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Introduction

Strong, open relationships with teachers, leaders from schools, parents, legislators, businesses, media, and others are vital to the process of improving mathematics education.

Working together through affiliation, NCTM and affiliated organizations can amplify common messages and build a broad community of support for common goals.

NCTM seeks to provide resources and useful professional support for its members and Affiliates. The pages that follow outline the categories, services, and guidelines for affiliation. This document is sent to the Affiliate president, NCTM representative, treasurer, executive director/secretary, and faculty adviser annually.

Many mathematics organizations across the United States and Canada have a mission similar to the mission of the National Council of Teachers of Mathematics (NCTM).

About NCTM

**NCTM Mission:** The National Council of Teachers of Mathematics advocates for high-quality mathematics teaching and learning for each and every student.

**NCTM Vision:** 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.

**NCTM Strategic Framework**

**Teaching and Learning:** NCTM provides guidance and resources for the implementation of research-informed and high-quality teaching that supports the learning of each and every student in equitable environments.

**Access, Equity and Empowerment:** NCTM advances a culture of equity where each and every person has access to high-quality teaching empowered by the opportunities mathematics affords.

**Building Member Value:** NCTM provides community and resources to engage and listen to members in order to improve the teaching and learning of mathematics.

**Advocacy:** NCTM engages in advocacy to focus, raise awareness, and influence decision makers and the public on issues concerning high-quality mathematics teaching and learning.
NCTM Categories of Affiliation

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

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

**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.

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

**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 fewer than 1,500 members that are not state/province-level 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.

Each group selects a category at the beginning of the affiliation year (June 1) and may not change until the next dues cycle. The exception is an Associate Affiliate that wants to become a Partner Affiliate. In this case, the Affiliate must pay the difference between the original amount paid and the Partner Affiliate dues rate (without the early-payment discount).

**Affiliation Dues 2022—2023**

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 April 20, 2022, will receive the listed discounted price (payment must be postmarked on or before April 20, 2022). Affiliates that have not paid dues by June 1 will become *Not in Good Standing* and will not be eligible for services until dues are received.

<table>
<thead>
<tr>
<th>Number of Members</th>
<th>Partner DISCOUNT Pay by April 20</th>
<th>Partner Payment Due by June 1</th>
<th>Associate DISCOUNT Pay by April 20</th>
<th>Associate Payment Due by June 1</th>
<th>Student DISCOUNT Pay by April 20</th>
<th>Student Payment Due by June 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 400</td>
<td>$150</td>
<td>$180</td>
<td>$80</td>
<td>$100</td>
<td>$50</td>
<td>$75</td>
</tr>
<tr>
<td>400 to 999</td>
<td>$205</td>
<td>$245</td>
<td>$110</td>
<td>$135</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000 or more</td>
<td>$300</td>
<td>$360</td>
<td>$190</td>
<td>$230</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*(Payment must be postmarked before or on April 20, 2022, to be eligible for the discount.)*
## Affiliate Services Overview

### LEVEL I Services

<table>
<thead>
<tr>
<th>Service</th>
<th>Student Affiliates</th>
<th>Associate Affiliates</th>
<th>Partner Affiliates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unlimited access to the Online Affiliate Resources</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Affiliate News e-newsletter</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Participation in the Delegate Assembly process</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Access to the Affiliate Book Commission (ABC) Program, which makes NCTM publications available to Affiliate conferences</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Leadership development opportunities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Assistance from Membership and Affiliate Relations Committee (MARC) region representatives and NCTM Affiliate Relations</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Grant Opportunities</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Publication Awards</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

### LEVEL II Services – Includes all services from Level 1

<table>
<thead>
<tr>
<th>Service</th>
<th>Student Affiliates</th>
<th>Associate Affiliates</th>
<th>Partner Affiliates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity to host NCTM professional development programs such as regional conferences</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunity to meet with Membership and Affiliate Relations Committee (MARC) representatives at state/provincial Affiliate board meetings</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Discounted exhibit booth space at NCTM Annual Meeting and Exposition and Regional Conferences</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Opportunity to have affiliate events listed in the NCTM online event calendar</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

