

Affiliate Relations Task Force Report to the NCTM Board of Directors April 2012

The Board of Directors of the National Council of Teachers of Mathematics approved a motion in October 2011 to establish the Affiliate Relations Task Force (ARTF). The members of the appointed task force include chair William Speer (past chair of ASC, past president of Ohio CTM, Nevada MC, SSMA, RCML, and founder of BGCTM and UNMC-LV student affiliates), Cresenda Jones (past president AMTNJ), Tom Muchlinski (past chair of ASC and past president Minnesota CTM), board liaison Linda Gojak (president-elect NCTM, past president NCSM, Ohio CTM, and GCCTM), and staff liaison Jennifer Johnson (NCTM Senior Director of Member Services, Marketing, and Business Development).

The overall charge of this group was to take an in-depth look at the current affiliate structure, identify challenges with respect to NCTM's relationship with affiliates, and make recommendations for potential implementation with current and future affiliates of NCTM. The rationale for the establishment of the ARTF provides important background information relative to task-definition.

Rationale: There are currently 234 organizations that are Affiliates of NCTM. The nature of the relationship varies greatly along a number of dimensions (e.g., size, function, level of shared membership). Also, the low level of Affiliate membership in NCTM provides a possible population for recruiting new members for NCTM. At the same time there exists the possibility that a mutually beneficial new relationship may be formed with at least a subset of NCTM Affiliates.

Following an introductory and focusing teleconference call in December, the group met in Tampa, Florida on January 5-6, 2012. To inform the ARTF work, the group closely examined several documents including the Affiliate Services Guide, information on the various ASC pages of the NCTM website, results of the ASC survey that was sent to all affiliates in 2011, and the most recent ASC Annual Report. The ARTF also considered the remarks of NCTM Executive Director, Kichoon Yang, regarding affiliates in his October 2011 report to the NCTM Board and information on "component relations" from the American Society of Association Executives. Additionally, the group examined the affiliate frameworks used by other national education professional organizations.

Our discussions focused on the current affiliate structure of NCTM, the challenges for NCTM regarding affiliates, the challenges facing affiliates, the identification of ways of increasing the membership intersection between affiliates and NCTM and, finally, recommendations to the Board regarding changes to the current affiliate structure and protocols for working with affiliate groups.

One caveat to the work and the recommendations of this task force should be clearly understood. Almost all communication and services currently offered to our affiliates comes through the work of the Affiliate Services Committee (ASC) and one staff liaison.

The ARTF honors and applauds the strong tradition of the relationship built with affiliates through the considerable efforts of the ASC and the NCTM staff. The recommendations presented herein are intended to empower both entities to consider new and innovative ways of accomplishing their current (and future) work and how to assist NCTM in better meeting its own needs as a national organization while supporting the work of the individual affiliate groups.

The amount of information available to support affiliates at all levels (new, established, small and large) is one indication of NCTM's commitment to its affiliates. Current communication with affiliates, information on the NCTM website, and other efforts which not only support our affiliates but also inform them of NCTM opportunities tend to be in the form of passive communication. That is, there is a tendency to depend on the efforts of the affiliate officers to seek out information. While efforts to keep affiliates informed are to be acknowledged, in today's busy technology driven world, those who take on leadership roles in organizations are likely those people who already lead lives with little time to spend searching for what NCTM has to offer. Even reading a broadly cast email message can be overlooked on a busy day. The spirit of this report, then, is for NCTM, through the efforts of those entities that regularly deal with affiliates, to take on new, proactive efforts to communicate with and support our affiliate groups.

The recommendations presented by the ARTF have a common theme that centers on a subtle but potentially important notion of the Affiliate Services Committee becoming more of an Affiliates SUPPORT Committee. This is not just a matter of semantics. A stronger message is conveyed through the emphasis of support over service. As we consider potential structures and opportunities, we realize that the relationship between NCTM and its affiliates is actually one of supporting each other and not simply providing service. Support can be thought of as a mutually beneficial relationship that goes beyond NCTM providing a collection of services to its affiliates. One could argue that the notion of "services" might include a menu of items, some of which are neither wanted nor appreciated while the notion of "support" may be thought of as offering a menu of items that any affiliate wants and needs.

