

IEA Affiliate Requirements

The IEA's Affiliates around the world are an important part of its international Enneagram community. Affiliates are non-profit legal entities formed in states, countries or regions where a large enough group of individuals comes together and agrees to create a board of directors, form an organization to host local or regional Enneagram events and offer other forms of connection to its members. Affiliates may also be formed based on language or cultural commonalities so long as they do not adversely affect existing Affiliates and are consistent with the IEA's vision, mission and values, including its commitment to openness and inclusivity as a "big tent" organization welcoming all Enneagram lineages and traditions and inclusive of all people who support its vision and mission. All Affiliates must be approved by the IEA Board of Directors, enter into legal agreements with the IEA, and agree to adhere to the IEA's policy requirements. Affiliates are listed on the IEA's website and www.IEANinePoints.com directory and are issued IEA logos to designate their affiliation with the IEA.

Requirements for all IEA Affiliates

1. *Commitment to IEA Principles* - All of the IEA's communities, including its Affiliates, share certain broad commitments. These include:
 - Adherence to the IEA's vision, mission, values, Ethical Guidelines and DEI policies
 - Openness to Enneagram learning and teaching from all traditions and lineages and the application and use of the Enneagram across all disciplines
 - Support for the creation of safe, welcoming, and inclusive Enneagram communities for diverse individuals
2. *Legal Non-Profit Entity or Membership Association* - Each Affiliate must be formed as a legal non-profit entity or not-for-profit membership association in a particular state, country, or other jurisdiction. Affiliates must comply with all applicable laws of such jurisdictions, including laws with respect to entity formation, maintenance, governance, permits, finances and taxation, data privacy, fundraising, and the solicitation or receipt of donations.
3. *Board of Directors and Officers* –
 - a) Each Affiliate must have a Board of Directors with no fewer than 3 members at all times. Such Board must include members elected to serve as officers in at least the following capacities: President, Treasurer and Secretary. Ideally the Board of Directors will include 4 or more directors to ensure the organization's ongoing viability. Having a sufficient pool of interested members to maintain the organization and provide for leadership succession is critical to the success of an Affiliate and will be evaluated prior to formation (and reevaluated if circumstances change thereafter).
 - b) At least three Affiliate board member officers must be members of IEA Global. Each Affiliate will be granted three IEA Global Participating memberships for their three officers. If those individuals are already IEA Global members, the three free memberships can be granted to other members of the Affiliate's board. (See Appendix B)
 - c) All members of the Affiliate's Board are required to agree to the IEA's Ethical Guidelines and other policies governing conduct.
 - d) IEA Global must be provided the names, officer titles and email addresses of the members of the Affiliate's Board and notified promptly of any changes.

4. Primary Territory or Purpose of Affiliate –

- a) Only one Affiliate will be created serving a specific identified geographic territory or stated purpose. While it is understood that online events are more fluid and accessible and that individuals may participate in events and community activities with multiple Affiliates or of Affiliates outside their primary area, the goal of an Affiliate is to create a local or regional IEA community operating under the vision, mission, and values of the IEA. This local or regional community may primarily encompass a single state or country, or a reasonably sized geographic region, either within one large country or made of several smaller countries in proximity to each other that share a common language or culture and desire to collaborate on the formation and operation of an Affiliate.
- b) An Affiliate may also be formed based on shared language. In the event a language-based Affiliate is to be formed, consideration will be given to the potential impact such formation may have on other Affiliates for which that is the primary language spoken.
- c) Members may participate in more than one Affiliate. However, for purposes of discounted dues and accreditation fee levels available to Affiliate members, the geographic Affiliate of the member's stated country of residence (if there is one) will be considered the primary Affiliate for IEA membership dues purposes.
- d) The intended territory/purpose of the Affiliate must be determined in advance and approved by the IEA and will be reflected in the Affiliate's Agreement with the IEA.

