

**2009-2010**  
**AFFILIATE SERVICES GUIDE**  
June 1, 2009 – May 31, 2010



NATIONAL COUNCIL OF  
TEACHERS OF MATHEMATICS

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## Introduction

Many mathematics organizations across Canada and the United States have a mission similar to the mission of NCTM. NCTM's Mission: *The National Council of Teachers of Mathematics is a public voice of mathematics education, providing vision, leadership, and professional development to support teachers in ensuring equitable mathematics learning of the highest quality for all students.*

By the nature of its position, NCTM has a more public voice, a broader perspective, and a wider scope of activity than its Affiliates, while Affiliates have a specialized perspective to offer at the grassroots level. Whether the organization is geographic or topic-based, each group has a unique role to play in improving mathematics education.

The purpose of the affiliation partnership is to enhance both NCTM's and its affiliated organizations' capacity to build effective relationships within their respective communities. Strong, open relationships with teachers, leaders from schools, parents, legislators, businesses, media, and others are vital to the process of improving mathematics education. By working together through affiliation, we strengthen all our efforts.

This affiliation partnership consists of sharing information, ideas, and efforts through a variety of channels. One important channel is the NCTM Annual Meeting and Exposition, where Affiliates represented at the Delegate Assembly have the opportunity to make recommendations on the Council's activities and initiatives. Other channels include the Affiliate Services Committee, Affiliate Leaders Conference, Affiliate Services at NCTM Headquarters, Affiliate listservs (including the *AffiliateNews* e-newsletter), publications, joint membership efforts, and online Affiliate resources on the NCTM Web site, [www.nctm.org](http://www.nctm.org).

NCTM seeks to provide resources and useful professional support for its members and Affiliates. As part of NCTM's efforts to improve the services and benefits to its Affiliates, in February 1999, a Board-appointed Affiliate Review Team made recommendations about Affiliate services. These recommendations were based on the results of surveys of Affiliate leaders at Leaders Conference and regional caucuses as well as on the long-term needs of Affiliates and NCTM.

This process helped us make broader holistic changes to Affiliate Services. Just as we hope teachers never stop improving their teaching, we plan to continue to assess, reflect on, and improve our services to Affiliates (e.g., Affiliates were surveyed in the fall of 2007).

The pages that follow outline the services and guidelines for 2008–09. Any changes that are made to this program will be communicated to NCTM representatives and other officers as appropriate.

## Categories of Affiliation

There are three categories of affiliation with NCTM. Each type has a different set of criteria, benefits, and structure dues.

Groups with at least 75 members, but fewer than 1500 members, and are not state- or province-level Affiliates may choose to become either a Partner or an Associate Affiliate.

**Associate Affiliates** can take advantage of Level I Services\* from NCTM. This category is for organizations that need basic services from NCTM and is most appropriate for groups with less than 1,500 members that are not state/province-level Affiliates.

**Partner Affiliates** can take advantage of Level I and II Services\* from NCTM. This category is for organizations that want advanced technical support from NCTM.

- All state/province-level mathematics Affiliates may only opt to be Partner Affiliates.
- All Affiliates with 1,500 members or more may only opt to be Partner Affiliates.

**Student Affiliates** can take advantage of Level I Services\* plus additional Student Affiliate benefits\*. This category is for university- or college-based organizations run by and for preservice teachers at the undergraduate or graduate level.

Once a group selects a category at the beginning of the affiliation year (June 1 – May 31) it may not change categories until the next dues cycle. The exception is if an Associate Affiliate wants to become a Partner Affiliate. In this case, the Affiliate will need to pay the difference between the original amount paid and the Partner Affiliate dues rate (without the early payment discount).

\*See Affiliate Services Overview, page 5.

## Affiliation Dues 2009–2010

Annual affiliation dues are for services provided from June 1 to May 31. Dues are nonrefundable. New Affiliates pay dues beginning with their first full year of affiliation (i.e., the affiliation year following the presentation of their charter at the Annual Meeting).

### Early payment discount and late dues

Affiliates that pay dues by March 3, 2009 will receive the listed discounted price. (Dues payment must be postmarked by March 3.) Affiliates that have not paid dues by June 1 will become *Not In Good Standing* (see page 8) and will not be eligible for services until dues are received.

<b>Dues for June 1, 2009 – May 31, 2010</b> (early payment discount deadline— <b>March 3, 2009</b> )						
	<b>Associates</b>		<b>Partners</b>		<b>Student</b>	
<b>Number of Members</b>	Paid by March 3	Paid by June 1	Paid by March 3	Paid by June 1	Paid by March 3	Paid by June 1
Less than 400	\$70	\$90	\$135	\$160	\$50	\$75
400 to 999	\$100	\$135	\$185	\$225		
1000 or more	\$170	\$225	\$270	\$325		