### Student Affiliate Services – Includes all services from Level 1

<table>
<thead>
<tr>
<th>Service</th>
<th>Student Affiliates</th>
<th>Associate Affiliates</th>
<th>Partner Affiliates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complimentary NCTM Student E-Membership for active student members</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complimentary registration for one faculty advisor to attend an NCTM Regional Conference or an NCTM Virtual Conference annually</td>
<td></td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Letter of recognition for a student faculty advisor upon request</td>
<td>✓</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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/province-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 email 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 addresses excess funds in the event of dissolution of the organization.

Sponsorship

State- and Province-level Partner Affiliates are encouraged to provide guidance and support to new Associate and Student Affiliates in their state. Affiliate sponsors support 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 (non-region groups that are organized around a specific topic in mathematics education) may want to have a sponsor with similar interests, make-up, or location. Sponsorship entails 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, color, national origin, religion, sex (including gender identity and sexual orientation), or disability. 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:

- pays affiliation dues.
- keeps NCTM informed of any changes in officers’ names or addresses, terms, membership dues, and other essential Affiliate information.
- has its president maintain current individual membership in NCTM throughout his/her term of office.
- has its NCTM representative maintain current individual membership in NCTM throughout his/her term of office.
- has its faculty advisor (for Student Affiliates) maintain current individual membership in NCTM throughout his/her term of office.
- files an annual report.
- maintains an approved constitution and bylaws, and submits copies of amended constitution and bylaws with amendments highlighted to NCTM Affiliate Relations.
- participates in the Delegate Assembly process when possible.
- promotes membership in NCTM.
- promotes NCTM by informing Affiliate members about NCTM’s programs, conferences, and publications.
- maintains year-round access to the Internet and email for the president and NCTM representative.
- maintains relationships with other Affiliates within the state, province, or region as applicable.
- participates or sends representatives to any organized assembly of NCTM when possible.
- provides ongoing support to Associate Affiliates and Student Affiliates within the state, province, or region, as applicable (Partner Affiliates only).
- notifies NCTM when the Affiliate organization has dissolved.
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 each designation means.

Good Standing

An Affiliate is 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.

Not in Good Standing

If any one of the four 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. Affiliation renewal notices are mailed annually, usually in February. NCTM emails monthly reminders to those Affiliates Not in Good Standing. Please provide your officers’ NCTM membership numbers to expedite processing.

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 Relations at affiliates@nctm.org.

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 should be submitted online using the Affiliate Officer Information Form.

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 Eligible to have Charter Withdrawn and is not eligible for services until the issue is resolved.

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. All officers on record for the Affiliate will be notified of their Affiliate’s Eligible to have Charter Withdrawn status approximately 90 days before the charter is officially withdrawn.

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:

- Promotes membership in NCTM.
- Communicates information on NCTM activities.
- Is knowledgeable about NCTM services available to NCTM Affiliates by regularly checking the online Affiliate resources.
- Provides NCTM Headquarters updated lists of Affiliate officers, dates for the Affiliate's professional development activities, and membership lists.
- Follows correct procedures for ordering and selling NCTM educational materials via the Affiliate Book Commission (ABC).
- Maximizes communication with the Membership and Affiliate Relations Committee (MARC) representative to enhance the partnership between NCTM and the Affiliate.
- Maximizes communication with the Affiliate’s members about NCTM (e.g., NCTM membership information, NCTM publications, conferences, and other professional development opportunities).
- Make sure Affiliate leaders are aware of their opportunity to submit resolution(s) and seek input on submitting resolution(s).
- Coordinates Affiliate’s involvement in the Delegate Assembly.
- Promotes NCTM professional development opportunities to Affiliate leaders.
- Encourages and works with the Affiliate president to submit the annual report.
- Submits copies of amended constitution/bylaws with amendments highlighted to NCTM Affiliate Relations.

