

## **PSEA EDUCATION COMMITTEE CHARGE AND SOP**

**Scope:** The PSEA Education Committee is tasked with the development, coordination and delivery of PSEA's continuing education programs so they enhance PSEA members' professional skills and comply with IRS CE and NASBA requirements. To maintain consistency among PSEA's educational offerings, members of the committee may also chair some or all of the planning subcommittees.

**Term:** The committee's work commences on July 1 with installation of the new PSEA officers and directors and ends on June 30 of each year.

**Members:** Chair and no less than 2 members

### **Charges & Responsibilities:**

- Review and plan all PSEA educational programming to ensure a high level of quality, consistency and value. Programs should consist of both Federal and state tax education, and address the needs of our seasoned members and our new members.
- Continue ongoing evaluations of all PSEA educational programs and advise the Board of the committee's evaluations.
- Assess concentration of membership across the state and coordinate programs regionally to engage greater member participation in programs offered by the Society.
- Ensure compliance with IRS and other regulatory bodies' continuing education reporting requirements.
- Consider alternate delivery methods such as webinar technology to deliver education in an affordable and convenient manner.
- Upon approval of the Board, the committee is responsible for performing the following activities for all educational events:
  - Contracting with proposed venue for educational events
  - Arranging for qualified speakers on topics of interest to the membership
  - Obtaining IRS program numbers for appropriate continuing education credits
  - Preparing appropriate documents including handouts, evaluations and certificates of completion for distribution to attendees at educational events
  - Uploading attendees' participation to appropriate regulatory agencies such as IRS, etc.
  - Conducting an annual evaluation to determine member needs
- Report all proposed committee recommendations to the PSEA Board for approval prior to implementation.
- Collaborate with any PSEA committees as appropriate to fulfill these charges.
- Refer to the Education Committee SOP for more information on the process.

# **PSEA EDUCATION COMMITTEE SOP**

## **PSEA Education Committee Composition**

The Education Committee is generally comprised of members appointed by the PSEA President. The members should have experience with education programming, whether at the local, affiliate or national level. To maintain continuity in this important committee, two or more members may be carried over from the previous year's committee.

The PSEA Board of Directors (Board) continually seeks to identify members with strong leadership abilities. Participation in this committee is an excellent opportunity for the chair and PSEA members of the Board to evaluate members who demonstrate the requisite skills necessary to serve PSEA in the future in this or another capacity. Please keep this in mind and if a committee member exhibits extraordinary skills, please discuss with the PSEA President.

## **Duties of the PSEA Education Committee**

The Education Committee is a standing committee. Its work builds upon work done by prior committees. It is responsible for the overall oversight of the PSEA educational offerings and operates according to the specific charge given by the President for the current year's committee.

## **Timeline**

The committee's work commences at the start of the new PSEA governance year on July 1. This marks the effective start of the committee's charge, which generally ends when the next committee's charge is effective, approximately one year later.

Shortly after the start of the fiscal year, the committee should convene to discuss its overall charge and specific strategies to achieve the initiatives. Priority is generally given to unfinished projects from the previous year, but that may change depending upon PSEA's education environment and the President's specific charge.

The chair will schedule committee meetings as needed to accomplish its objectives for the fiscal year. The meeting schedule for the committee's work should allow the committee to meet its specific charges in a timely fashion and also be sensitive to the needs of its members. The chair should confirm that the meeting schedule is agreeable to the committee members and will modify it as appropriate. The committee should remain cognizant of any Board plans and intentions in its work. The chair will provide all members of the committee with a schedule of committee meetings and distribute agendas for each meeting.

The chair or a committee member may prepare a draft report of its recommendations for proposed action. Generally, the completed committee report will be distributed to the full committee for comments / revisions before distribution to the Board. The final committee report is then submitted to the Board for approval.

An invitation to the chair is extended when the chair's presence at the Board meeting is required by the President. If the President requests the chair attend a meeting, his / her travel expenses will be reimbursed according to the established reimbursement policies found within the PSEA Policy and Procedures Manual.