## Affiliate Services Overview

	Student Affiliates	Associate Affiliates	Partner Affiliates
<b>LEVEL I Services</b>			
Unlimited access to the Online Affiliate Resources.	✓	✓	✓
<i>AffiliateNews</i> e-newsletter.	✓	✓	✓
Participation in the Delegate Assembly Process.*	✓	✓	✓
Consignment Program providing the opportunity to make NCTM resources available for Affiliate conferences.	✓	✓	✓
Provision for development support from a sponsoring Partner Affiliate.	✓	✓	✓
Opportunity to attend Affiliate Leaders Conference.	✓	✓	✓
Affiliate Rebates: <ul style="list-style-type: none"> <li>• \$5 for each <b>new</b> NCTM Full Individual and E-Membership</li> <li>• \$3 for each NCTM Full Individual and E-Membership <b>renewal</b></li> </ul> (Details on page 18.) Note: Rebates do not apply to student, emeritus (formerly retired), and K-8 memberships.	✓	✓	✓
Consulting services of the Affiliate Services staff through personal contact, e-mail, and telephone.	✓	✓	✓
NCTM membership promotional materials.	✓	✓	✓
Apply for appropriate Affiliate grant: <ul style="list-style-type: none"> <li>▪ <b>Partner</b> Affiliate - Kenneth B. Cummins Grant (maximum of \$3,000)</li> <li>▪ <b>Associate</b> Affiliate Grant (maximum of \$2,000)</li> <li>▪ <b>Student</b> Affiliate Grant (maximum of \$1,500)</li> </ul>	✓	✓	✓
<b>LEVEL II Services</b>			
Assistance from an Affiliate Services Committee representative and NCTM Affiliate Services through e-mail, telephone, and personal contact.			✓
Opportunity to host NCTM professional development programs such as regional conferences and Learn↔Reflect Strand.			✓
Opportunity to meet with Affiliate Services Committee representative at state/provincial Affiliate board meetings.			✓
Listed in NCTM Regional Conference and Exposition Program Book			✓
Eligible to participate in the NCTM Affiliate Leadership Circle Program.**			✓
Community/Government Relations/Advocacy support from NCTM.			✓
Discounted exhibit booth space at NCTM Annual Meeting and Exposition and Regional Conferences and Expositions.			✓
<b>Additional Student Affiliate Services</b>			
\$50 NCTM gift certificate sent annually to the faculty advisor.	✓		
\$50 NCTM gift certificate sent annually to the Affiliate.	✓		

\*See page 19 for Delegate Assembly FAQ

\*\* See page 14 for Leadership Circle details

## Criteria for New Affiliates

Organizations that are granted affiliation with NCTM must meet the following criteria:

1. Purpose/mission that is aligned with the mission and goals of NCTM.
2. Membership base of at least 75 members (10 for Student Affiliates). Groups that affiliated with NCTM prior to January 2001 may have fewer members.
3. Plans for Affiliate and NCTM membership development.
4. Sponsorship by a state-level mathematics organization (see below). A new Affiliate-at-Large may prefer to have a Partner Affiliate-at-Large serve as its sponsor.
5. Commitment to maintain year-round access to the Internet and e-mail for the president and NCTM representative.
6. An active commitment to a community service project such as tutoring (Student Affiliates only).
7. A set of governing rules that meet the following conditions:
  - Organization name reflecting geographic location if appropriate.
  - A clearly stated purpose/mission.
  - Nonrestrictive membership clause providing for the involvement of all persons interested in the purposes of the organization and mathematics education (see below).
  - The continuity (i.e., staggered terms of office) of elected and appointed leaders to ensure stability of the organization.
  - An NCTM representative who serves as the primary link between NCTM and the Affiliate. This position must be held by a current individual member of NCTM.
  - The president of the organization is a current individual member of NCTM.
  - The faculty advisor of a Student Affiliate is a current individual member of NCTM.
  - A dissolution clause that clearly takes care of excess funds in the event of dissolution of the organization.

### **Sponsorship**

State-and Province-level Affiliates are being asked to move into sponsorship roles to provide guidance and support to new Associate and Student Affiliates in their state. Affiliate sponsors are expected to encourage Affiliates to work collaboratively in their state, province, or within their area to provide statewide/province-wide mathematics education leadership. Organizations applying for affiliation will need to have their state- or province-level Affiliate agree to sponsor them before their application is reviewed. Affiliates-at-Large may want to have a sponsor with similar interests, make-up, or location. Sponsorship implies no financial obligation but does imply a mentoring or advisory role as needed.

### **Non-restrictive membership**

No Affiliate may require membership in another organization as a prerequisite for membership in the Affiliate, and no Affiliate may deny membership to individuals on the basis of race, sex, creed, or national origin. In exceptional circumstances, an Affiliate may be accepted whose membership is restricted by factors other than those listed.

## Affiliation with NCTM

To maintain affiliation with NCTM, an Affiliate—

1. pays affiliation dues;
2. keeps NCTM informed of any changes in officers' names or addresses, terms, membership dues, and other essential Affiliate information;
3. has its president maintain current individual membership in NCTM throughout his/her term of office;
4. has its NCTM representative maintain current individual membership in NCTM throughout his/her term of office;
5. meets all consignment obligations;
6. files an annual report;
7. maintains an approved constitution and bylaws and submits copies of amended constitution and bylaws with amendments highlighted to NCTM Affiliate Services;
8. participates in the Delegate Assembly process;
9. promotes membership in NCTM;
10. promotes NCTM by informing Affiliate members about NCTM's programs, conferences, and publications;
11. answers requests for information from NCTM promptly;
12. maintains year-round access to the Internet and e-mail for the president and NCTM representative;
13. maintains relationships with other Affiliates within the state, province or region as applicable;
14. participates or sends representatives to any organized assembly of NCTM when invited (e.g., Affiliate leaders conference);
15. provides ongoing support to Associate Affiliates and Student Affiliates within state, province or region as applicable (Partner Affiliates only).

## An Alternative to Affiliation with NCTM

In establishing an organization whose mission advances mathematics education, the leaders may wish not to affiliate with NCTM. An autonomous structure may better serve the purposes for which that group was organized. There are three strong alternative support systems available to groups not affiliating with the Council:

- **Individual NCTM membership**—Your organizations can be well connected with the issues of mathematics education through individual membership in NCTM (journals, *NCTM News Bulletin*, and so on).
- **Affiliation with state/provincial level mathematics organizations**—Please contact your state organizations for additional information.
- **Online Affiliate resources**—The NCTM Web site serves as a rich resource of organizational support for groups that share NCTM's mission.

## **Affiliation Status**

An Affiliate's Affiliation Status\* can be either *In Good Standing*, *Not in Good Standing*, or *Eligible to have Charter Withdrawn*. Below is an explanation of what these mean.

### ***Good Standing***

An Affiliate is considered to be *In Good Standing* if it has—

- paid its dues for the current affiliation year;
- up-to-date officer records on file at NCTM Headquarters;
- a president who is a current individual member of NCTM and remains a current member throughout the term of office;
- an NCTM representative who is a current individual member of NCTM and remains a current member throughout the term of office;
- met all consignment obligations.