NCTM and its affiliates have a symbiotic relationship. One might anticipate that membership numbers from our affiliate groups should certainly enhance NCTM's membership numbers, but this is not the case. Many members of affiliate groups are not members of NCTM (and many members of NCTM within a particular affiliate group's "jurisdiction" are not members of that affiliate). Specific numbers for these subsets are not readily available. However the issue is much more than one of numbers – it is a matter of shared support and commitment to the mathematics teaching profession. NCTM currently offers support to affiliates in a variety of ways including information on the web, hosting the leadership conference each summer, overseeing grants to affiliates, and organizing the caucuses and delegate assembly - a potentially important voice of affiliates at the annual meeting. In like fashion, members of our affiliates volunteer at NCTM conferences, serve on NCTM committees, and participate in NCTM in other ways such as grant seekers through the Mathematics Education Trust or serving as authors for NCTM journals and ancillary publications.

Some current activities provided for affiliates address, in part, several recommendations in this report, however not all affiliates are able to participate for a variety of reasons. For example less than 20% of our affiliates are represented at the leadership conference, a major project of the ASC. With the availability of technology, there are new avenues that can help NCTM and ASC efficiently and effectively offer current and new support to our affiliate groups giving them the opportunity to be actively involved. The social networking that is available today provides an outstanding opportunity for sharing and engagement at a level that was not available just a few years ago. The days of sending out affiliate journals and newsletters to massive affiliate editor lists via regular post (for potential “cut-and-paste” into local missives) is, rightfully, long gone.

The recommendations presented in this report by the ARTF are intentionally general. We encourage the ASC and NCTM staff to brainstorm and reflect in different and creative ways about how to make the recommendations come to fruition.

Considering the charge to the ARTF, we present the following recommendations to the NCTM Board of Directors for their consideration:

Recommendation 1:

ASC consider flexible grouping of affiliates to be determined by the support being offered.

Rationale:

There would seem to be many circumstances when affiliates would best be supported if grouped by similar structure (i.e. at-large, state, local, student) rather than by the current geographic or category (partner, associate, student) structures.

Elaboration:

NCTM’s current affiliate structure includes several categories in addition to geographic regions. State and province level affiliates and those with more than 1500 members fall into the category of Partner Affiliates. Groups with at least 75 members, but fewer than 1500 members, that are not at the state or province level may elect to be a Partner or an Associate affiliate. A third category is represented by Student affiliates. (Services to these categories are in Appendix A of this report.)

The current model of grouping affiliates by geographic regions offers some level of convenience and certain advantages in assigning ASC members. The current structure of partner and associate affiliates was designed to help provide levels of service based on specific criteria. However, neither of these organizational models offers optimal opportunities for networking or information exchange. The ARTF suggests a reconsideration of the grouping structure to be used in the leadership summit, the caucuses and organization of information on the ASC pages of the NCTM website. Such divisions might include affiliates-at-large, state affiliates, regional affiliates, local affiliates, student affiliates.

The ARTF further recommends that the ASC explore and possibly divide larger groups according to a primary focus of the group. For example, some state affiliates function as a highly active organization with a “regular” schedule of state meetings and activities, journals and newsletters and might, in fact, include its own subset of state/local affiliates (such as is the case for Ohio and Illinois). Other state affiliates may act as overseeing or governing bodies for large regional groups that function as “mini-state” chapters in their states (such as is the case for California and Nevada).

The intention of this recommendation is to assign the current committee membership of the ASC in ways that better address and support the activities, needs and membership of affiliates by grouping by, for example, the type of affiliate rather than by, say, geographic region. There is no intent in this recommendation to have fewer members serve on ASC. However, the availability of technology offers efficient means of communication and support that is not exclusively dependent on geography or direct contact service.

Recommendation 2:
NCTM and ASC reexamine and extend the support offered and provided to student affiliates.

Rationale:

NCTM must make a strong commitment to students preparing to teach K-12 mathematics, a collective group who are critical to the future of the Council.

Elaboration:

Student affiliates are a unique “breed” of affiliate for a host of reasons. They require support that differs from that of the teacher-based affiliates. Among the most notable differences are constant membership attrition, limited financial resources, level of professional awareness of members, limited leadership experiences, and dependence upon faculty support and leadership. Additionally students preparing to teach elementary school must attend to a variety of curricular areas in their studies, many of which also have student engagement opportunities.

