

# Membership Procedures

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## 1. New Member Applicants

Typically, potential members will first contact the Membership Department staff regarding their interest in joining NACUA. At this juncture, the staff pre-screens the applicant and determines their eligibility and the appropriate membership category. However, other applicants follow the descriptions of the membership categories as listed in the Association's marketing materials and web site and join based on their interpretation of where they belong. In either case, once the staff receives an application for membership, the following procedures for approving new member applicants are followed:

- Associate Members (includes both Associate Individual and Associate Institutional Membership)
  - a. Completed membership application is reviewed by Manager of Membership to make sure that all the sections have been completed, including the contact information, state bar and year admitted, any institutions the individual is representing, interest in joining NACUA, signed affirmation statement by applicant, and endorsement by a primary representative of a Member Institution. (*NOTE: endorsement not required for Associate Institutional Member applicants*)
  - b. Membership application information is then reviewed by Manager of Membership based on eligibility requirements, including joining at the highest membership classification possible and maintaining a commonality of interest with Member Institutions, including a requirement that the individual and/or firm has a demonstrated experience in higher education law. If the Manager of Membership decides that the applicant meets the standard eligibility requirements (including researching the applicant on Martindale-Hubbell's website to ensure they are an attorney in good standing), he or she will grant initial internal approval. Conversely, If the Manager of Membership decides that the applicant may not meet the eligibility requirements, further information will be requested of the applicant and depending on the response, the application will go forward, the applicant will be asked to reapply in another category, or will be told that they are not currently eligible for membership.
  - c. After the Manager of Membership performs the above steps, the application is presented to the Deputy Chief Executive Officer for further review. Similar to the Manager's procedure, the Deputy CEO may approve the applicant for a secondary internal approval or send it back to the Manager of Membership for further research of the applicant.

- d. If the steps outlined above are satisfied, then the application is presented to the Chair of the Committee on Membership and Member Services for final review prior to Board approval. Similar to the staff procedure, the Chair may grant provisional approval, recommend that the Committee have further discussion of the applicant, send it back to the staff for further research, or instruct the Manager of Membership to communicate to the member that they are not currently eligible for membership.
  - e. If the Chair of the Committee on Membership and Member Services recommends approval, the applicant is granted provisional membership in NACUA until the Board of Directors votes to provide full membership. The applicant receives notice that their application is under review by the Board of Directors and will be voted upon at the next meeting or conference call of the entity.
  - f. Currently, the Board of Directors votes on accepting provisional members during its meetings. For the 2002-20023 Fiscal Year, the Board will vote on members in October, November, February March, May and June. The Board is provided with synopses of the recommended applicants' applications. The Board provides final approval of the membership applicant (usually as a consent agenda item, without discussion, unless a Board member asks that the item be removed from the consent agenda). If Board approval is given, the member receives a welcome email, orientation packet, and a welcome call from a member of the New Member Welcome Group. The Board may also decide to have the Committee conduct further research on the member, or deny membership outright. If the application is denied, the decision is communicated to the individual by the Chair of the Committee on Membership.
- Institutional Members (includes applications for new college and university members)
    - a. Completed membership application is reviewed by Manager of Membership to make sure that all sections have been completed, including the contact information, state bar and year admitted, any institutions in addition to the applicant institution that the individual is representing, and a signed affirmation statement. The individual must also list the following information for the institution: two or four year, public or independent, agency or body which accredits the institution, and the number and names of campuses (if more than one).
    - b. Membership application information is then reviewed by Manager of Membership based on eligibility requirements, including determining whether the institution is an accredited college or university (or system of accredited colleges and universities). If there is any question, the staff will contact the applicant and ask for additional clarification.

*(NOTE: The Manager will assume the individual applying on behalf of the institution meets the necessary eligibility requirements—attorney in good standing, regularly engaged to handle the legal affairs for the institution, etc.--and no further research is conducted based upon the representations made on the application form.)*

- c. After the Manager of Membership is satisfied with the review of the application, the membership will be processed and the applicant will become a member of NACUA, needing no further approval. The primary representative (and additional representatives if provided at the time of applying) will receive a welcome email on how to access the computer-based resources available to members. A few weeks later, the primary representative (and additional representatives if applicable) receives a welcome packet of information from the Chief Executive Officer about the benefits and services of membership that are now available. Upon receiving the orientation packet, the new member will also receive a welcome call from a member of New Member Welcome Group.
- Additional Representatives—**during membership year** (Member Institutions and Associate Member Institutions)
    - a. The “Adding a New Representative to your Institution” form is submitted to the Manager of Membership who ensures that all the sections have been completed, including the contact information, state bar and year admitted, and signed approval of the primary representative of the institution.  
*(NOTE: An institution changing its primary representative must submit an “Adding a Primary Representative to your Institution” form for review by the Manager of Membership. The procedures for review are the same.)*
    - b. The staff defers to the judgment of the primary representative (based on the signed approval) when adding an additional representative to an Institution’s roster. If there is any question to the individual’s eligibility, the staff will contact the primary representative and he or she will be asked for additional clarification.
    - c. After the Manager of Membership is satisfied with the review of the form, the addition to the roster will be made and the individual will become a member representative of the NACUA member institution, needing no further approval. The member representative will receive a welcome email on how to access the computer-based resources available to members. A few weeks later, the member representative receives a welcome packet of information from the Chief Executive Officer on the full benefits and services of membership. The primary representative is copied on this correspondence. Upon receiving the orientation packet, the new member will also receive a welcome call from a member of New Member Welcome Group.