5. Membership Structure and Affiliate Fees–

- a) *Affiliates outside the U.S.* maintain their own membership database. Individuals join the Affiliate as local Affiliate members. Local Affiliate members can join IEA Global at discounted rates (see Appendix A). Local Affiliate members also have access to discounted Accredited Professional fees as outlined in the IEA Accreditation policy.
- b) Individuals can join *U.S. Affiliates* by joining IEA Global and adding the Affiliate membership. The Affiliate can choose whether or not to require an additional Affiliate membership fee for those who join their Affiliate through IEA Global. *U.S. Affiliates* can also choose to offer local Affiliate memberships and allow individuals to join the Affiliate directly and pay a local Affiliate membership fee.
- c) Affiliate fees are set by zone. Affiliates earn rebates to reduce their annual affiliate fee by recruiting IEA global membership. If rebates earned during a year are less than the Annual Affiliate Fee, the Affiliate must pay the balance. (See Appendix A for details.)
- d) IEA global retains the full right to modify or change membership models and structures available to its Affiliates at any time. Advance notice will be provided of any substantial proposed changes. Affected Affiliates will be given an opportunity to discuss such changes and their impact, as well as be given a reasonable time to make any necessary adjustments in their operations. In the event mutually acceptable arrangements are not agreed to, the Affiliate may be deactivated or its affiliation with the IEA terminated. In such event, the IEA will work with the leadership of the Affiliate to communicate with affected members.

6. Affiliate Activities – Affiliates are formed for the purpose of hosting events and activities that support and advance the IEA's vision and mission of expanding the awareness and constructive use of the Enneagram and to create local and regional Enneagram community. Those activities can be listed on the IEA's website and in its directories so that individuals looking for Enneagram events and community in their area may find connection. As a result, it is necessary that each Affiliate (a) provide a web address, email, or other contact information to be listed, and (b) conduct Enneagram activities and/or provide the means for connection and engagement by its members with the Affiliate or and each other. A wide variety of activities are possible including workshops, hosting

presentations, discussion groups, book studies, newsletters, or other creative means of engaging, either virtually or in-person. The Affiliate will be asked to briefly summarize the nature of its activities in the annual Operations Report. If no activities are reported for two years in a row, the Affiliate will be deactivated and removed from the website.

7. Annual Reporting; IEA communications with Affiliate Members – On an annual basis, each Affiliate will be required to complete an Operations Report. In addition to information concerning its activities during the year, it will be required to report to the IEA the total number of its members, including local-only members, and to provide a list of the names and email addresses of its Board members and its membership. The names and addresses will be used by the IEA solely for communications about the IEA and its activities. The Affiliate must inform its members that their names and addresses will be provided to IEA global for IEA communication purposes and seek such consent as may be necessary under local laws.
8. Use of Logo and Branding Requirements – Each Affiliate will be provided an official IEA Affiliate logo incorporating its stated territory or language to be used on its website, promotional and membership materials, and in connection with its events. The Affiliate will also be provided a copy of the IEA Branding Guidelines for Affiliates governing the placement, appearance, and use of the logo. While Affiliates are permitted to do business under other names (such as “Enneagram Colorado”) that will make them more readily findable in online searches, the affiliation with the IEA must be clear and prominent on legal documents, website home pages, promotional and membership materials, etc. The Affiliate must use its IEA Affiliate logo either as its brand or on a co-branding basis as provided in the IEA Branding Guidelines and otherwise follow such guidelines in connection with all of its publications, websites and activities in order to clearly indicate its affiliation with the IEA.
9. Benefits and Duties – All Affiliates will be entitled to the benefits and expected to perform the duties set forth in this policy and the Affiliate Agreement (as modified by this policy). A summary of the current Benefits and Duties of Affiliates are attached in Appendix B. Such Benefits and Duties may be modified or amended by the IEA from time to time. Affiliates will be notified in advance of any substantial proposed change in Benefits or Duties and will be given an opportunity to discuss such changes and their impact, as well as be given a reasonable time to make any necessary adjustments in their operations.
10. U. S. Affiliates – All U. S. Affiliates are considered “subordinate chapters” of the IEA and part of its consolidated U.S. federal non-profit tax group. As a result, additional requirements with respect to documentation, reporting and operations are required. IEA Global and its accounting professionals will advise the Affiliate of all such requirements (including any changes thereto).
11. Resignation or Termination –
 - a) Any Affiliate may resign from affiliation with the IEA at any time by notifying the IEA Administrator in writing.
 - b) The IEA may terminate an Affiliate at any time for violation of the IEA’s principles or substantive policies (such as the Ethical Guidelines, conflict of interest or other similar policies, or in the event of a violation of the federal tax requirements as outlined for U.S. Affiliates that are part of the IEA’s consolidated tax exemption group), or after reasonable notice and with an opportunity to cure, for failure to comply with the requirements of this policy or the Affiliate’s Agreement with the IEA.

