net)  
[napo@napo.net](mailto:napo@napo.net)

Last updated: May 23, 2018



# ***Policy Manual***

*p. 87*

*[Table of Contents: p. 2](#)*

*Version: 2022-10-04*

p. 88

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-035

**Title:** Discounts & Give-a-ways

**Committee:** Finance & Audit

**Effective:** 2019-09-25

**Previous No:** N/A

**Revised:** N/A

---

The Finance & Audit Committee will approve all miscellaneous discounts and give-a-ways requested for promotional purposes and prizes. If the discount or give-a-way results in an unbudgeted expense line item, F & A will follow the Policy CMT-008 Unbudgeted Expenses.

p. 89

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-036

**Title:** Management of NAPO Matched In Memoriam Contributions

**Committee:** Finance & Audit

**Effective:** 2014.01.01

**Previous No:** N/A

**Revised:** N/A

---

All NAPO matched contributions of in memoriam donations that honor a NAPO Founder, a current NAPO President, or a Past NAPO President, the following stipulations apply:

- For 10 consecutive weeks after the announcement to NAPO membership of the death of a founder or Current/Past Board President, all in memoriam donations made in honor of that leader, to any NAPO donation-accepting fund, will qualify for NAPO matching funds.
- All in memoriam donations to a NAPO fund will be acknowledged in writing according to IRS standings
- NAPO's in memoriam contributions in honor of a NAPO leader (as defined in this policy) may only be made to a donation-eligible NAPO fund.
- NAPO's minimum in memoriam contribution honoring a NAPO Leader is \$250, whether or not it is matched.
- All qualified donations for a NAPO matching contribution will be matched up to a total matching fund limit of \$10,000 per fiscal year.

## *Policy Manual*

*p. 90*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-016

**Title:** Alcoholic Beverage Policy

**Committee:** General

**Effective:** 2020-02-13

**Previous No:** N/A

**Revised:** N/A

---

NAPO members shall not serve alcoholic beverages at a NAPO event. This includes Chapter, regional and national meetings held in public or in member homes. If a NAPO Chapter has an event where the serving of alcohol is appropriate, this can only be done by a person or company licensed to sell and/or dispense alcohol. NAPO and NAPO Chapter members shall not sell or dispense alcoholic beverages.



# ***Policy Manual***

*p. 91*

*[Table of Contents: p. 2](#)*

*Version: 2022-10-04*

# *Policy Manual*

p. 92

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-017

**Title:** Uniform Volunteer Agreement

**Committee:** General

**Effective:** 2020-04-24

**Previous No:** N/A

**Revised:** N/A

---

Annually, on or before May 15th, all NAPO National Board Members, National Committee Chairs, National Committee members, Chapter Leaders, and SIG chairs must sign the Uniform Volunteer Agreement.

*p. 93*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-037

**Title:** Education Advisory Committee – Access to NAPO University

**Committee:** Education

**Effective:** 2020-06-29

**Previous No:** N/A

**Revised:** N/A

---

Free access to NAPO University will be provided to all Education Advisory Committee members during their term on the committee.



# ***Policy Manual***

*p. 94*

*[Table of Contents: p. 2](#)*

*Version: 2022-10-04*

# *Policy Manual*

p. 95

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	CMT-038		
<b>Title:</b>	Education Advisory Committee - Members Selection		
<b>Committee:</b>	Education		
<b>Effective:</b>	2020-06-29	<b>Previous No:</b>	N/A
<b>Revised:</b>	2024-02-20		

---

Members of the Education Advisory Committee may not be board members of related industry associations that create educational content, including and not limited to ICD, NASMM or IAHSF.

# *Policy Manual*

p. 96

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-039

**Title:** Education Advisory Committee - Elements Requiring Board Approval

**Committee:** Education

**Effective:** 2020-06-29

**Previous No:** N/A

**Revised:** N/A

---

The Education Advisory Committee will present a revised 2-year education plan to the board for approval for each fiscal year.