One consideration for support for our student affiliates is offering undergraduate members of student affiliates a one-time, one-year free e-membership to NCTM. The Council currently offers a discounted membership fee for students, whether through an affiliate group or not. The opportunity for a free e-membership to NCTM has the potential to encourage students to join student affiliates where they currently exist as well as to have other institutions of higher education form new student affiliates. An added benefit is pre-service teachers, as new members of NCTM, learn about teaching mathematics, get excited about NCTM and see the value in membership. The NCTM membership department should make student group development and support a priority by seeking innovative ways to encourage continued participation in NCTM beyond graduation.

Because student affiliates heavily depend on faculty advisor involvement, we suggest consideration of some type of compensation either monetary or non-monetary be offered to faculty advisors of student affiliates. The current means of honoring that service does not appear to have the desired impact – it often is not something that encourages faculty participation and engagement, instead, it appears to often serve as a door prize for a membership meeting. That, in and of itself, is not all bad, but is that the intent?

Recommendation 3:
NCTM should explore the potential of increased formal relationships with professional organizations that both directly and indirectly deal with mathematics education.

Rationale:

NCTM, as the expert on mathematics education, should be a rich resource and provide valuable information on topics such as effective mathematics instruction, current research agendas and results, and implementation of the Common Core State Standards to non-subject specific leadership and curriculum organizations (i.e. ASCD, NMSA, NAESP, NASSP, etc.)

Elaboration:

As we move forward in an era of common standards, a broad group of organizations are taking on the development and dissemination of models of implementation that include mathematics content and pedagogy. Without the input and guidance of NCTM, the potential for ineffective models, incorrect content information and inappropriate pedagogy that is not based on what we know about how students learn mathematics is likely to be shared with administrators, curriculum generalists and instructional coaches who have major impact on mathematics instruction at the district level.

A formal relationship with these other organizations, similar to, but not identical to, NCTM's relationship with affiliates should be actively explored. These relationships must support the Council's vision, of the "National Council of Teachers of Mathematics as a public voice of mathematics education supporting teachers to ensure equitable mathematics learning of the highest quality for all students through vision, leadership, professional development and research." and the mission of "The National Council of Teachers of Mathematics as a global leader and authority in mathematics education, ensuring that all students have access to the highest quality mathematics teaching and learning. We envision a world where everyone is enthused about mathematics, sees the value and beauty of mathematics, and is empowered by the opportunities mathematics affords."

The Executive Director and the NCTM President should lead this endeavor by identifying appropriate board members and staff to help define and determine ways to make this happen.

Recommendation 4:

NCTM's membership and marketing departments should collaborate with the ASC and the ASC staff liaison to explore new and creative ways to optimize the intersection of the membership rosters of affiliate groups and NCTM.

Rationale:

Affiliates who share information with their members on the benefits of membership in NCTM are more likely to recruit new NCTM members and help to retain current NCTM members.

Elaboration:

NCTM's affiliates offer a potential source of many new members for the Council. There are many ways in which NCTM can communicate with affiliates leading to the recruitment (and retention) of NCTM members through direct contact with affiliate members. Currently NCTM offers incentives such as rebates and the membership circle program to encourage affiliates to promote NCTM membership. While these two programs are noteworthy, an often-stated estimate is that less than 10% of affiliate members are also members of NCTM. NCTM's membership and marketing departments should focus efforts to work with ASC and its staff liaison to develop new, innovative means of informing affiliate groups about NCTM activities including conferences, institutes, journals and publications, webinars, information on the website, Illuminations and other benefits of membership to NCTM.

Recommendation 5:

ASC should increase the amount and nature of timely, focused, and, perhaps most importantly, "more personal" communication with NCTM affiliates officers and membership.

Rationale:

Regular communications from ASC members and Headquarters are currently the backbone of the relationship between NCTM and its affiliate groups.

Elaboration:

The ARTF applauds the ASC e-Blasts but questions the frequency, length and focused targeting of these messages. In addition, relying on the affiliate leadership (often, one designated individual recipient) to forward important messages that highlight NCTM's activities and benefits to members may indicate that an important principle of direct marketing is being ignored.

Increase communication in the form of brief personal contacts from the ASC representative to a broad range of affiliate officers explicitly requesting the messages be forwarded to affiliate members on a scheduled basis.