Suggested Activities

- Be fully cognizant of the Affiliate’s position on Delegate Assembly resolutions and report back to the Affiliate on the disposition of the resolutions.
- Review and apply for a MET Grant.
- Submit for a publication award.

Available Resources

- Request digital copies of brochures or other promotional materials.
- Request information on the ABC program for meetings and conferences.
- Online Affiliate resources provide support for the NCTM Representative’s work.
Submitting New Officer Information and Annual Report

Before the end of the month in which current officers’ terms expire, an Affiliate’s responsibility is to submit the following to NCTM Affiliate Relations:

- New officer information. (The Affiliate president and NCTM representative must be current members of NCTM.)
- An annual report. The Affiliate 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). The annual report is to be completed cooperatively by the Affiliate’s president and NCTM representative annually.

These forms are available online in the Affiliate section of the NCTM website, on the Forms and Downloads for Affiliates page.
Affiliate Benefits

Committee Support to Affiliates

The Membership and Affiliate Relations Committee (MARC) is charged to promote the mission and goals of NCTM by:

- Strengthening and enhancing our core image through experiences that support and energize teachers’ passion for their profession; leveraging NCTM’s resources, conferences, educational tools, website, content, and webinars.
- Strengthening the mathematics education community by supporting activities and relationships between/among Affiliates and NCTM members; enhancing member participation in both while preserving the individual identity of each.
- Cultivating a dynamic membership strategy to identify and leverage all opportunities to increase retention and value among current members.
- Developing and overseeing a comprehensive, integrated plan to recruit new and lapsed members.
- Promoting a plan to develop diverse future leaders from members of the NCTM and Affiliate community.
- Identifying and serving the growing needs of members at various stages of their careers.
- Overseeing the planning and facilitation of the Regional Caucuses and Delegate Assembly.

MARC 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 and one individual as a student representative. Regional assignments are as follows:

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

Please note: MARC focuses on making personal contact through Zoom meetings, telephone, email, or by attending the board meetings of Partner Affiliates in the region when appropriate or feasible. Personal contacts allow the MARC 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.
Online Affiliate Resources

The Affiliate section of the NCTM website 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. Please email affiliates@nctm.org with any questions.

Affiliate News

Affiliate News is an electronic newsletter that provides timely information and updates to Affiliate leaders. The distribution list for each issue of Affiliate News is generated from our current Affiliate officer records. Affiliate News is automatically emailed to up to nine current officers of each Affiliate who have email addresses on file with NCTM. Please be sure the Affiliate officers’ email addresses are kept current with NCTM.

NCTM Leadership Development

NCTM has traditionally held a leadership conference in the summer. In February 2021, the NCTM Board directed the Membership and Affiliate Relations Committee to transform the Leadership Conference from an annual in-person event to an ongoing virtual program.

This work is currently in progress with the 2021-2022 MARC Committee. Information for upcoming events will be included in Affiliate News and made available on the NCTM website as soon as it is available.

Online Event Calendar

NCTM maintains a list of affiliate conference dates on the Affiliate Event Calendar. Affiliate conference information may be submitted to Affiliate Relations via the online submission form. There is also a “Submit Your Event” button available under the calendar on the NCTM website.

Discounts on Exhibit Booth Spaces

NCTM Affiliates receive special discounts on exhibit booth space at NCTM Annual Meetings and Regional Conferences. Affiliates with a status of In Good Standing will be contacted by NCTM's sponsorship and advertising group (YGS) when these opportunities are available for purchase.

Permissions and Logos

Request permission to reprint a journal article from Mathematics Teacher: Learning & Teaching PK-12 (MTLT) or an excerpt by emailing permissions@nctm.org.

Articles from NCTM Summing Up and NCTM President's Messages can be reprinted without permission as long as the original source is clearly cited.