# *Policy Manual*

*p. 97*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** CMT-040

**Title:** Education Advisory Committee - NAPO University Developer/Speaker Selection

**Committee:** Education

**Effective:** 2020-06-29

**Previous No:** N/A

**Revised:** N/A

---

The Education Advisory Committee Chair will be excluded from being selected as a paid course developer or presenter.

p. 98

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	CMT-041		
<b>Title:</b>	NAPO Find A Pro Directory Listing Membership Categories		
<b>Committee:</b>	Membership		
<b>Effective:</b>	2023-11-03	<b>Previous No:</b>	N/A
<b>Revised:</b>	N/A		

NAPO Find A Pro Directory includes NAPO Professional status members only. Lifetime memberships are considered professional.



# *Policy Manual*

*p. 99*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-018

**Title:** Sunsetting 11/15/2023 - Covid-19 Waiver

**Committee:** General

**Effective:** 2020-08-05

**Previous No:** N/A

**Revised:** N/A

---



# *Policy Manual*

*p. 100*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-019

**Title:** Anti-Discrimination

**Committee:** General

**Effective:** 2020-09-23

**Previous No:** N/A

**Revised:** N/A

---

NAPO does not and shall not discriminate on the basis of race, color, religion (creed), gender, gender expression, age, national origin, ethnicity, disability, marital status, sexual orientation, political affiliation or military status in any of its activities or operations. These activities include but are not limited to selection of volunteers and vendors, and provision of services. We are committed to providing an inclusive and welcoming environment for all members, clients, volunteers, subcontractors, and vendors.

p. 101

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	GEN-020	
<b>Title:</b>	Background Checks	
<b>Committee:</b>	General	
<b>Effective:</b>	2021-11-03	<b>Previous No:</b> N/A
<b>Revised:</b>	N/A	

Due to the variance in local and state laws governing background checks, protection of privacy, and to avoid discrimination, NAPO does not conduct background checks on our members. NAPO Does not authorize its Chapters, Special Interest Groups, or other component groups organized under NAPO to conduct background checks of members or prospective members. NAPO only permits the use of background checks for employment with NAPO and for vendors.



# *Policy Manual*

*p. 102*

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** BOD-013

**Title:** Timeline for Strategic Planning Activities

**Committee:** Board

**Effective:** 2021-11-15

**Previous No:** N/A

**Revised:** N/A

---

The NAPO Board will review NAPO's Organizational Charter every 6 years. The Board will develop a strategic plan every two years, to coincide with the NAPO's President's first year of their term. The Board will approve NAPO's Strategic Plan.

p. 103

[Table of Contents: p. 2](#)

Version: 2022-10-04

**Number:** GEN-021

**Title:** Recategorized – 04-03-2024

**Committee:** N/A

**Effective:** 2023-09

**Previous No:** N/A

**Revised:** N/A

# *Policy Manual*

*p. 104*

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	<b>CMT-042</b>	
<b>Title:</b>	<b>Recategorized – 04-03-2024</b>	
<b>Committee:</b>	Finance and Audit	
<b>Effective:</b>	2023-09	<b>Previous No:</b> N/A
<b>Revised:</b>	N/A	

p. 105

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	<b>BOD-014</b>	
<b>Title:</b>	<b>Affiliate MOU Approval</b>	
<b>Committee:</b>	Board of Directors	
<b>Effective:</b>	2024-04	<b>Previous No:</b> N/A
<b>Revised:</b>	N/A	

The Executive Committee may approve affiliate agreements (MOUs) on behalf of the Board of Directors.

p. 106

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	IFP-001	
<b>Title:</b>	IFPOA Commitments	
<b>Committee:</b>	IFPOA	
<b>Effective:</b>	2024-02	<b>Previous No:</b> N/A
<b>Revised:</b>	N/A	

In support of the international growth of the industry and growth of the International Federation of Professional Organizing Associations (IFPOA), NAPO commits to:

1. Extension of the conference member registration rate to all international attendees.
2. Financial support by paying the domain fee.
3. NAPO representation in IFPOA of two International Liaisons that are either serving on the current NAPO Board or a Past NAPO Board member.

p. 107

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	HQE-001		
<b>Title:</b>	Dedicated Staff Hiring		
<b>Committee:</b>	N/A		
<b>Effective:</b>	2023-09	<b>Previous No:</b>	GEN-021
<b>Revised:</b>	N/A		

NAPO has adopted a hybrid management model combining full-time NAPO staff and resources provided by an association management company (HQ). When the NAPO Board and Executive Director decide to hire additional NAPO dedicated full-time staff, we recommend that the Board follow this policy.