Other ways of promoting NCTM's membership benefits and activities in affiliate newsletters, journals, and at meetings would provide a means of promoting these activities among affiliate groups and their members. For example, sending a quantity of

advertising brochures for the summer institutes directly to the NCTM representative with a cover letter requesting dissemination and a simple process for requesting additional brochures has the potential to be a very effective marketing tool. Of course, electronic versions of important events make for even easier distribution. Camera-ready pdf files on the affiliate website provide newsletter and journal editors “filler” materials for open space in their publications. ASC is the brainstorming group to develop a menu of opportunities for communicating with affiliates. NCTM staff (beyond ASC) provides the means for making the ideas happen!

Recommendation 6:

NCTM and ASC determine and implement ways of increasing networking opportunities for affiliates.

Rationale:

The full advantage of social networking that was not available just a few years ago has opened up a rich line for communicating and sharing news, events promotion, and common interests among affiliate groups.

Elaboration:

One of the highlights of the annual caucus is the opportunity for affiliates to share their activities, highlights, information and concerns with each other. Initiating an electronic forum through social networking for ongoing communication among the affiliates provides them with the means for asynchronous conversations and sharing year round. NCTM should use the expertise of its IT staff and other experts as needed, to explore the plethora of social networking media available and initiate a platform for our affiliates to use.

Recommendation 7:

ASC should clarify the expectations for committee members of ASC with regard to individual specific roles and responsibilities to the affiliates they serve.

Rationale:

Currently, the amount of service that an affiliate receives from its associated ASC member is, in large measure, dependent upon that individual committee member’s understanding and commitment to the tasks and responsibilities of the ASC.

Elaboration:

ASC members already address a multitude of tasks – a fact not likely to change under any revised organizational model. The issue seems to be one of providing a support structure that enables a climate of working smarter rather than working harder. It should be noted that the assignment of committee members to various ASC undertakings using the current “three ships” model is laudable. At the same time there are tasks that are common to all ASC members. Clarifying committee member responsibilities and considering ways to monitor that those responsibilities are being met will ensure that all affiliates are receiving comparable, but arguably not identical, services and support.

Making individual appointments to the ASC is currently the responsibility of the NCTM President. Such committee appointments are important but, at the same time, can be overwhelming. It would be beneficial if the ASC were to provide the President with specific qualifications and talents held by ASC members and suggest names of potential members who have served in outstanding leadership roles in their individual affiliates that possess similar or needed talents. This would help to ensure that the best qualified people are invited to serve on the ASC.

Recommendation 8:

ASC and NCTM affiliates should reexamine and clarify the roles and qualifications of affiliate appointed/elected NCTM representatives and the means by which that information is communicated to the affiliates and to the individual NCTM representatives.

Rationale:

The range of responsibilities undertaken by NCTM representatives varies widely as does the level of experience of those appointed/elected to that role.

Elaboration:

The role of the NCTM representative as the conduit of communication between NCTM and his/her affiliate is critical to the relationship between NCTM and affiliate group members. Therefore, the selection of an NCTM representative should not be a casual or “off-handed” appointment by the affiliates.

Information on the role of the NCTM representative is currently in the Affiliate Services Guide. Adding specific suggestions for the qualifications of the NCTM representative will help affiliates find good candidates and reinforce the importance of this position. ASC should take advantage of every opportunity to enhance the role of the NCTM representative among affiliates from preparation of the NCTM representatives to their connections with NCTM to fulfilling their duties as NCTM representatives. From NCTM’s perspective, this should be the most well defined contact between the Council and the affiliate. There are multiple ways to prepare NCTM reps for their work with affiliates in addition to the Affiliate Services Guide. A webinar for new NCTM reps available on the web for them to view at their convenience could efficiently introduce them to their roles, responsibilities, and resources available from NCTM and suggested activities. Personal communications from ASC to the NCTM representative could serve as reminders and motivation for NCTM representatives to take advantage of every means of advocating the importance of NCTM to the affiliate and to its membership.

Recommendation 9:

Rethink the current structure of the caucus/delegate assembly at NCTM annual meeting.

Rationale:

The stated purposes for the Caucus are to 1) discuss resolutions and responses; 2) introduce new resolutions; 3) network with other leaders; and 4) get information on new initiatives in mathematics education. It might be argued that the organization of the Caucuses by geographical region is not the best means of accomplishing these purposes.

