

Strengthening Your Affiliate: A Self Study Form

Please review this checklist with the board members of your Affiliate. Stimulating discussion and raising these issues should help strengthen your Affiliate. Modify as needed!

Evaluation questions fall into the following categories.

- A. Affiliate Constitution Review
- B. Leadership
- C. Financial
- D. Membership
- E. Communicating with members
- F. Professional Development
- G. Other Member Services
- H. Relationship with NCTM and Other Affiliates

A. Affiliate Constitution Review

	Yes	No
1. In your constitution, is the purpose clearly stated and consistent with that of NCTM? a) Do you have a vision statement? b) Do you have a mission statement that is consistent with that of NCTM?	a)____ b)____ _	a)____ b)____
2. Has your Affiliate submitted your most recent amended constitution/bylaws to NCTM Affiliates Services?		
3. Will the membership clause permit anyone who is interested in the purposes of the Affiliate to join?		
4. Is there a provision for continuity of officers (i.e., do terms of office expire at different times rather than all terms expiring at the same time)?		
5. Is there a dissolution clause that clearly takes care of excess funds in the event of dissolution?		
6. Is there provision for an NCTM representative?		
7. Is there a requirement that both president and NCTM representative maintain current membership in NCTM?		
8. Are the elections, procedures, and committee activities carried out in accordance with the criteria set up in the constitution?		
9. Are there well defined position descriptions for officers and committees?		
10. Is there an established procedure for committees to report to the Affiliate?		
11. Are provisions made for a voice in the Affiliate by members from a) all geographical areas? b) all instructional/grade levels?	a)____ b)____	a)____ b)____
12. Is there an established procedure for nomination of officers?		
13. Is there provision for the study of future needs and direction of the Affiliate?		
14. Are there plans for periodic review of the constitution?		

B. Leadership

	Yes	No
1. Is there a plan for replacing officers who leave the board?		
2. Is there a plan for bringing in new people to become executive/board members?		
3. a) Is there a limited number of years a member can be on the executive/board? b) What is that limit? _____ c) How long before a member can return to serve on the executive/board? _____	a)____ 	a)____
4. Is the executive/board representative of the ethnicity of the region/state/province?		
5. Does your Affiliate send executive/board members to NCTM Affiliate leaders conferences?		

C. Financial

	Yes	No
1. Is there a tentative budget for at least a year in advance?		
2. Is a proposed budget prepared by an experienced Treasurer or budget committee?		
3. a) Are the dues sufficient to meet your budget? b) How much are the dues? _____	a)____ 	a)____
4. Is there a cash reserve fund?		
5. Does the budget provide for-- a) planning? b) programs? c) publicity? d) newsletters? e) conferences (e.g., Affiliate Conferences, NCTM leadersconferences, etc.)? f) other projects?	a)____ b)____ c)____ d)____ e)____ f)____	a)____ b)____ c)____ d)____ e)____ f)____
6. Are most expenses incurred by your officers in serving your Affiliate paid for by your Affiliate?		
7. Is there a system for oversight of all Affiliate funds?		
8. a) Do all checks over a given amount require two signatures? b) What is that amount? _____	a)____ 	a)____
9. Are all expenses verified and paid in a timely manner?		
10. Are the dues collected using an established and systematic procedure?		
11. Is there a receipt for dues or a membership card?		
12. Is there a regular audit of the treasurer's books?		
13. Is the treasurer bonded?		
14. Do you capitalize on the rebate incentive available to Affiliates for submitting new and renewing NCTM members?		
15. Does your Affiliate have several sources of income (e.g. membership, conferences, workshops, materials)?		
16. Is your Affiliate registered as a non-profit organization?		