### ***Not in Good Standing***

If any one of the five criteria listed above is not met at any given time, an Affiliate is considered to be *Not in Good Standing* and is not eligible for services until it regains the *In Good Standing* status.

Dues must be paid by June 1 or the status of an Affiliate changes to *Not In Good Standing*. The Affiliate Profile Sheet shows when the next affiliation dues are due. The renewal of affiliation notice is mailed to Affiliates annually, usually in January.

Affiliates that have not updated officer records by the end of the month that the officer terms expire become *Not In Good Standing* the first day of the following month. One month before a president's term ends, he/she receives a request for a new list of officers and an annual report. Officer information can be e-mailed, mailed, faxed, or submitted online at [www.nctm.org/affiliatecommunications.aspx](http://www.nctm.org/affiliatecommunications.aspx). See also "*Communicating with NCTM*" on page 14.

Please provide your officers' NCTM membership numbers to expedite processing this aspect of affiliation criteria.

NCTM e-mails monthly reminders to those Affiliates *Not in Good Standing*.

### ***Eligible to have Charter Withdrawn***

If any one of the five criteria noted above as *In Good Standing* status is not met for six months, an Affiliate is considered to be *Eligible to have Charter Withdrawn* and is not eligible for services until the issue is resolved.

\*An Affiliates Affiliation Status is indicated at the top of each Affiliate Profile Sheet (provided whenever any change is made or upon request).

## **Withdrawal of Charter**

If an Affiliate becomes one year behind in either payment of affiliation dues or officer updates, its charter is eligible to be withdrawn. (Since June 1, 2003)

The Affiliate's NCTM representative and president will be notified of the Affiliate's *Eligible to have Charter Withdrawn* status. Groups will be contacted approximately 90 days before the charter is officially withdrawn. A letter is sent by delivery confirmation mail to all officers on record for the Affiliate.

Once an Affiliate's charter is withdrawn, the Affiliate must reapply for affiliation using the current criteria. If reinstated, the Affiliate will regain its original charter number.

## **Role of the NCTM Representative**

The NCTM representative is a member of an Affiliate and a current individual member of NCTM. This Representative is either appointed or elected to serve as the primary contact for the Affiliate and for NCTM, thus enhancing the affiliation partnership.

The term of office for the NCTM representative should be similar to that of other officers of the Affiliate. When possible, a training year shared by the incoming and outgoing NCTM representatives affords the opportunity for a smoother transition.

The NCTM representative either does, or ensures that the following are done:

1. Promotes membership in NCTM;
2. Communicates information on NCTM activities;
3. Is knowledgeable about NCTM services available to NCTM Affiliates by regularly checking the online Affiliate resources;
4. Provides NCTM Headquarters updated lists of Affiliate officers, dates for the Affiliate's professional development activities, and membership lists;
5. Follows correct procedures for ordering and selling NCTM educational materials on consignment;
6. Maximizes communication with the Affiliate Services Committee (ASC) representative in order to enhance the partnership between NCTM and the Affiliate;
7. Maximizes communication with the Affiliate's members about NCTM (e.g., NCTM membership information, NCTM publications, conferences, and other professional development opportunities);
8. Coordinates Affiliate's involvement in the Delegate Assembly;
9. Promotes the NCTM Affiliate Leaders Conference to the Affiliate leaders;
10. Communicates effectively with NCTM Headquarters and the ASC representative through a variety of means including, but not limited to, e-mail, fax, phone, and Web;
11. Encourages and works with the Affiliate president to submit the annual report;
12. Submits to NCTM Affiliate Services copies of amended constitution/bylaws with amendments highlighted.

### **Suggested Activities**

- Request membership brochures and catalogs.
- Promote the availability of the online application and renewal form for NCTM membership (see Affiliate Rebate Program on page 18).
- Be fully cognizant of the Affiliate's position on Delegate Assembly resolutions and report back to the Affiliate on the disposition of the resolutions.

### **Resources Available to NCTM Representatives**

- The Affiliate Services department's staff will supply representatives with brochures, educational materials catalogs and other promotional materials.
- Affiliates can render an important and valuable service to their members by providing the opportunity for them to examine and purchase NCTM educational materials at meetings and conferences. Consignment guidelines and relevant forms are available online.
- Online Affiliate resources provide support for the NCTM representative's work.

## Committee Support to Affiliates

(Charge revised July 2004)

The Affiliate Services Committee (ASC) is charged to promote the mission and goals of NCTM by—

1. serving as a liaison between Affiliates and NCTM, working primarily with and through Partner Affiliates;
2. supporting and encouraging Affiliate activities that promote the goals of NCTM;
3. identifying and developing leaders of mathematics education;
4. encouraging membership in NCTM and Affiliates;
5. encouraging collaboration among Affiliates within a state/province;
6. supporting the development of Student Affiliates that promote the goals of NCTM;
7. overseeing the Resolutions process, including the planning and facilitation of the Regional Caucuses and Delegate Assembly;
8. preparing an annual report for the Board of Directors, including a budget request for the committee.

ASC representatives are appointed to a three-year term by the NCTM president. Two representatives are assigned to each of four regions – Central, Eastern, Southern and Western and one representative is assigned to the Canadian region. Regional assignments are as follows:

Canadian	Alberta, British Columbia, Manitoba, Saskatchewan, New Brunswick, Newfoundland, Nova Scotia, Ontario, Prince Edward Island, Quebec
Central 1	Illinois, Indiana, Kentucky, Michigan, Ohio
Central 2	Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota, Wisconsin
Eastern 1	Connecticut, Maine, Massachusetts, New Hampshire, New York, Rhode Island, Vermont
Eastern 2	Delaware, District of Columbia, Maryland, New Jersey, Pennsylvania, West Virginia
Southern 1	Bermuda, Florida, Georgia, North Carolina, Puerto Rico, South Carolina, Virgin Islands, Virginia
Southern 2	Alabama, Arkansas, Louisiana, Mississippi., Oklahoma, Tennessee, Texas
Western 1	Alaska, Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming
Western 2	California, Guam, Hawaii, Oregon, Washington

Please note: ASC focuses on making personal contact by telephone, e-mail, or by attending the board meetings of Partner Affiliates in the region when appropriate or feasible.

