

ASCD Affiliate Joint Dues Program Policies

The ASCD Affiliate Joint Dues Program is a revenue-generating benefit offered at no cost to affiliates in good standing. Through the joint dues program, ASCD accepts affiliate membership dues on behalf of the affiliate and sends all proceeds to the affiliate on a monthly basis. Participation in the joint dues program is optional for affiliates.

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1. The Affiliate Joint Dues Program

1.1. Member Communications

ASCD members start receiving renewal notices in the mail beginning in the 8th month of membership. Mailings include information about how to renew the member's ASCD membership and affiliate membership through the 11th month of membership. In the 12th month of membership and after membership expiration, the member will be asked only to renew or reinstate their ASCD membership.

Individuals who purchase an ASCD membership online are asked to check a box to join their local affiliate. The prospective member will be able to select their affiliate membership of choice from a dropdown menu.

1.2. How the Joint Dues Program Works

When a customer purchases an affiliate membership, ASCD collects the member information and affiliate membership dues. At the beginning of each month, Constituent Programs staff sends a report to the affiliate Joint Dues Manager in spreadsheet format with contact information for each new affiliate member who joined in the previous month. ASCD then issues a check in U.S. dollars for the affiliate membership dues corresponding to the report and sends it to the affiliate Joint Dues Manager.

2. Dues Pricing

Affiliates participating in the Affiliate Joint Dues Program set the dues amount charged to members. All affiliate dues amounts are listed in U.S. dollars. Affiliates may only charge one amount for membership through joint dues; the joint dues program does not support more than one dues amount per affiliate. Affiliates are given the opportunity to change the joint dues rate once a year. Affiliates must submit the new joint dues amount in the Affiliate Data Profile, which must be completed by July 31 of each year. The new joint dues amount will be incorporated into the ASCD billing system in the fall. Members may join the affiliate at the previous joint dues rate for up to 90 days after the implementation of the new joint dues rate. Joint dues reports for the first three months will reflect both joint dues amounts, and the affiliate will receive dues according to the amount paid by the affiliate members.

3. ASCD Dues Processing

3.1. Cancellation of ASCD Membership

ASCD members who wish to cancel their ASCD membership are **not** required to cancel their affiliate membership. Service consultants will remind customers that their affiliate membership will remain active even though the ASCD membership has been cancelled.

3.2. Cancellation of Affiliate Membership

Individuals may cancel their affiliate membership and receive a refund from ASCD if the cancellation is made within the same calendar month. For example, an individual may purchase

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an affiliate membership on October 2 and cancel their membership for a full refund by October 31. The record of this type of cancelled membership will not show up on the joint dues reports sent to affiliate Joint Dues Managers.

After the calendar month in which they have purchased their membership, individuals who wish to cancel their affiliate membership will be referred to the affiliate to request a refund. For example, an individual who purchases an affiliate membership on October 29 and wishes to cancel it on November 15 will need to contact their affiliate, as the membership funds will have already been transferred to the affiliate through the joint dues program. If ASCD processes a refund after the calendar month is over, the negative balance will be forwarded to the affiliate in the appropriate joint dues report and check. *Note: ASCD will cancel and refund an affiliate membership in a later calendar month if the cancellation is due to an error on ASCD's part.*

3.3. Transfer of Affiliate Membership

Individuals may transfer their affiliate membership if the transfer is made within the same calendar month. For example, an individual may purchase an affiliate membership on October 2 and transfer their membership by October 31. Only the individual receiving the transferred membership will show up on the joint dues report.

Individuals who wish to transfer their affiliate membership in a later calendar month will be referred to the affiliate to request the transfer. For example, an individual who purchases an affiliate membership on October 29 and wishes to transfer it on November 15 will need to contact their local affiliate, as the membership funds will have already been transferred to the affiliate through the joint dues program. *Note: ASCD will transfer a membership in a later calendar month if the transfer needs to be made because of an error on ASCD's part.*

3.4. Purchase Orders and Bill Me

Individuals who purchase an affiliate membership through a purchase order or "Bill Me" option will not be included in joint dues reports until ASCD receives and processes the funds for the full amount of the affiliate membership. Partial payments for affiliate dues will not be processed for purchase orders or "bill me" orders.

3.5. Partial Payment of Affiliate Dues

In some instances, individuals will send in affiliate dues via mail with a check for the wrong amount. The paid amount will be included and highlighted in the affiliate joint dues report with the individual's membership information, along with a note indicating the discrepancy. ASCD will adjust the affiliate dues price in the order's record, and the affiliate will be responsible for following up with the affiliate member regarding their outstanding balance. This policy is not applicable within the first 90 days after ASCD has changed the joint dues membership amount at the request of the affiliate; please see **Section 2, Dues Pricing** regarding the policy within the first 90 days of a dues amount change.