The NCTM logo is trademarked, and its use is restricted to those approved by NCTM. The logos below were created specifically for NCTM’s Affiliates and may be used in certain settings if pre-approved. Contact affiliates@nctm.org for more information on the use of these logos.
Affiliate Book Commission (ABC) Program

NCTM Affiliates have the opportunity to make NCTM resources available to their own members at their own events.

The Affiliate Book Commission (ABC) program provides desk copies of leading NCTM publication titles to Partner Affiliates and allows them to promote the titles at their conferences. Attendees order through our store at a discount, and the Affiliate receives a commission on those sales.

- Affiliates may request a sample set of popular NCTM publications.
- The sample set of books is the Affiliate’s to keep and use at future events—your own library of display copies.
- New publications (not previously sent) may be requested as available to expand the sample set. Please include the name and address of the officer who will be receiving the sample books.
- At least four weeks prior to any event, the Affiliate may contact NCTM and request digital marketing fliers, which will have a code for attendees to use to receive a discount of 20% and free shipping.¹ This code will be active for one-week post-event, limited to two total active weeks.
- After the code expires, NCTM will send a commission check to the Affiliate treasurer on file for 10% of eligible book purchases.² Please be sure the treasurer’s information is up-to-date.
- Affiliates may also purchase titles to have on hand for direct sales with an Affiliate Purchase Discount of 30% and free shipping.³ A minimum order of $200 is required for this offer, and items are not returnable.

Please contact affiliates@nctm.org to inquire about the ABC program or to request sample books and/or marketing fliers.

¹ For events outside the contiguous United States, the code will provide a discount of 30 percent but shipping will not be free.

² A minimum of $200 of qualifying purchases must be made to receive a commission check.

³ Non-book products do not qualify for any discount but will receive free shipping.
Grant Opportunities

Applications are due May 1.

The purpose of the MET-funded grants is to support efforts of Affiliates to serve mathematics teachers by:

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

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

Grant guidelines and applications are posted online on the MET Grants to Affiliates page.

Partner Affiliate Grant: Kenneth B. Cummins Grant ($3,500 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 ($2,500 maximum)

The Mathematics Education Trust (MET) Associate Affiliate Grant is an award up to $2,500 for an exceptional grant proposal.

Student Affiliate Grant ($2,000 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 $2000.
NCTM Affiliate Publication Awards

Applications are due March 15.

The Membership and Affiliate Relations Committee (MARC) wishes to recognize the outstanding work of NCTM Affiliates in producing excellent journals (peer-reviewed periodicals in which scholarship relating to mathematics education is published) and newsletters (publications containing news or information of interest to members of its organization) to keep their membership informed. These publications should keep their membership apprised of the latest happenings in mathematics education, provide great ideas for improving the teaching and learning of mathematics, and provide networking opportunities for members.

A category to recognize special publications, printed materials, or other special work of an Affiliate is also considered for a special recognition award.

The Publication Awards guidelines and application are posted online on the Affiliate Publication Awards page.

Eligibility

- Affiliate is in good standing at the time of submission
- Affiliate has not won either publication award within the last five years.

Criteria

- Publication must be published at least twice a year
- Publication may be print and/or digital
- Publication must have a record of at least two years of consistent publication
- Signature of both the Editor and President must be present

Submission

- Three issues of the same publication:
  - From at least two different academic years
  - No older than three years
  - Electronic or hard copy

Judging

- Content
- Accessibility
- Relevance

Award

- Recognition at the Delegate Assembly
- One free registration at the next NCTM Annual Meeting and Exposition for the editor
Affiliate Student E-Memberships

Each active member of an NCTM Student Affiliate who is a current full-time student is eligible to receive a complimentary Student E-Membership (a $49 value), which includes:

- Online Access to all NCTM journals:
  - *Mathematics Teacher: Learning and Teaching PK-12 (MTLT)*
  - *Journal for Research in Mathematics Education (JRME)*
  - *Mathematics Teacher Educator (MTE)*
  - The archive libraries of all three legacy journals
- Free admission to NCTM Regional Conferences
- Discount registration to the NCTM Annual Meeting and other events
- Discounts up to 30% on professional development publications
- Access to online classroom resources
- Access to the MyNCTM, online mathematics community