Personal contacts allow the ASC representatives to learn more about the current priorities of the organizations, to meet officers at a time when they are less distracted (than they might be at a conference), to gather information so that NCTM can improve support to Affiliates, and to have an opportunity to share information about current NCTM initiatives.

ASC representatives are in contact with Affiliate leaders via e-mail on an ongoing basis. Names of current ASC representatives can be found online at [www.nctm.org/asc.aspx](http://www.nctm.org/asc.aspx).

## Online Affiliate Resources

The Affiliate section of the NCTM Web site is designed specifically for leaders of NCTM's Affiliates and is considered a primary resource for Affiliate leaders. The online Affiliate resources provide Affiliates with information on maintaining *In Good Standing* status, services available to Affiliates, forms, and archived information. This section continues to be updated and expanded.

It is important that we receive feedback from Affiliate leaders about the content and organization of the online Affiliate resources so that we can better serve our Affiliates. Please e-mail feedback to [affiliates@nctm.org](mailto:affiliates@nctm.org).

## AffiliateNews Service

*AffiliateNews* is an electronic newsletter that provides timely information and updates to Affiliate leaders.

The distribution list for each issue of *AffiliateNews* is generated from our current Affiliate officer records. *AffiliateNews* is automatically e-mailed to up to nine current officers of each Affiliate who have e-mail addresses on file with NCTM. Copies of the current issue and a limited number of back issues of *AffiliateNews* are available online at [www.nctm.org/affiliatenews.aspx](http://www.nctm.org/affiliatenews.aspx).

Each Affiliate's NCTM representative and president should have access to e-mail and the Internet. Please be sure your officers' e-mail addresses are kept current with NCTM.

## Affiliate Leaders Conference

Affiliate leaders conference is for officers and potential leaders of Affiliates. The conference agenda is designed for—

- (a) the strengthening of Affiliate leadership capacity to help Affiliates better meet the challenges they face.
- (b) the exchange of information, ideas, and efforts to enhance the partnership between NCTM and its Affiliates.
- (c) the sharing of strategies to sustain and build membership.

Detailed conference information and registration forms will be available online and will be included in the *AffiliateNews* and (made available) at the Delegate Assembly.

## Grants to Affiliates

### **Partner Affiliate Grant: Kenneth B. Cummins Grant (\$3,000 maximum)**

The Kenneth B. Cummins Fund is the result of contributions initially donated to NCTM's Mathematics Education Trust (MET) by Dr. Cummins and the Ohio Council of Teachers of Mathematics. Dr. Cummins was an outstanding mathematics educator from Ohio and the award is to be given to (an) exceptional Partner Affiliate grant proposal(s).

### **Associate Affiliate Grant (\$2,000 maximum)**

The Mathematics Education Trust (MET) Associate Affiliate Grant is an award up to \$2000 for an exceptional grant proposal.

### **Student Affiliate Grant (\$1,500 maximum)**

The Mathematics Education Trust (MET) has approved a grant for projects from NCTM Student Affiliates. The grant will be awarded in an amount up to \$1500.

### **Purpose**

The purpose of a MET-funded grant is to support efforts of the Affiliates to serve mathematics teachers by—

- building membership and revenues;
- promoting creative projects that help make NCTM and its Affiliates be more visible to the public and educational partners; or
- supporting the strategic priorities of the National Council of Teachers of Mathematics.

Based on the recommendation of the Affiliate Services Committee (ASC), the Mathematics Education Trust (MET) Board of Trustees, may award the appropriate grant to a Partner Affiliate, Associate Affiliate, and Student Affiliate.

### **2009-2010 Grants**

The 2009-2010 NCTM Affiliate Grant Guidelines and Application are available online, were mailed to each Affiliate in January 2009, and grant information is included in the *AffiliateNews*.

**The deadline for submitting a 2009-2010 grant application is June 1, 2009. All applications must be postmarked no later than June 1, 2009.**

## **Affiliate Consignment Program**

One of the many services available to NCTM Affiliates is the ability to order NCTM products on consignment. Consignments provide Affiliates with the opportunity to make NCTM resources available to their own members at their own events.

### **Three Ordering Options**

#### **A. Sample Consignments**

Affiliates that sold less than \$800 of materials (onsite and special orders combined) from their last consignment for a similar event will receive one of two Sample Consignments. A **Small Sample Consignment** will include NCTM catalogs and Special Order forms for items purchased from the catalog. These Special Orders will be shipped from NCTM directly to the purchaser. This consignment is appropriate when the expected attendance is less than 75. The **Standard Sample Consignment** will also include samples of our top-selling educational materials and special products. The Affiliate may then take Special Orders from their members for products on display as well as for items in the NCTM Educational Materials Catalog (see "Exclusions" below). The Affiliate may choose to sell the samples at the end of the event or return them. Sample Consignments are available to any Affiliate that is "In Good Standing."

#### **B. Regular Consignment**

Affiliates that sold \$800 or more of materials from their last consignment for a similar event may receive a Regular Consignment. A Regular Consignment is when multiple copies of top-selling products are sent to sell onsite. The Affiliate has an opportunity to review the list of items and quantities that will be sent and can suggest changes. Unsold products are then returned to NCTM at the end of the event for a credit.

Note: A 10% special rebate will be given to the Affiliates for all Special Orders processed (i.e., orders shipped from NCTM) for both Sample and Regular Consignments.

#### **C. Quantity Discount Purchase**

The purpose of this option is to enable Affiliates to purchase specific quantities of specific products at a 30% discount. This option is limited to orders over \$400 (at the 70% pricing) and the expectation is that products will not be returned as they are in a consignment (see below).