D. Membership

1. What percentage of the teachers of mathematics in your region belongs to your Affiliate?

2. What percentage of your members are NCTM members? (65% qualifies Partner Affiliates for NCTM Affiliate Leadership Circle membership) _____

	Yes	No
3. Does your Affiliate have membership goals and plans for achieving The goals?		
4. Does your Affiliate have a method for contacting potential members?		
5. Do you have membership chairs for the various geographic Regions or instructional levels?		
6. Does your Affiliate have a membership brochure explaining its purpose and detailing its activities?		
7. Does your Affiliate conduct an annual membership drive?		
8. Do you have a membership booth set up at each conference or event?		
9. Is there a reduced conference registration fee for members?		
10. Does your Affiliate use a joint membership form with NCTM? (For Partner affiliates or in conjunction with a Partner Affiliate)		
11. Is there a procedure so that individuals whose memberships have elapsed are contacted-- a) by mail? b) in person? c) by e-mail? d) by phone?	a)____ b)____ c)____ d)____	a)____ b)____ c)____ d)____
12. Are special efforts made by your Affiliate to attract membership by-- a) level (e.g., elementary, middle, secondary, junior college, university or teacher education)? b) location (e.g., inner city, rural)? c) type of school (e.g., public, private, parochial, vocational)? d) diversity (e.g., ethnicity, gender, age)?	a)____ b)____ c)____ d)____	a)____ b)____ c)____ d)____
13. Is there a reduced membership fee for students?		
14. Is there a reduced membership fee for retired teachers?		
15. Can members join for more than one year at a time?		
16. Do you make efforts to include members other than board members in the work of the Affiliate?		
17. a) Is there a membership list that contains the name, address, ZIP/postal code, phone number, e-mail address, and teaching level of each member? b) Can your membership list be shared with NCTM? c) If no, why not? _____	a)____ b)____	a)____ b)____

E. Communicating with Members

	Yes		No	
	N	W	N	W
1. Is there a publication such as a newsletter? Web site?				
2. Is your publication or Web site intended for all members?				
3. Are the objectives of your publication or Web site-- a) to publicize Affiliate activities? b) to advance content or methodology? c) to promote policy towards legislation? d) to keep members informed? e) to tell what the teachers and the schools are doing? f) to provide a vehicle for members to express their ideas?	a)___ b)___ c)___ d)___ e)___ f)___	_____ _____ _____ _____ _____ _____	a)_ b)_ c)_ d)_ e)_ f)_)	_____ _____ _____ _____ _____ _____
4. Does your newsletter or Web site achieve its objectives?				
5. Is the content relevant to your members?				
6. Is there content relevant for each instructional level (e.g., elementary, middle, secondary, etc.)?				
7. Is the quality of the newsletter or Web site high in relation to format, editing, content?				
8. Is the newsletter mailed regularly and on time?		na		na
9. Is there an editorial board to consider policy for your newsletter?		na		na
10. Do you solicit articles from your membership?		na		na

F. Professional Development - Conferences, Workshops

	Yes	No
1. Are members polled or surveyed for their needs ?		
2. Are conferences planned to have sufficient breadth of interest to attract all members and all potential members by-- a) level (e.g., early years, middle years, secondary, teacher training, etc.)? b) location (e.g., rural, urban)? c) type of school (e.g., public, private, parochial, vocational)? d) type of student (e.g., special needs, ESL, college prep)?	a)_____ b)_____ c)_____ d)_____	a)_____ b)_____ c)_____ d)_____
3. Is there a variety of presentation formats at conferences?		
4. Do conferences contain provisions for social interaction?		
5. Are conferences of sufficient length to encourage people from a distance to attend?		
6. Are conferences or workshops timed (e.g., weekends or after school) so that they are accessible to all members and prospective members?		
7. Are conferences/workshops located in desirable and convenient locations?		
8. Do you use a variety of speakers? (e.g., diversity, local, out of town, various instructional levels)		
9. Do you publicize your conferences or workshops a) by newsletter or Web site? b) by media releases? c) by e-mail?	a)_____ b)_____ c)_____	a)_____ b)_____ c)_____
10. Is financing for conferences or workshops obtained through a) dues? b) registration fees?	a)_____ b)_____	a)_____ b)_____

c) exhibit fees? d) advertising? e) grants? (e.g. local schools, state/provincial departments of Education, industry, NCTM) f) sale of NCTM materials?	c)_____ d)_____ e)_____ f)_____	c)_____ d)_____ e)_____ f)_____
11. Are the objectives of professional development consistent with the purpose of the Affiliate?		
12. Do the objectives of professional development reflect current mathematics education issues?		
13. Is there an evaluation procedure to determine if the objectives of the conference or workshop are achieved?		