- c) In the case of any such resignation or termination, the Affiliate must promptly cease to use the IEA Affiliate logo, cease holding itself out as affiliated with the IEA and notify all members and others that may be affected of such resignation or termination. The IEA global membership of any member joining the Affiliate through IEA global or joining IEA global at a discounted Affiliate membership rate applicable to such Affiliate will continue in force until the member's annual renewal date, at which point IEA global membership must be renewed separately at the applicable rate to remain current.
- d) The Affiliate will cooperate with the IEA staff on a final accounting and will forward to the IEA all monies owed. The IEA will promptly remove such Affiliate from its Directories, websites, and other information, and will cease accrual of any rebates or other monies except as agreed in connection with the final accounting.

Process to Form an Affiliate

1. Application and Approvals - To become an IEA Affiliate, application must be made to the IEA as described below and such application must be approved by the IEA Staff and Board.
2. Initiation of Process – Any IEA member potentially interested in forming an Affiliate may contact the IEA Administrator and request information. The IEA Staff will describe the process and provide a copy of the Start-up Kit and this Requirements policy if requested. After reviewing the Start-up Kit and Affiliate Requirements, an informal discussion may be arranged between the IEA Staff and/or a member of the IEA Board and one or more representatives of the potential organizing group to discuss the size and experience of the group, the proposed purpose or territory, the level of potential interest in the area and other relevant information.
3. Hold one or more organizational meetings - Following such discussion, if the organizers and the IEA Staff agree that there may be the potential for an Affiliate to be formed, the organizers should schedule one or more organizational meetings to be held either in person or online. Such meetings should be publicized as broadly as possible to all known Enneagram teachers and practitioners in the proposed area, inviting them to participate and to spread the word to their colleagues and students. The IEA will assist by distributing an email invitation to such meeting to all individuals identified in the IEA's database as being from the proposed area (or an area primarily speaking the proposed language) and may further assist by posting on its social media pages or www.IEANinePoints.com
4. Formal Application – After holding one or more open organizational meetings, if there are a sufficient number of interested participants wishing to collaborate on forming a board and an Affiliate for a particular territory or purpose, the Affiliate Formation Application Form should be completed and delivered to the IEA Administrator. A formal interview with the IEA Executive Director and one or more representatives of the IEA Board will then be scheduled and conducted. Once all needed information has been provided and any issues, including the relationship of the proposed Affiliate to existing or future potential Affiliates, are resolved or clarified, the request for approval will be forwarded to the IEA Board for a vote. The Board may also request additional information be provided. In the case of U.S. Affiliates, approval must also be sought from appropriate state and federal officials to add the additional subordinated Chapter to its consolidated tax group.

5. Once approved, agreements will be signed and logos will be generated and delivered – Once the Board has approved formation of the Affiliate, the IEA Staff will work with the sponsors to ensure all necessary formation and administrative steps are completed. Such steps will include:
- a) Taking all steps necessary to form and register as required a legal non-profit entity or not-for-profit membership association in the chosen state, country, or other jurisdiction. The formation documents for such entity must clearly identify it as an Affiliate of the IEA and meet all other requirements of this policy and the laws of the local jurisdiction. In the case of U.S. Affiliates, these documents must also comply with the “U.S. Tax requirements” and may require approval of appropriate government agencies. The IEA’s staff and accountants will assist in assuring compliance with these requirements.
 - b) Providing copies of the signed and certified Affiliate’s legal formation documents (Articles, Bylaws, Certificates of Organization, etc.).
 - c) Providing the names, email addresses and officer titles of the Affiliate’s initial Board of Directors and ensuring that at least three Affiliate board member officers are members of IEA Global. [See Appendix B: Each Affiliate will be granted three IEA Global Participating memberships for their three officers. If those individuals are already IEA Global members, the three free memberships can be granted to other members of the Affiliate’s board.]
 - d) Completing all necessary IEA documentation, including signing an Affiliate Agreement with the IEA.
 - e) The IEA will provide the Affiliate with its official IEA Affiliate logo which the Affiliate will then begin using on its website, communications, and other promotional materials in accordance with the requirements of the IEA Branding Guidelines for Affiliates.
 - f) The IEA will list the Affiliate on its website and directories.