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3.6. Out-of-State Memberships

An individual may purchase an affiliate membership different from their state or province of residence.

3.6.1. Online Purchase: The local affiliate according to the address at which the individual receives ASCD membership benefits will be the default option for members who purchase or renew their membership online. The individual may select another affiliate from the dropdown menu before completing their order.

3.6.2. Over the Phone: An individual may request the affiliate membership of their choosing when purchasing membership over the phone.

3.6.3. Multiple Memberships with Different Affiliates: An individual may purchase two memberships for separate affiliates at one time, but this request must be processed over the phone with the assistance of an ASCD service center consultant.

3.7. Institutional Memberships

Individuals who purchase an ASCD institutional membership may purchase one affiliate membership as well. ASCD will associate the membership with the name of the primary contact for the institutional membership.

3.8. Special Promotions/Exceptions

3.8.1. Student Memberships: Individuals who purchase an ASCD student membership receive ASCD basic membership benefits for \$25 per year instead of \$49 per year. Individuals who purchase the student membership online cannot place an affiliate membership order at the same time. Individuals who purchase the student membership with the help of an ASCD service center representative may request an affiliate membership and purchase it over the phone.

3.8.2. Trial Memberships: Individuals who join ASCD through a trial membership access ASCD benefits for three months at no cost before deciding to join for a full year. Those who opt for the trial membership are not able to purchase an affiliate membership, since payment is not collected up front, and payment is required in order to be processed as an affiliate member.

3.8.3. Free Memberships with Purchase: In some cases, ASCD offers a free ASCD membership with the purchase of another product, such as Annual Conference registration. In this case, affiliate membership will not be an option with online or mail-in orders. Service Center consultants will offer the affiliate membership option to customers who place their order over the phone.

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3.8.4. Multiple Year Memberships: Individuals may purchase an ASCD membership for multiple years. However, an individual may only purchase one year of affiliate membership per order. An individual may buy two affiliate memberships on two separate ASCD joint dues orders (even if the purchases are made in the same month).

3.8.5. Multiple Concurrent Memberships: Some individuals may purchase two affiliate memberships in two separate orders, either in the same month, or over the span of 2-3 months. ASCD will include the individual's information in the applicable joint dues report and send the funds for the membership to the affiliate. If the individual's name is on the report, they have paid for another year of membership. It is the affiliate's responsibility to extend the affiliate membership for an additional year.

4. Joint Dues Report Processing

In order to assure the most accurate joint dues membership information, ASCD must reconcile all financial transactions at the beginning of each month for the preceding month before joint dues processing can begin; therefore the joint dues process starts approximately five business days after the beginning of each month. When the joint dues reports are ready, Constituent Programs staff members review them to identify any errors or inconsistencies. If the reports contain no errors, they are e-mailed to affiliate Joint Dues Managers. A check request for the joint dues amount is sent down to ASCD Financial Services, where the checks are issued within 7-10 business days and mailed to the Joint Dues Manager.

If the joint dues report contains issues that will impact the amount due to the affiliate, the Joint Dues Manager will receive an e-mail indicating that the report is delayed. Constituent Programs staff members work with ASCD Financial Services staff to resolve the issues and update the reports. Depending on the nature of the query, it may take several business days to resolve the issue and send the updated report. Please note that the resolution process for these queries will also delay receipt of the joint dues check.

4.1. Joint Dues Managers

Affiliate Joint Dues Program participants must appoint a Joint Dues Manager. The Joint Dues Manager will receive the Microsoft Excel (.xls format) spreadsheet reports with membership information as well as the monthly checks for affiliate dues from ASCD. The individual who receives the reports and the checks must be the same individual.

4.1.1. Transitioning the Joint Dues Manager Role to a New Person: The former Joint Dues Manager or affiliate executive director must notify ASCD of the new Joint Dues Manager by e-mailing constituentservices@ascd.org. The affiliate executive director should be copied on the e-mail if it comes from the Joint Dues Manager. The e-mail should include

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the name of the new Joint Dues Manager, their e-mail address, and the mailing address where joint dues checks should be sent.

4.1.2. Joint Dues Report Recipients: Affiliates may request that an individual other than the Joint Dues Manager be copied on the joint dues report e-mail. This recipient must be approved by the affiliate executive director.

