

**ORANGE COUNTY CHAPTER CALIFORNIA SOCIETY OF ENROLLED AGENTS
STANDARD OPERATING PROCEDURES - PUBLIC INFORMATION AND AWARENESS PROGRAM**

I. POLICY

- A. It is the policy of the Orange County Chapter to establish, maintain, and administer a Public Information and Awareness Program.

II. PURPOSE

- A. There is a two-fold purpose to the Public Information and Awareness (PIA) Program of the Orange County Chapter (OCEA) of the California Society of Enrolled Agents (CSEA).
 - 1. The first shall be to fully support the Public Information and Awareness Program of CSEA.
 - 2. The second shall be to establish a PIA Program within the Orange County Chapter, to operate within the general geographic area of Orange County by
 - a. increasing public awareness of Enrolled Agents, and
 - b. disseminating relevant information, through various appropriate media within the constraints of available budget, toward this end.

III. APPLICATION

- A. This policy shall apply as follows:
 - 1. Participate in all aspects, at the Chapter levels, in all approved activities to further the goals and objectives of the PIA Program identified by the CSEA PIA Committee.
 - 2. Explore all avenues of information, dissemination, including, but not limited to, newspaper advertising, distribution of media packages to local newspaper business editors, telephone Yellow Page advertising, radio shows, participation at trade shows, maintain exhibits at community college career days.

IV. ADMINISTRATIVE GUIDELINES

- A. Program Development
 - 1. During annual planning retreats, a PIA Committee shall explore courses of action to further the goals and objectives of this program, by making use of the combined talents, comments, and suggestions offered by all participants.
 - 2. Identify a PIA Committee, appoint a Chairperson, and solicit volunteers among the membership to provide time

and effort to implement courses of action determined to be appropriate, timely, and expedient.

B. Duties of the Chairperson

1. Maintain active and continuing contact with the CSEA PIA committee members to establish the roles the Chapter will play in implementing the goals and objectives of the CSEA PIA program.
2. Conduct regular and/or special meetings of the PIA Committee members to establish appropriate courses of action and to follow and to measure progress, as appropriate.
3. Establish a budget appropriate to the tasks identified and planned to be implemented and request budget approval from the Board of Directors.
4. Maintain a complete record of expenditures in accordance with instructions issued by the Board of Directors.
5. Issue regular reports to the Board of Directors in accordance with instructions issued by the Board, report progress of the PIA Committee, and report financial status as required by the Board.
6. Prior to year-end, review the current Standing Operating Procedures (SOP), recommend changes as appropriate, and request authorization for these changes.
7. After authorized changes have been made, submit updated copies to the Chair in charge of SOPs and to the succeeding PIA Chair, together with all correspondence, papers, and records of the Committee.

C. Duties of PIA Committee Members

1. Assist the PIA Chair in all efforts determined to be necessary and/or appropriate to further the goals and objectives of the PIA Committee.
2. Make suggestions, as appropriate, to improve the operations of the Committee, and to identify other areas whereby dissemination of information may be improved or increased, with the ultimate goal of increasing public awareness of Enrolled Agents.

Approved 2001; Amended 8/2005