For example, an Affiliate may need multiple copies of a particular NCTM book that will be given to all participants in a workshop that the Affiliate is hosting. The Affiliate can purchase these books at 70% of the full retail price of the products. Any returns for full refund must be made within 30 days of the original order. Return shipping for quantity discount orders is paid for by the Affiliate.

These orders may be paid with a credit card when the order is placed or the Affiliate can be billed for the order.

#### **Affiliate Purchase Price**

The Affiliate pays 70% of full retail price of all educational materials and special products sold. The value of sold products is calculated by NCTM as the difference between the value of products sent and the value of products returned.

#### **Shipping Costs**

NCTM covers the cost of outbound and return shipping for Sample and Regular consignment orders. The Affiliate reports the cost of shipping in the sales report and will get this amount credited to the final bill. For Quantity Discount Purchase, any return shipment costs are paid by the Affiliate.

For specific guidelines on this program, sample timeline, and the request form, go to [www.nctm.org/affiliateconsignments.aspx](http://www.nctm.org/affiliateconsignments.aspx) or contact [consignments@nctm.org](mailto:consignments@nctm.org).

# NCTM AFFILIATE LEADERSHIP CIRCLE



## NCTM Affiliate Leadership Circle

### PROGRAM DESCRIPTION

- **Who?** All NCTM Partner Affiliates “In Good Standing” are invited to participate.
- **What?** The program is designed to highlight the participation of Partner Affiliate leaders and members in the Council’s activities.
- **When?** Annually, by February 1, for recognition at the next annual meeting following the February deadline, an Affiliate will make available to NCTM its membership information.
- **How?** E-mail to [affiliates@nctm.org](mailto:affiliates@nctm.org) a spreadsheet that includes either (a) first name, last name, and complete mailing address of each member of the Affiliate **or** (b) last name and ZIP code of each member of the Affiliate.

### Criteria for Recognition

To be eligible for recognition in the *NCTM Affiliate Leadership Circle*, a Partner Affiliate must submit its membership list to the NCTM Headquarters Office (see How? above), where the percent of NCTM members will be determined (i.e., identified and verified).\* An Affiliate can qualify for one of three recognition levels based on the percent of its members who are also current members of NCTM. The levels and the minimum percent for each recognition level are as follows: SILVER (35%), GOLD (50%), and PLATINUM (65%).

### Benefits to Affiliate

The NCTM Affiliate Leadership Circle recognition status is awarded for a three-year period beginning at the award ceremony held at the Delegate Assembly. An Affiliate may re-apply in any subsequent year if it believes that its recognition level has changed. The benefits to the Affiliate for each recognition level follow:

**ALL THREE LEVELS:** Each Affiliate will receive—

- Recognition at the Delegate Assembly each year of membership
- Recognition in the NCTM annual meeting’s *Daily News*
- Recognition in the *NCTM News Bulletin*
- Recognition on the NCTM Web site
- Recognition in the *AffiliateNews*
- An article written by the NCTM president for publication in the NCTM Affiliate Leadership Circle member’s newsletter in each year of membership

**SILVER:** Each qualified Affiliate will receive—

- A three-year certificate of NCTM Affiliate Leadership Circle **SILVER** membership

**GOLD:** Each qualified Affiliate will receive—

- One complimentary registration to Affiliate Leaders Conference for each of the three years of **GOLD** level NCTM Affiliate Leadership Circle membership
- A three-year certificate of NCTM Affiliate Leadership Circle **GOLD** membership

**PLATINUM:** Each qualified Affiliate will receive—

- A banner showing NCTM Affiliate Leadership Circle **PLATINUM** membership
- Two complimentary registrations to Affiliate Leaders Conference for each of the three years of **PLATINUM** level NCTM Affiliate Leadership Circle membership
- A three-year certificate of NCTM Affiliate Leadership Circle **PLATINUM** membership

*\*Note: Membership lists submitted for this program will be used **only** for NCTM membership analysis.*

## Communicating with NCTM

The Affiliate Services department stands ready to assist you with keeping officer records up to date, submitting your conference dates, keeping your Affiliate *In Good Standing*, and responding to your Affiliate's questions and concerns.

### Officer Information

Affiliation can offer organizations few benefits when outdated officer information is on file with NCTM. That is why we offer four different ways to send us information and why we always send a confirmation of the new information within two weeks.

Before the end of the month that one or more officer terms expire, an Affiliate must submit new officer information to NCTM Affiliate Services. Beginning in the month following the term expiration date, Affiliates without current information on file are considered *Not in Good Standing*.

NCTM Affiliate Services maintains information for up to nine officer positions within an Affiliate. The asterisk (\*) indicates the officer positions that are required.

- NCTM Representative \*
- President \*
- Treasurer \*
- Faculty Advisor\*(Student Affiliate only)
- Editor – Newsletter and/or Journal
- Community Relations Representative
- Membership Chair
- Executive Director/Executive Secretary
- President-Elect

There are several options for submitting Affiliate officers' information. However, use of the online submission form is preferred. Please make sure the officer term expiration dates and e-mail addresses are included.

How to submit officer information:

1. E-mail – [affiliates@nctm.org](mailto:affiliates@nctm.org)
2. Fax – (703) 476-2970
3. Online – [www.nctm.org/affiliateofficer.aspx](http://www.nctm.org/affiliateofficer.aspx)
4. Mail – NCTM Affiliate Services  
1906 Association Drive  
Reston, VA 20191-1502

### Conference Dates

NCTM maintains a list of Affiliate conference dates online at [www.nctm.org/affiliateconferences.aspx](http://www.nctm.org/affiliateconferences.aspx). The list is continually updated. All Affiliate conference information should be submitted to Affiliate Services as soon as it is available. See the submission form at [www.nctm.org/affiliateconferenceform.aspx](http://www.nctm.org/affiliateconferenceform.aspx).

### NCTM Mailings

To maximize communication, every mailing to an Affiliate is sent to the NCTM representative and the executive director/secretary, or faculty advisor on record.