6. Other Member Services

	Yes	No
1. Does the Affiliate provide or support multiple services such as-- a) mathematical contests or fairs b) lecture programs c) future teachers (e.g., Student Affiliates)? d) special recognition ceremonies? (See #2 below.)	a)_____ b)_____ c)_____ d)_____	a)_____ b)_____ c)_____ d)_____
2. Does the Affiliate have special awards for - a) outstanding teachers of mathematics? b) outstanding new teachers? c) outstanding mathematics students? d) outstanding research projects? e) outstanding contributions to the profession?	a)_____ b)_____ c)_____ d)_____ e)_____	a)_____ b)_____ c)_____ d)_____ e)_____
3. Does your Affiliate have a publicity committee that prepares releases for newspapers, radio, television and professional journals about-- a) activities of the Affiliate? b) awards of recognition presented to members? c) speakers on programs? d) special projects?	a)_____ b)_____ c)_____ d)_____	a)_____ b)_____ c)_____ d)_____
4. Does your Affiliate have a speakers' bureau that has speakers available for workshops or such public meetings as parent association meetings?		
5. Does your Affiliate have a committee that keeps track of proposed legislation affecting education and informs the membership of such legislation and the action(s) on it?		
6. Does your Affiliate have a committee that will prepare and present reports to legislative bodies about current trends in mathematic education or teacher certification?		
7. Does your Affiliate provide consultant services on local or state/provincial curriculum planning programs?		

H. Relationships with NCTM and Other Affiliates

	Yes	No
1. Do you inform your members about NCTM and its programs and publications?		
2. Do you use joint membership forms?		
3. Do you complete reports (e.g., President's Annual Report) to keep NCTM up-to-date on Affiliate activities and to serve as historical records for your organization?		
4. Do you consider and submit potential resolutions for the NCTM Delegate Assembly?		
5. Do you send a delegate to the Delegate Assembly?		
6. Do you exchange newsletters with other Affiliates?		
7. Are you acquainted with your Affiliate Services Committee (ASC) representative?		
8. Have you invited your ASC representative to board meetings (Partner Affiliates) or contacted your ASC representative for information or assistance?		
9. Does the Affiliate utilize NCTM resources (all are online), such as a) Affiliate Forms and Downloads? http://www.nctm.org/about/content.aspx?id=9318 b) The Affiliate Services Program guidebook that's updated annually? (See Downloads at http://www.nctm.org/about/content.aspx?id=9318) c) Affiliate Annual Report Online Submission Form? http://www.nctm.org/about/forms.aspx?ekfrm=9210 d) Affiliate Conference Dates Listings? http://www.nctm.org/about/content.aspx?id=292 e) Affiliate Conference Information Online Submission Form? http://www.nctm.org/about/forms.aspx?ekfrm=9172&TransferError=Error+executing+child+request+for+%2fabout%2fforms.aspx . f) NCTM's Legislative Update ListServe? http://www.nctm.org/news/content.aspx?id=5568	a)____ b)____ c)____ d)____ e)____ f)____ —	a)____ b)____ c)____ d)____ e)____ f)____ —
10. In the last year have you taken advantage of the following NCTM Services? a) Publicity for meetings in the on-line Professional Dates listing? b) NCTM materials on consignment? c) Co-sponsored meetings? d) Mailing lists? e) the Affiliate pages on the NCTM website?	a)____ b)____ c)____ d)____ e)____	a)____ b)____ c)____ d)____ e)____
11. Does your Affiliate have an NCTM representative who is knowledgeable of NCTM and its priorities?		
12. Does your Affiliate submit names for NCTM committees?		
13. Have you worked with other Affiliates in activities such as participating in joint meetings, providing assistance in preparing programs such as providing speakers/presenters names?		
14. Does your Affiliate provide consultant services for local, state or provincial curriculum planning programs?		
15. Does your Affiliate have a cooperative working relationship with local, regional, and state or provincial consultants such as providing consultant services?		