4.2. The Report

Joint dues reports are sent via e-mail in Excel format (.xls) and include the member first and last name, address, city, state, zip code, phone and fax number, and e-mail address (if available). In addition, each joint dues report includes the following information:

| Column | What it means |
|----------------|---|
| ID | ASCD identification number. This number is unique to each individual in the ASCD Association Management System. |
| Order # | This number identifies the individual transaction with which the membership was purchased. If there is an issue with the membership, the order number is the easiest means to identify and resolve the issue. |
| Pref | Prefix, or salutation, such as Mr., Mrs., Miss, or Dr. |
| Company | This field is optional; if ASCD has the information, it will show up in the report. |
| Amt Paid | Amount Paid: This is the amount the member paid ASCD for affiliate membership. |
| Paid Date | The paid date reflects when ASCD received funds for the affiliate membership. |
| Org. Join Date | This date reflects the earliest join date on record in the association management system. This date does not account for lapses in membership or duplicate accounts. |
| Paid Thru | The paid thru date indicates the expiration date for the individual's ASCD membership, not the affiliate membership. The affiliate Joint Dues Manager determines the individual's affiliate membership expiration date, depending on affiliate processes and protocols for joint dues memberships. |

4.2.1. Expiration Dates: It is the affiliate Joint Dues Manager's responsibility to determine the expiration date of the affiliate membership. Please note that ASCD sends renewal notices based on an individual's ASCD membership expiration date, not based on his or her affiliate membership expiration date.

4.2.2. Joint Dues Report Queries: If an affiliate has a question regarding their joint dues report, the Joint Dues Manager can send an e-mail to constituentservices@ascd.org. In order to expedite the resolution process, the Joint Dues Manager should include the following information:

- The ID numbers of all affected members
- The order number(s) of the records in question

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- As much context as possible, explaining how the problem was found, what action, if any, has been taken by the affiliate to rectify the problem, and what history, if any, the affiliate has of the member(s) in question.

4.2.3. Special Requests: In order to ensure consistency, increase efficiency, and minimize the risk of error during the joint dues process, ASCD will not be able to accommodate special requests to change a report (or the reporting process) for an individual affiliate. If a change is made to the reports or the joint dues reporting process, it must be implemented for all participants in the joint dues program.

5. Joint Dues Program Responsibilities

5.1. ASCD Responsibilities

ASCD assumes responsibility for the following:

- To provide the most accurate joint dues information possible.
- To respond to queries regarding joint dues reports within one business day and resolve the queries within 3-5 business days.
- To keep accurate records enabling ASCD staff to send Joint Dues Managers copies of past joint dues reports dating back up to 24 months.
- If requested, to send the names and addresses (e-mail addresses not included) of all current ASCD members in the affiliate region for cross-checking and recruiting purposes. (ASCD recommends that affiliates request this report on a quarterly basis.)
- To acknowledge feedback from affiliates regarding suggestions for program improvement. ASCD will provide an explanation regarding why a suggestion can/cannot be implemented (Please refer to 4.2.3, Special Requests, regarding the nature of program feedback).

5.2. Affiliate Responsibilities

As a participant in the joint dues program, the affiliate responsibilities are as follows:

- To establish the expiration date for affiliate memberships processed through the joint dues program (see 4.2.1, Expiration Dates).
- To keep accurate membership records of all affiliate members.
- To deliver membership benefits to all affiliate members.
- To respond to cancellation and transfer requests from affiliate members who paid through the joint dues program (see 3.2, Cancellation of Affiliate Membership, and 3.3, Transfer of Affiliate Membership).
- To follow up with individuals who did not pay the full amount for membership through ASCD (see 3.5, Partial Payment of Affiliate Dues).
- To immediately inform ASCD via e-mail to constituentservices@ascd.org if the Joint Dues Manager contact information has changed (see 4.1.1, Transitioning the Joint Dues Manager Role to a New Person).

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- To work with ASCD staff to resolve issues with joint dues reports via correspondence with constituentservices@ascd.org (See 4.2.2, Joint Dues Queries)
- To share feedback with ASCD staff regarding the joint dues program and how it can be improved (Please refer to 4.2.3, Special Requests, regarding the nature of the feedback)

6. Joint Dues Program Discontinuation

An affiliate may be removed from the joint dues program at any time. The affiliate may request removal from the program by e-mailing constituentservices@ascd.org. ASCD may remove an affiliate from the joint dues program for non-compliance with the affiliation agreement or with ASCD policies and protocols governing affiliate responsibilities.