### Look for Confirmation

Each time a change is made to your Profile Sheet, an electronic copy of the changes is sent to the NCTM representative for review.

If you have submitted changes or paid annual dues but have not received a confirmation, please contact Affiliate Services immediately at [affiliates@nctm.org](mailto:affiliates@nctm.org).

**Submitting New Officer Information and Annual Report**

Before the end of the month that current officer terms expire, an Affiliate's responsibility is to submit the following to the NCTM Affiliate Services department:

- New officer information. (The president and NCTM representative must be current members of NCTM.)
- An annual report. The president is responsible for submitting this report to NCTM either the month before his/her term ends or on the anniversary of his/her term (if a president's term is more than one year). An online submission form is available.

These forms are available online in the Affiliate section of the NCTM Web site at [www.nctm.org](http://www.nctm.org).

## Important NCTM Affiliate Dates 2008–2010

### 2008–2009

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- January 15, 2009   ★ Call for 2009 **Delegates**—mailed and posted  
◆ 2009–10 Affiliate **Grants** Guidelines and Applications—mailed and posted  
● 2009–10 **Renewal** of Affiliation dues notice—mailed and posted  
■ 2009–10 **Affiliate Services Program**—mailed and posted
- February 1, 2009   ▲ Deadline to submit membership list for 2009 **Leadership Circle Program**
- March 3, 2009   ● Deadline for Early Payment Discount of 2009–10 **Renewal** of Affiliation dues  
★ Deadline for Affiliate to register 2009 **Delegates**  
★ Delegate Packet mailed to registered **Delegates**
- April 22–25, 2009   ★ NCTM **Annual Meeting** and Exposition: Washington, DC
- April 22, 2009   ★ **Regional Caucuses**: Grand Hyatt Washington Hotel, Washington, DC
- April 23, 2009   ★ **Delegate Assembly**: Grand Hyatt Washington Hotel, Washington, DC

### 2009–2010

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- June 1, 2009   ● Deadline for 2009–10 **Renewal** of Affiliation dues  
◆ Deadline to submit Affiliate **Grant** Application
- July 24–26, 2009   ◀ 2009 Affiliate **Leaders Conference**: New Orleans, Louisiana
- September 1, 2009   ★ Call for 2010 Proposed **Resolutions**—mailed and posted
- November 2, 2009   ★ Deadline to submit 2010 Proposed **Resolutions**
- January 15, 2010   ★ Call for 2010 **Delegates**—mailed and posted  
◆ 2010–11 Affiliate **Grants** Guidelines and Applications—mailed and posted  
● 2010–11 **Renewal** of Affiliation dues notice—mailed and posted  
■ 2010–11 **Affiliate Services Program**—mailed and posted
- February 1, 2010   ▲ Deadline to submit membership list for 2010 **Leadership Circle Program**
- March 3, 2010   ● Deadline for Early Payment Discount of 2010–11 **Renewal** of Affiliation dues  
★ Deadline for Affiliate to register 2010 **Delegates**  
★ Delegate Packet mailed to registered **Delegates**
- April 21–24, 2010   ★ NCTM **Annual Meeting** and Exposition: San Diego, California
- April 21, 2010   ★ **Regional Caucuses**: San Diego, California
- April 22, 2010   ★ **Delegate Assembly**: San Diego, California

# Affiliate Rebate Program

## New Process—Effective June 1, 2008

Beginning June 1, 2008, the Affiliate Rebate Program was revised to centralize the collection of NCTM dues payments and redirect the efforts of NCTM Affiliates towards promotion of the program, rather than administrative and financial management. NCTM now encourages Affiliates to promote the availability of the online application and renewal form for NCTM membership and to discontinue the collection of NCTM dues payments.

### **How It Works:**

- Any individual who joins or renews membership online will be given the option to select an Affiliate to receive the rebate.
- Only one Affiliate may be selected on the form for the rebate. The list shows only those Affiliates in the individual's state, as well as multi-state and at-large Affiliates.
- Affiliates will not be required to verify an individual's membership status in the Affiliate for this program. Rebates will be provided to Affiliates from any individual who selects them on the online application or renewal.
- Rebate amounts:
  - \$3 for renewing full and e-members
  - \$5 for new full and e-members
- Existing business rules will apply to lapsed members who return to NCTM. Currently, an individual is considered new after one year of non-membership in NCTM.
- Multi-year rebates will be provided on multi-year memberships (i.e. a 3-year membership renewal will result in a \$9 Affiliate rebate).
- No rebates will be provided for Emeritus, Student, Institutional, or K-8 school memberships.
- Rebates will be submitted to Affiliates on a quarterly basis. NCTM will discontinue rebates for any dues collected directly by NCTM Affiliates.

We look forward to working with Affiliates on this new Rebate Program.

## Frequently Asked Questions about the Affiliate Program

**Q: Why does NCTM have different categories of affiliation?**

A: The 230+ Affiliates of NCTM generally range in membership size from 10 to 8,000. This means that there is a wide variety of needs represented. Having different options for affiliation enables the Council to enhance its assistance to groups. Smaller organizations should work collaboratively with organizations in their state or province so that all resources on the state level are maximized. (Page 4)

**Q: Can a state or province-level Affiliate choose to become an Associate Affiliate?**

A: No. State and provincial level organizations have a unique role to play in a state/province. The structure in place allows NCTM to enhance and target its organizational development assistance. (Pages 4 and 6)

**Q: When are affiliation dues due?**

A: In order to take advantage of the early payment discount, renewal of affiliation dues payment must be postmarked no later than March 3. After March 3, the regular rate for dues must be paid by June 1 to remain *In Good Standing* and have access to all services. (Page 4)

**Q: Why would my Affiliate want to sponsor a new Affiliate?**

A: Agreeing to sponsor a new Affiliate is an opportunity to provide leadership and support to new Affiliates in the state/province and to enhance everyone's efforts to improve mathematics education. Level II Services for Partner Affiliates listed on page 5 will help position an Affiliate to take on this role. These services include grants, training, and consultant services from the Affiliate Services Committee. Affiliate leaders need to be certain that there is an appropriate role for an additional Affiliate in their state/province.

