



AAUW Branch & Affiliate Annual Report Talking Points and Messaging for Member Leaders

Updated April 15, 2026

Executive Summary

AAUW is transitioning the former “branch survey” into the **AAUW Branch & Affiliate Annual Report** to better reflect its role as an official, organization-wide reporting requirement. This change is driven in part due to **new IRS compliance requirements** for affiliate-based organizations, which now require AAUW to collect consistent financial and program information from all affiliates participating in the group exemption.

Beginning this year, the report will include **new financial reporting elements** and will apply not only to branches, but also to **states and other affiliates**. To support these updates, AAUW is also moving to a more robust reporting platform and aligning the timeline with key IRS filing processes.

These changes are essential to **protect AAUW’s group tax-exempt status**, strengthen accountability across the affiliate network, and ensure AAUW can continue operating effectively at both the local and national level. State leaders play a critical role in helping affiliates understand these updates, prepare for reporting, and ensure timely compliance.

Key Messaging and Talking Points for Member Leaders:

Rebrand & Purpose Shift

- The “**branch survey**” is now the “**AAUW Branch & Affiliate Annual Report.**”
- This reflects a **fundamental shift in purpose**:
 - From branding that implies informal feedback (“tell us what you think”)
 - → To an **official reporting requirement** from affiliates.
- Emphasizes that this is **not optional input**, but part of **organizational accountability and compliance**.

Timeline Changes

- Original launch: **April 1**
- New launch: **April 16**
- Reason:
 - Align with **IRS-related processes (990N/group exemption requests)**
 - Allow more time to finalize new requirements
- **Deadline remains June 30**

Major New Requirement: IRS Compliance

- Changes driven by **new IRS rules (effective January 2026; compliance required by January 2027)**.
- Key implication:
 - AAUW must now collect **financial data from affiliates under group exemption**.

New Required Financial Data (for FY ending June 30, 2025):

- Balance Sheet
- Income Statement

Applies to:

- All Affiliates
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Expanded Scope

- Previously: Focused on **branches**
 - Now includes:
 - **Branches**
 - **States**
 - **Other affiliates**
 - Rationale:
 - IRS requirements apply **across the entire affiliate network**
 - Approach:
 - Ask **everyone for baseline info** (to avoid uneven expectations)
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Platform Change

- Moving from **SurveyMonkey → JotForm**
 - Benefits:
 - Allows **file uploads/attachments**
 - More **robust and flexible**
 - Still familiar format (question-based form)
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Content Changes to the Report

New Questions:

- Financial reporting (attaching Balance Sheet and Income Statement)
- Likely:
 - **Program/activity description**
 - To satisfy IRS requirement for documenting activities

Enhancements:

- More **open-ended responses**
 - Ability to **upload supporting materials** (e.g., documents, photos)
 - Aim: balance compliance needs with **flexibility for branches**
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Compliance & Accountability

- This is **not optional** — driven by IRS requirements.

- Key risk:
 - **Noncompliant affiliates jeopardize AAUW's entire group exemption**
 - Consequences:
 - Potential **disaffiliation or disbandment discussions** for noncompliant affiliates
 - Messaging emphasis:
 - Not about "getting rid of branches"
 - About **protecting the entire network**
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Strategic Framing

- Reinforced message:
 - AAUW is a **mission-based affiliate network**
 - Effectiveness depends on **alignment and shared accountability**
 - Goal:
 - Move from **independent silos** → **coordinated national impact**
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Communications Strategy

Multi-channel rollout planned:

- Membership Matters newsletter (monthly)
- State liaison meetings (monthly)
- Webinars:
 - April 15th Webinar Scheduled from 4-5pm ET to provide an overview. All members are welcome to attend.
 - TBD: Training for Finance Officers/Other Member Leaders to explain how to satisfy the financial reporting questions.
- Written guides / "cheat sheets"
- Talking points for leaders (this document)
- Recordings + on-demand materials

Key principle:

- **Same message, multiple formats** (to reach different audiences)
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Anticipated Challenges

- Some branches:
 - Keep **informal financial records**
 - May struggle with new reporting requirements
 - Risk of:
 - Confusion
 - Resistance ("we've never had to do this before")
 - Mitigation:
 - Early communication
 - Clear instructions
 - Examples and templates
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Key Messaging Takeaways (for reuse)

- “This is an **official annual report**, not a survey.”
- “These requirements come from the **IRS, not national preference**.”
- “Compliance protects **all affiliates, not just one branch**.”
- “We are strengthening systems we **should have had in place already**.”

Core Message: Mission-Based Affiliate Organization

- “AAUW is a **mission-based affiliate network** — made up of branches, states, and members.”
 - “Our shared purpose is to be **stewards of that mission**.”
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Why Alignment Matters

- “We are most effective when we are **working together toward a shared goal and purpose**.”
 - “That shared goal is our mission.”
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Impact of Working Together

- “When we are in alignment and **moving in the same direction**, that’s when we can be:
 - Most **effective**
 - Most **impactful**
 - And most **sustainable**”
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Risk of Fragmentation

- “It doesn’t make sense for us to be a network of **700+ entities moving in 750 different directions**.”
 - “If everyone is operating independently, we lose our ability to create **national-level impact**.”
 - “**This is NOT the National office attempting to get rid of branches — it is the opposite**. IRS requirements make compliance with this process mandatory. Non-compliance by one affiliate risks losing the entire group exemption. AAUW branches, states, and affiliates are essential to achieving our mission.”
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Big Picture Framing

- “Our goal isn’t just local impact — it’s to make a difference **both locally and nationally**.”
 - “We can only do that if we are **coordinated and aligned as one network**.”
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Short Version (a repeatable soundbite)

- “AAUW is a mission-based affiliate network, and we are most effective when we are aligned and working together toward that shared mission — not moving in separate directions.”