#### Formation of a Task Force

The ED will consult with the President. The President will request that the Executive Committee (EC) create a task force to review a job description, provide input on a rubric to assess candidates and participate in the final interview(s) for open positions.

The task force shall be an odd number of NAPO members, preferably with expertise and knowledge in the subject area of the position. The Treasurer shall be a member of the task force.

#### Hiring Process Oversight

The Executive Director (ED) is responsible for creating the job description and overseeing the hiring process. The ED will continuously update the task force at key points in the hiring process. Based on current market rates and advisement from HR the ED will make recommendations to the Treasurer on a pay range. The ED will work with the Treasurer to determine the pay range based on NAPO's strategic goals and current budget. The ED, Treasurer, and task force may request board approval to hire HQ or an outside consultant to assist in administering the application and interview process.

The job description and application plan will be presented to HQ Human Resources to ensure current hiring practices are being followed.

The ED will create a grading rubric based on the job description's criteria to assess the applicant's fitness for the position. The ED, HQ HR, or applicable staff will review applications and disqualify

*p. 108*

[Table of Contents: p. 2](#)

*Version: 2022-10-04*

those who do not meet the minimum qualifications. The top graded applications will be contacted for a phone interview by the ED, HQ HR, or applicable staff. The interviewer will create phone interview questions and present them to the ED for feedback before conducting interviews. The interviewer will take detailed notes on phone interviews and present their recommendations to the ED. The ED will determine which applicants will be moved forward for a virtual interview. The ED will conduct virtual interviews to narrow down the candidate pool to 1-3 finalists.

The ED or task force may recommend that the final candidates participate in an assigned presentation during the final interview. The ED and task force will use the rubric to assess the final interview.

The ED and task force will collaborate to determine a ranking order for final candidates. If the 1st choice is not available for employment the ED has the authority to offer the position to the next rank ordered Page 102 of 105 candidate. The ED has the authority to negotiate an employment offer within the parameters previously approved by the board.

## ED Hiring

If NAPO hires a new ED, the same process will be followed but will be led by the organization's president, or an individual they designate to oversee the process.

p. 109

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	HQE-002	
<b>Title:</b>	Performance Reviews	
<b>Committee:</b>	N/A	
<b>Effective:</b>	2024-04	<b>Previous No:</b> N/A
<b>Revised:</b>	N/A	

NAPO's Executive Director and President will ensure that NAPO staff receive annual performance reviews in accordance with Standard Operating Procedures.

p. 110

[Table of Contents: p. 2](#)

Version: 2022-10-04

<b>Number:</b>	<b>HQE-003</b>	
<b>Title:</b>	<b>Dedicated Staff Management</b>	
<b>Committee:</b>	Finance and Audit	
<b>Effective:</b>	2023-09	<b>Previous No:</b> CMT-042
<b>Revised:</b>	N/A	

## Management of Staff

The ED oversees the management of NAPO staff. This includes creating onboarding plans and annual performance goals. The ED may create and maintain an employee handbook to manage dedicated staff. The ED will conduct all 90-day new hire reviews, annual performance reviews, and exit interviews for NAPO staff. HQ may provide tools for goals and performance reviews. The ED will provide feedback to HQ regarding the performance of HQ staff to be included as part of 90-day new hire reviews and annual performance reviews for NAPO HQ staff. The NAPO President will work with HQ HR to conduct 90-day new hire reviews, annual performance reviews, annual goals, contract negotiations, and exit interviews with the ED.

## Employee Benefits

Employee Benefits will be administered by HQ. Benefits will be based on HQ's benefits. Employee benefits outside of HQ's structure require prior board approval. Based on current market rates and advisement from HR the ED will make recommendations to the Treasurer on annual performance and cost of living raises. The ED will work with the Treasurer to incorporate costs into the annual budget. Staff vacation requests will be approved by the ED. The ED will ensure appropriate coverage is in place for critical needs such as conferences or other association events. The ED will inform the EC of their vacation plans and ensure appropriate coverage is in place during their absence. Maternity & Paternity Leave NAPO will administer employee benefits, including maternity and paternity leave, pursuant to the management company's employee manual and in compliance with the state and local laws where the employee resides.

## HR Processes

HQ will administer NAPO's payroll, handle tax filings, and provide all HR duties that are outlined in the management contract.