NCTM Affiliate Relations will email the faculty advisor of each NCTM Student Affiliate *In Good Standing* annually with a spreadsheet specific to the current fiscal year. The faculty advisor may complete the spreadsheet, listing any active members of the Student Affiliate who are full-time students to receive this benefit.
Communicating with NCTM

NCTM Affiliate Relations 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**

NCTM uses email to communicate with Affiliate organizations. To maximize communication, every email will be sent to the organization’s president, executive director/secretary, faculty advisor, and NCTM representative on record. Affiliation can offer organizations few benefits when outdated officer information is on file with NCTM. Please help us keep active records by submitting your officers’ information.

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

NCTM 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 Affiliates 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 email addresses are included.

How to submit officer information:

- Online  [www.nctm.org/Affiliates/Forms/Affiliate-Officer-Information-Form/](http://www.nctm.org/Affiliates/Forms/Affiliate-Officer-Information-Form/)
- Email  affiliates@nctm.org
- Fax  (703) 476-2970
- Mail  NCTM Affiliate Relations
  1906 Association Dr
  Reston, VA 20191-1502
FAQs about the Affiliate Program

Q: When must affiliation dues be paid?
A: To take advantage of the early payment discount, renewal of affiliation dues payment must be postmarked no later than April 20. The regular rate for dues must be paid by June 1 to remain In Good Standing and have access to all services.

Q: Why does NCTM have various categories of affiliation?
A: Approximately 150 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 NCTM 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.

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.

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 will help position an Affiliate to take on this role. These services include grants, training, and consultant services from the Affiliate Relations Committee. Affiliate leaders need to be certain that there is an appropriate role for an additional Affiliate in their state/province.

Q: Why does 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.

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

Q: Will I need a password to use the Online Affiliate Resource Center?
A: No. The Resource Center is accessible to all.

Q: Why must all Affiliate presidents, NCTM representatives, and faculty advisors 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 member communication and access to on-demand professional development through their individual NCTM membership.

Q: Can an Associate Affiliate still contact NCTM Affiliate Relations for assistance?
A: Yes. Contact affiliates@nctm.org.

Q: How do we know that officer changes have been received by NCTM?
A: NCTM will confirm when officer updates have been made. Please review the attached profile sheet when received to ensure accuracy.

Q: Which Affiliates are eligible for a grant?
A: All Affiliates in Good Standing are eligible for a grant and are encouraged to apply.

Q: When does an Affiliate become Not in Good Standing?
A: If all required officers are not current; if the Affiliate president, NCTM representative, or faculty advisor (for Student Affiliates) are not current members of NCTM; or if affiliation dues have not been paid by the beginning of each fiscal year (June 1 to May 31).
FAQs about the Delegate Assembly and Regional Caucuses

Q: What is the Delegate Assembly?
A: The Delegate Assembly is NCTM’s formal structure for Affiliates and members to make proposed resolutions about mathematics education issues or Council operational issues.

Q: When does it occur?
A: The Delegate Assembly is held at every NCTM Annual Meeting & Exposition, usually on Thursday morning. The time and day may vary somewhat from year to year.

Q: Who can participate?
A: In May, the president and the NCTM representative of each Affiliate are invited to appoint one delegate and one alternate delegate to represent the Affiliate. Both may attend although only one person can vote. The delegate and alternate delegate must be current individual members of NCTM. Only Affiliates In Good Standing may 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. Proposed resolutions should be submitted to NCTM Headquarters, usually by July 15. Affiliates are encouraged to work with their NCTM Membership and Affiliate Relations Committee (MARC) 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 Membership and Affiliate Relations Committee (MARC). A proposed resolution can be referred (i.e., to another NCTM committee or to the Headquarters Office) or it can be presented to the Delegate Assembly. The MARC may also choose to return the proposed resolution to the Affiliate for more clarification.