Appendix A

IEA Global Membership Dues, Rebates, and Affiliate Fees

	Professional	Participating	Participating Senior	Participating 30 & Under	Annual Affiliate Fee
Zone 1	140	30	n/a	n/a	600
Zone 2	80	30	n/a	n/a	450
Zone 3	50	30	n/a	n/a	300
Zone 4	160	85	65	30	600

- **Zone 1-3:** \$15 rebate for those who join IEA Global as Professional member (blue); \$5 rebate for Participating levels for those who join IEA Global and check the primary Affiliate's box (pink).
- **Zone 4:** \$15 rebate for those who join IEA Global as a Professional or Participating Member and also join and/or renew the U.S. Affiliate membership (blue). \$5 rebate for Senior level or 30 & Under level (pink).

Affiliate Zones**

Zone 1 – Denmark, Finland, Netherlands, Norway, Sweden

Zone 2 – Korea, Portugal, Spain

Zone 3 – Argentina, Brazil, China, Colombia, Egypt, Georgia (Caucasus), India

Zone 4 – USA: Colorado, Great Lakes, Greater Washington DC, Minnesota, Northeast, Southeast

Rebates: Affiliates earn rebates to reduce their annual affiliate fee by recruiting IEA global membership.

- Affiliates outside of the U.S. receive a share of the IEA Global membership dues for Affiliate members who join IEA Global.
- U.S. Affiliates receive a share of the IEA Global membership dues for members joining the Affiliate through IEA Global.
- All rebates will be in the form of a credit against the Affiliate's annual IEA Global dues (up to the full dues owed).
- On an annual basis, IEA Global reconciles the Affiliate Annual Fee with rebate amounts for Affiliate members who join IEA Global and check the box indicating membership in the primary Affiliate. These rebates are applied to the Annual Affiliate Fee.
- Rebate amounts to be paid by IEA Global shall not exceed the Annual Affiliate dues.
- If rebates earned are less than the Annual Affiliate Fee, the Affiliate will receive an invoice from IEA Global for the amount due. The Affiliate agrees to pay the balance of the Annual Affiliate Fee promptly once rebates have been applied to the balance due.

Affiliate Benefits
Identify as an Affiliate of the International Enneagram Association: “IEA [Territory/Language], an Affiliate of the International Enneagram Association”
Receive an official IEA Affiliate logo for use on websites, publications, and events
Earn rebates to reduce annual affiliate fee by recruiting IEA global membership. (See Appendix A)
<i>For Affiliates outside the U.S.</i> – Discounted IEA Global memberships for your affiliate members (see Appendix A) and discounted accreditation fees as described in the IEA Accreditation Policy.
<i>For U.S. Affiliates</i> - Ability to participate in the IEA’s group tax exempt status, including simplified federal tax reporting, assistance with set up and maintenance of state legal entity, and ability to accept tax-deductible contributions as a 501(c)(3), subject to applicable state requirements.
Each Affiliate will be granted three IEA Global Participating memberships for their three officers at no charge. If those individuals are already IEA Global members, the three free memberships can be granted to other members of the Affiliate’s board.
Listing as an IEA Affiliate on the IEA Website and Directories and in the IEA Annual Report
Opportunity to post articles, events, and community news on www.IEANinePoints.com
Ability to send up to two representatives to meetings of the IEA General Assembly of Affiliates (GAA) to meet and engage with other Affiliate colleagues and IEA global Board members from around the world. GAA meetings are held in conjunction with in-person IEA global conferences and periodically through virtual meeting platforms.
Receive one free or two half-price IEA global conference registrations for Affiliate representatives attending the IEA global conference and associated GAA meeting in person or virtually
Discounts applied for one “Spotlight” promotion per year at half price for an Affiliate-sponsored event. Spotlight promotions with up to 3 featured promotions are distributed two times per month by eblast to the IEA’s full database and rotate for a month on the IEA’s website and www.IEANinePoints.com
Organize and host periodic episodes of IEA LIVE. For the IEA LIVE hosted by the affiliate, their local members can attend free with a discount code provided by IEA Global for Affiliate to share with local affiliate members.
<p>Opportunity to organize and host an IEA-Endorsed Regional Conference as outlined in the IEA’s Regional Conference policy:</p> <ul style="list-style-type: none"> • Applications accepted during 4-month window beginning October 1 of even numbered years and continuing through January 31 of the following year • Requires approval from IEA Global Board • 15% of profits go to the IEA, with 5% (1/3 of total) going to the IEA Scholarship Fund • Ability to receive scholarship funds for the regional conference from the IEA (to the extent funds are then available) • IEA will promote the regional conference and communicate significant (events such as call for presenters, opening of registration, announcement of presenters, etc.) to its full database by email and through its social media outlets • Affiliates reserve the right to offer discount to other affiliate board members to attend regional conference
<p>Opportunity to organize presentations or events with IEA Accredited Professionals participating in the IEA Speakers Bureau (to be negotiated directly with the speaker):</p> <ul style="list-style-type: none"> • one or more online 2-hour presentations may be arranged for free and/or • one longer or in-person workshop or presentation per year may be arranged for minimal cost (speaker’s expenses plus a discounted honorarium or speaker’s fee)