**Q: Why should a new Affiliate need a Partner group to sponsor them?**

A: A Partner Affiliate has information about activities and programs that have been successful, and can ensure that a new organization is connected to state or provincial efforts to improve mathematics education. (Page 6)

**Q: Why is there a minimum membership level for new Affiliates?**

A: With the development of the Online Affiliate Resource Center, smaller groups will be better served by making use of the information and ideas available on the Online Affiliate Resource Center and tapping into the state- or province-level Affiliate in their early development stages. Once a group has established a strong membership and leadership base, they may decide to affiliate with NCTM. (Pages 6 and 7)

**Q: Why do you list an Alternative to Affiliation?**

A: We want to be sure that organizations understand that they do not have to be an Affiliate of NCTM in order to fulfill their mission. NCTM has very limited resources and with the exception of Student Affiliates, is not actively seeking new Affiliates at this time. (Page 7)

**Q: Why do all NCTM representatives and Affiliate presidents have to be Individual Members of NCTM?**

A: As leaders of NCTM's partner organizations, it is critical that the people who hold these positions be committed to NCTM and their own professional development. Affiliate leaders will receive the same communication as other NCTM members and will have a personal commitment to the organization through their membership. (Pages 6-7)

**Q: If my organization is an Associate Affiliate, can we still contact the Affiliate Services staff at NCTM Headquarters for assistance?**

A: Absolutely. The NCTM Affiliate Services staff is available by phone, (703) 620-9840, ext. 2104, and e-mail, [affiliates@nctm.org](mailto:affiliates@nctm.org). (Page 15)

**Q: Will I need a password to use the Online Affiliate Resource Center?**

A: Not at this point in time. The Resource Center is accessible to all groups whether they are affiliated with NCTM or not. All you need is access to the Internet. (Page 11)

**Q: Will I be able to search for information about an Affiliate Grant online at the Online Resource Center?**

A: Yes. You can also access information on previous grants. (Page 12)

**Q: Which Affiliates are eligible for a grant?**

A: Only Partner Affiliates are eligible for a grant but Associate and Student Affiliates are encouraged to collaborate with Partner Affiliates. (Page 12)

**Q: How do we know that officer changes or dues have been received by NCTM Headquarters?**

A: Each time changes are received at NCTM Affiliate Services, you should receive an e-mail confirmation within 1-2 weeks. If not, please contact NCTM Affiliate Services. (Page 15)

**Q: When does an Affiliate become *Not in Good Standing*?**

A: If at any time any one of the following criteria is not met, an Affiliate's status becomes *Not in Good Standing*.

- Officer information for all officers is current.
- Affiliation dues are current. Dues are paid by June 1 of each year for the next fiscal year. NCTM's fiscal year is June 1 to May 31.
- The Affiliate's president is a current member of NCTM throughout his or her term of office.
- The NCTM representative is a current member of NCTM throughout his or her term of office.
- All consignment obligations have been met. (Pages 7 and 8)

Additional questions should be referred to NCTM Affiliate Services staff at [affiliates@nctm.org](mailto:affiliates@nctm.org) or your Affiliate Services Committee representative.

# The Delegate Assembly of the National Council of Teachers of Mathematics—FAQ

## **Q. What is the Delegate Assembly?**

A. The Delegate Assembly is NCTM's formal structure for Affiliates to make recommendations about mathematics education issues or Council operational issues.

## **Q. When does it occur?**

A. The Delegate Assembly is held at every NCTM Annual Meeting and Exposition. The time and day may vary somewhat from year to year to try to accommodate as wide a variety of Affiliate officers as possible.

## **Q. Who can participate?**

A. In January of each year, the president and the NCTM representative of each Affiliate are invited to appoint one delegate and one alternate delegate to represent the Affiliate. Both can attend although only one person can vote. The delegate and alternate delegate positions must be held by current individual members of NCTM. Only Affiliates *In Good Standing* can participate in the Delegate Assembly.

## **Q. What is the procedure for our Affiliate to have a proposed resolution be brought before the Assembly?**

A. Affiliates are sent a Call for Resolutions in the fall of each year. Proposed resolutions should be submitted to NCTM Affiliate Services by November 1. Affiliates are encouraged to work with their Affiliate Services Committee (ASC) representative in submitting proposed resolutions to ensure that everything is in order.

## **Q. What happens once the proposed resolution is submitted?**

A. Proposed resolutions are reviewed by the ASC. A proposed resolution can be referred (i.e., referred to another NCTM committee or to the Headquarters Office) or it can be presented to the Delegate Assembly. The ASC can also choose to return the proposed resolution to the Affiliate for more clarification. The deadline for submitting proposed resolutions to NCTM Affiliate Services is November 1.

## **Q. What happens when a proposed resolution is referred to an existing committee or Headquarters?**

A. Often topics or issues raised in proposed resolutions are currently under discussion or have already been addressed by some entity within NCTM (e.g., a committee, task force, or the NCTM Headquarters Office). Such proposed resolutions are referred to the appropriate Council entity for a response. Responses are sent to the submitting Affiliates and also to other Affiliates and officers of NCTM.

## **Q. What happens when a proposed resolution is referred to the Delegate Assembly?**

A. This means that the topic/issue of the proposed resolution is either currently not being addressed by NCTM or the topic/issue deserves more attention. The delegates then have the opportunity to decide if further action is desired.

## **Q. Why would a proposed resolution be returned to an Affiliate?**

A. If a proposed resolution is submitted that is not clear in its intent or rationale, the ASC returns the proposed resolution with questions and recommendations for improvement.

## **Q. Can a proposed resolution that has been referred be brought to the floor of the Delegate Assembly?**

A. Yes, *any* proposed resolution can be brought to the floor if *any* Affiliate (not just the Affiliate who submitted the proposed resolution) is unhappy with the response, would like to suggest revisions to the proposed resolution, or would simply like to have the delegates vote on a particular issue.