Q: What happens when a proposed resolution is referred to an existing committee or to the Headquarters Office?
A: Topics or issues raised in proposed resolutions may currently be under discussion or have already been addressed by an entity within NCTM. Such proposed resolutions are referred to the appropriate NCTM entity for a response. Responses are sent to the submitting Affiliate and are included in the Delegate Packet, so that each Affiliate has time to review and discuss their position on the proposed resolution in preparation for the Regional Caucus and Delegate Assembly.

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 may suggest that 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 committee can return the proposed resolution with questions and/or recommendations for improvement.

Q: What happens if our Affiliate has a proposed resolution after the July deadline?
A: At most, one proposed resolution can be adopted by each Regional Caucus and presented to the Delegate Assembly. A resolution brought in this manner must be accompanied by a rationale and supporting evidence.

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 submitting Affiliate) in the Regional Caucus thinks the proposed resolution or response deserves more attention. The delegates then may suggest that further action is required, propose revisions to the resolution, or call for the delegates to 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 NCTM Annual Meeting & Exposition, and always before the Delegate Assembly. Regional Caucuses provide an opportunity for delegates, alternates, and other Affiliate leaders and NCTM members to discuss and revise current proposed resolutions. The MARC representatives preside over these two-hour Regional Caucuses and the NCTM Board of Directors can participate.

Q: What happens to resolutions that are passed by the Delegate Assembly?

A: 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 following the Annual Meeting. Affiliate leaders will be notified through the Affiliate News when actions have been posted. Following the Delegate Assembly, passed resolutions will be posted online in the Affiliate resources.

Q: What happens to the Delegate Assembly when there is no Annual Meeting?

A: The Delegate Assembly and Regional Caucuses are held with all in-person NCTM Annual Meetings. In the event that an in-person NCTM Annual Meeting is canceled, the Delegate Assembly will also be canceled.
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. Since state and local laws are so diverse, these issues require legal counsel. To assist Affiliates, the following questions and answers were prepared, which 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 not 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 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.

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 the IRS website or seek legal counsel.
Q: What insurance coverages are available for my Affiliate?
A: 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. 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 protects designated officers and directors of an organization from personal liability resulting from 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.

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 be 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 [https://www.ada.gov/](https://www.ada.gov/).

**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.
## 2022 Key Dates

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<th>DATE</th>
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<tr>
<td>March 15</td>
<td><strong>Affiliate Relations Guide</strong> updates</td>
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<td>March 15</td>
<td><strong>Renewal of Affiliation</strong> dues notice</td>
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<td>March 15</td>
<td>Deadline to Submit <strong>Publications Award</strong> Applications</td>
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<tr>
<td>April 15</td>
<td><strong>Publication Award</strong> Recipients Announced</td>
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<tr>
<td>April 20</td>
<td>Deadline for Early Payment Discount of <strong>Renewal of Affiliation</strong> dues</td>
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<tr>
<td>May 1</td>
<td>Deadline to submit <strong>MET Affiliate Grant</strong> Application</td>
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<td>Call for <strong>Resolutions</strong></td>
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<td>Call for <strong>Delegates</strong></td>
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<tr>
<td>June 1</td>
<td>Deadline for <strong>Renewal of Affiliation</strong> dues</td>
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<tr>
<td>July 15</td>
<td>Deadline to submit <strong>Resolutions</strong> to NCTM Headquarters</td>
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<td>July 15</td>
<td>Deadline for Affiliates to register <strong>Delegates</strong></td>
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<td>August 15</td>
<td>Delegate Packet emailed to registered <strong>Delegates</strong></td>
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<td>September 28</td>
<td><strong>Regional Caucuses</strong>: Los Angeles Convention Center, 2022 NCTM Annual Meeting &amp; Exposition</td>
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<tr>
<td>December 1</td>
<td>Open <strong>2023 Publication Award</strong> Applications</td>
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