Appendix B

Affiliate Duties
Operate as a legal not-for-profit entity in compliance with the laws and requirements of its country or state of organization.
Operate under the direction of a board of directors with at least three members, including a President, Treasurer and Secretary. Inform the IEA of names, email addresses and titles of its board members and officers and promptly notify the IEA of any changes.
Ensure that at least three Affiliate board member officers are members of IEA Global. [See benefits: Each Affiliate will be granted three IEA Global Participating memberships for their three officers. If those individuals are already IEA Global members, the three free memberships can be granted to other members of the Affiliate's board.]
Uphold the IEA vision, mission and values and operate consistently within the IEA's Ethical Guidelines and other policy requirements.
Welcome all local Enneagram teachers, practitioners and enthusiasts with openness and inclusivity.
Use the IEA-provided Affiliate logo on all publications, websites, and promotional materials to clearly and prominently indicate affiliation with the IEA; and adhere to the IEA Affiliate Branding Guidelines.
Provide activities, events, and opportunities for Affiliate members to learn and engage with each other through the Enneagram; create and expand the local and regional Enneagram community.
Encourage participation in IEA global through IEA global membership, accreditation, and attendance at conferences and events. Forward information concerning IEA products and services or requests for volunteer or other assistance to Affiliate local members from time to time as requested by the IEA.
Use best efforts to send up to two representatives to all GAA meetings. For in-person meetings, if travel is not possible, use best efforts and cooperate with IEA to enable virtual participation, including arranging for translation services if needed.
Provide the IEA with up-to-date information concerning Affiliate membership and activities by filing the annual Operations Report in a timely manner.
Annually supply the IEA with the names and email addresses of all Affiliate members for use in IEA communications, notifying members and securing such consents as may be necessary under applicable laws. Affiliates will add a disclaimer to their website indicating that email addresses will be shared with IEA Global when appropriate.
<p>Pay the Annual Affiliate Fee promptly when due:</p> <p><u>\$600</u> Zone 1 – Denmark, Finland, Netherlands, Norway, Sweden</p> <p><u>\$450</u> Zone 2 – Korea, Portugal, Spain</p> <p><u>\$300</u> Zone 3 – Argentina, Brazil, China, Colombia, Egypt, Georgia (Caucasus), India</p> <p><u>\$600</u> Zone 4 – USA: Colorado, Great Lakes, Greater Washington DC, Minnesota, Northeast, Southeast</p> <p>Affiliate can reduce the amount due by earning rebates with global memberships. Rebates are credited against the Annual Affiliate Fee. Rebates for the year cannot exceed the Annual Fee. If rebates earned for the year are less than the Annual Fee, the Affiliate pays the IEA the balance owed. (See Appendix A)</p>
<i>For U.S. Affiliates</i> – Adhere to all legal document content and filing requirements as determined or requested by the IEA and its accountants (necessary to comply with group tax exemption requirements). Provide accurate and timely annual financial and tax reporting information as requested by the IEA, including obtaining any necessary signatures and paying applicable state filing fees.