## **Q. Is there an opportunity for Affiliate leaders to discuss issues raised in proposed resolutions?**

A. Yes. Regional Caucuses are held prior to the official start of the Annual Meeting and Exposition, and always *before* the Delegate Assembly. Regional Caucuses are an opportunity for delegates and alternates to meet informally to discuss and revise current proposed resolutions. ASC representatives preside over these two-hour sessions and the NCTM Board of Directors can participate.

## **Q. What happens if our Affiliate has a proposed resolution after the November 1 deadline?**

A. At most, one proposed resolution can be adopted by each caucus and presented to the Delegate Assembly. A resolution brought in this manner must be accompanied by a rationale and supporting evidence.

## **Q. What happens to resolutions that are passed by the Delegate Assembly?**

A. Following the Delegate Assembly, passed resolutions will be posted online in the Affiliate Online Resource Center. Resolutions that are passed are referred to the NCTM Board of Directors for consideration. The Board then acts on each resolution as it deems appropriate. Board actions will be posted online by September 30. Affiliate leaders will be notified through the *AffiliateNews* e-newsletter when actions have been posted. The Board's actions on resolutions will also be printed in a fall issue of the *NCTM News Bulletin*. The NCTM President gives a briefing on the status of resolutions passed the previous year at the beginning of each Delegate Assembly.

## LEGAL AND TAX ISSUES FOR NCTM AFFILIATES

### QUESTIONS AND ANSWERS

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#### INTRODUCTION AND PURPOSE

Although NCTM and its Affiliates operate with similar missions to serve teachers of mathematics, they are separate entities that operate independently. NCTM's incorporation status, tax status, and insurance coverage do not extend to its Affiliates.

NCTM has received questions regarding some legal aspects of Affiliate management. Given that state and local laws are so diverse, these issues require legal counsel. To assist Affiliates, the following questions and answers were prepared. The answers include resources for further information. The information below is intended to serve as a resource and should not be construed as legal opinion or advice. Please refer to the appropriate resources and seek legal counsel for additional information.

**Q. Is my Affiliate covered under NCTM's incorporation status, tax status, and insurance coverage?**

- A.** No. NCTM is a legal and separate entity from all Affiliates (i.e., local, state, and Affiliates-at-Large) and its incorporation status, tax status, and insurance coverage do not extend to any Affiliate. Therefore, any legal, incorporation, tax, insurance, etc., questions or guidance must be directed to the Affiliate's local professional services for each of these issues.

**Q. What are the benefits of having my Affiliate incorporated?**

- A.** An organization may choose to become incorporated, thereby creating a legal entity composed of individual members but considered to have its own existence apart from its members for the purposes of organization, operations, liability, longevity, holding property, and so forth. Incorporation is a state process, and therefore the process and specific benefits may differ according to the state of incorporation.

To learn more about the value and process of incorporating as a nonprofit organization, please seek legal counsel and additional information in the state in which you wish to incorporate.

**Q. What about state tax-exempt status?**

- A.** As not-for-profit organizations, NCTM and its Affiliates are eligible for nonprofit tax-exempt status. Nonprofit is a state law concept and as such the nonprofit status is determined under the laws of each individual state. A nonprofit status may provide certain state benefits, such as exemptions from state sales, property, and income tax. Since the state tax-exempt status is determined by each individual state, the state tax-exempt status applies only in the state or states in which your Affiliate has applied for and received tax-exempt status. For more information on state tax exemption, contact your state directly.



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**Q. What about federal tax-exempt status?**

- A.** Organizing as a nonprofit organization at the state level does not automatically grant the organization exemption from federal income tax. Only the Internal Revenue Service can grant not-for-profit organizations an exemption from federal income tax. Incorporation is not required for an organization to be considered tax-exempt by the IRS. For more information on the topic of federal tax exemption, visit <http://www.irs.gov/charities/topic/index.html> or seek legal counsel.

**Q. What insurance coverages are available for my Affiliate?**

- A.** The following are types of insurance coverage an Affiliate might consider.

**General Property and Liability Coverage**

Property insurance protects the organization's physical assets, such as a building and its contents. Liability insurance protects from losses resulting from a real or alleged wrongful action on the part of the insured whether it be the directors, officers, staff, volunteers, or the organization itself. Property and liability coverage also may be extended to include "off premises" activities such as seminars, conferences, and so on.

**Association Professional Liability Insurance**

Also referred to as Directors and Officers Liability coverage, this insurance serves to ensure designated officers and directors of an organization insurance coverage that protects the individual from personal liability as a result of decisions or situations that occurred during the officer's term in office.

**Volunteer Protection Act**

The Volunteer Protection Act is intended to protect volunteers from liability for negligence that occurs within the scope of their work for the organization. It does have limitations and provides no protection for the organization itself.

Because the insurance area is complex and the ramifications are great, seek a knowledgeable agent or broker to assist your Affiliate with adequate and appropriate coverage.

**Q. What should my Affiliate know about the Americans with Disabilities Act (ADA) requirements?**

- A.** Each Affiliate offers a variety of professional development offerings, and Affiliates must become aware of the ADA requirements. This act requires organizations to provide full and equal accommodations to individuals with disabilities (defined as a condition that impairs major functions such as mobility, sight, or hearing).

One area of significant impact is at conferences. The conference host, at its own expense, must provide reasonable accommodations for those individuals protected by law. This includes ensuring that the meeting facilities and displays are accessible to individuals with disabilities as well as providing auxiliary aides, such as qualified sign interpreters, Braille programs, listening devices, etc., for those requesting them.

For more information, visit [www.usdoj.gov/crt/ada](http://www.usdoj.gov/crt/ada).

**SUMMARY**

NCTM's services are available to assist with many questions regarding Affiliate management. However, NCTM does not have the staff or legal resources to assist with matters related to legal and tax issues. The issues addressed above are complex and require each Affiliate to obtain legal guidance.