Elaboration:

Gathering together prior to the Delegate Assembly in the current Caucus structure has its advantages. Members of various affiliate groups who have not interacted for a year can meet and share. However, meeting by geographical region does not adequately address the stated goals of the Caucus. An alternative would be to consider setting up the Caucus structure on a different organizer than geographical region. Rather than regional, why not use affiliate “birds of a feather” as the grouping structure? Perhaps, since we’ve always met by regions in the past, and, consequently, abandoning geographical regions is just too radical of a concept, then ASC might consider the individual Caucus sessions be organized or structured by “like” affiliates – even if within geographic regions.

The purpose, nature, and structure of both the Caucuses and the Delegate Assembly have evolved over the years. It may be time to formally rethink the purpose of the Delegate Assembly. Even though the NCTM Delegate Assembly has always been a gathering of AFFILIATE DELEGATES to the NCTM annual meeting – there is a lingering sense on the part of some that the Delegate Assembly provides an opportunity for the broader NCTM organizational membership to have representation to the Board. The Assembly, however, represents Affiliate Membership and, as such, may not have a strong intersection with general NCTM membership. While it is safe to assume that most of the delegates are also NCTM members (after all, the ASC rules require that the NCTM Representative be a NCTM member), they are representing the affiliate – not the NCTM membership living in the region of their affiliate. Perhaps the Delegate Assembly should be the focus of a great opportunity to celebrate and spotlight the affiliates and honor them, with much less attention on the governance of resolutions and business-like environment. Is the present format of the Delegate Assembly a remnant of the past? A past in which most NCTM members were also members of a represented affiliate?

In conclusion, we applaud the current work of the ASC in reaching out to support our affiliate groups. At the same time, we cannot be complacent about finding new ways to strengthen our relationship with each affiliate. This not only serves NCTM in ways to attract new members, but also has the potential to disseminate the information and support of a world-class professional organization to the local level, and to impact the mathematics education of every student in the United States, Canada and beyond. We encourage the Council to hold on to the things that work and at the same time, not be limited by what we have always done. It is important to honor our past, but even more important to envision our future.

Affiliate Services Overview

	Student Affiliates	Associate Affiliates	Partner Affiliates
LEVEL I Services			
Unlimited access to the Online Affiliate Resources.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
<i>AffiliateNews</i> e-newsletter.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Participation in the Delegate Assembly Process.*	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Consignment Program providing the opportunity to make NCTM resources available for Affiliate conferences.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Provision for development support from a sponsoring Partner Affiliate.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Opportunity to attend Affiliate Leaders Conference.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Affiliate Rebates: • \$5 for each new NCTM Full Individual and E-Membership • \$3 for each NCTM Full Individual and E-Membership renewal (Details on page 18.) Note: Rebates do not apply to student, emeritus (formerly retired), and K-8 memberships.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Consulting services of the Affiliate Services staff through personal contact, e-mail, and telephone.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
NCTM membership promotional materials.	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
Apply for appropriate Affiliate grant: ▪ Partner Affiliate - Kenneth B. Cummins Grant (maximum of \$3,000) ▪ Associate Affiliate Grant (maximum of \$2,000) ▪ Student Affiliate Grant (maximum of \$1,500)	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>	✓ <input type="checkbox"/>
LEVEL II Services			
Assistance from an Affiliate Services Committee representative and NCTM Affiliate Services through e-mail, telephone, and personal contact.			✓ <input type="checkbox"/>
Opportunity to host NCTM professional development programs such as regional conferences.			✓ <input type="checkbox"/>
Opportunity to meet with Affiliate Services Committee representative at state/provincial Affiliate board meetings.			✓ <input type="checkbox"/>
Listed in NCTM Regional Conference and Exposition Program Book			✓ <input type="checkbox"/>
Eligible to participate in the NCTM Affiliate Leadership Circle Program.**			✓ <input type="checkbox"/>
Community/Government Relations/Advocacy support from NCTM.			✓ <input type="checkbox"/>
Discounted exhibit booth space at NCTM Annual Meeting and Exposition and Regional Conferences and Expositions.			✓ <input type="checkbox"/>
Additional Student Affiliate Services			
\$50 NCTM gift certificate sent annually to the faculty advisor.	✓ <input type="checkbox"/>		
\$50 NCTM gift certificate sent annually to the Affiliate.	✓ <input type="checkbox"/>		