- Additional Representatives—**during renewal period** (Member Institutions and Associate Member Institutions)
  - a. During the renewal period, the edited membership roster form is submitted to and reviewed by the Membership Assistant to make sure that all the necessary contact information (address, phone, fax, email) has been provided for **new** additional representatives and the affirmation statement is signed on behalf of the new representative by the primary representative. If any information is missing, the primary representative will be contacted to provide the remaining information. *(NOTE: Even if no changes are made to the roster, the affirmation statement must be signed and returned to NACUA.)*
  - b. After the Membership Assistant corrects any missing contact information, the addition to the roster will be made and the individual will become a member representative of the NACUA member institution, needing no further approval. The member representative will receive a welcome email on how to access the computer-based resources available to members. A few weeks later, the member representative receives a welcome packet of information from the Chief Executive Officer on the full benefits and services of membership. The primary representative is copied on this correspondence. Upon receiving the orientation packet, the new member will also receive a welcome call from a member of New Member Welcome Group.

## 2. Membership Renewals

The membership year runs from September 1 through August 31. Membership renewal notification occurs on an annual basis in July. A packet of information, including a letter from the Chief Executive Officer, a dues invoice and a current membership roster are sent to the primary representative of each Member Institution, the primary representative of each Associate Member Institution, and all Associate Individual Members, respectively. Members are asked to remit payment for membership along with a signed roster form. On this form, changes may be made as necessary. This information is critical to the completion of the Membership Directory in the fall.

- Associate Members (includes both Associate Individual and Associate Institutional Membership)
  - a. Completed and/or edited membership roster form is reviewed by the Membership Assistant to make sure that all the necessary information has been provided, including contact information (address, phone, fax, email) for any new member representatives and signature of the affirmation statement by the primary representative or Associate Individual member, as necessary. If any information is missing, the primary representative of the Associate Institutional member will be contacted to provide the remaining information and/or signature. Associate Institution Member primary representatives are required to sign the affirmation statement on the roster form and return it to NACUA. Failure to sign the form may eventually result in the termination of the Associate Institution's membership. If any information is missing in the case of Associate Individual members, the individual will be contacted to provide the remaining information and/or signature. Associate Individual members are required to sign the affirmation statement of the roster and return it NACUA. Failure to sign the form may eventually result in the termination of Associate Individual's membership.
  - b. Once the form is returned and completed to the satisfaction of the NACUA staff, the Membership Assistant will make the necessary changes to the database records and the member will be renewed in the database.
  - c. If an Associate Individual member changes employers during his/her membership, they are required to get re-endorsed by an appropriate primary representative of a Member Institution.

- Institutional Members
  - a. Completed and/or edited membership roster form is reviewed by the Membership Assistant to make sure that all the necessary contact information (address, phone, fax, email) for any new member representative is included. If any information is missing, the primary representative will be contacted to provide the remaining information. Member Institution primary representatives are required to sign the affirmation statement on the roster form and return it to NACUA. Failure to sign the form may eventually result in the termination of the Member Institution's membership.
  - b. Once the form is returned and completed to the satisfaction of the NACUA staff, the Membership Assistant will make the necessary changes to the database records and the member will be renewed in the database.

### **3. Orientation Procedures for New Member Representatives and Associate Individual Members**

Once a new member's contact information is added into the membership database, they are eligible to receive membership benefits. The following is a list of procedures to assist in orienting these individuals to the benefits and services that are afforded to them as new member representatives and Associate Individual members.

- a. Upon being entered into the membership database, the Membership Staff Assistant generates a welcome email that is sent to the individual highlighting the electronic membership services that are available for immediate access, including how to sign up for NACUANET.
- b. Approximately 2 to 4 weeks after the welcome email is sent, a membership welcome packet is prepared and sent to the new member. These packets are sent in batches. Included in the packets are the following: welcome letter from CEO, current Director of Membership and Services, current *Journal of College and University Law*, Membership Brochure, List of Benefits and Services, Publications Catalog, Program marketing.
- c. Approximately 1 month after the membership welcome package is sent, a volunteer of the New Member Welcome Group are asked to contact the new member to personally welcome them into NACUA and to see if they have any questions about the orientation materials they had received. Like the previous mailing, the names of new members are provided to volunteers in batches.
- d. Approximately 1 month after the New Member Welcome Group volunteer makes his or her contact, a letter is prepared by the Membership Staff Assistant on behalf of the Manager of Membership and Outreach Services that focuses on the benefits of being an active member of the organization and what volunteer opportunities are available.

- e. One year after a new member has belonged to NACUA, a brief, open-ended satisfaction survey is emailed for their completion. The results are tabulated and reported on by the Manager of Membership and Outreach Service

#### 4. Cancellation of Members

Cancellation of members and member representatives is defined here as either voluntary withdrawal from NACUA, failure to remit membership payment, or failure to remit completed documentation (i.e. signed affirmation statement).

- Institutional Members, Associate Institutional Members, Associate Individual Members
  - a. Upon written notice of request for cancellation, the member is contacted to provide a reason for cancellation if a reason was not provided in the request. In the case of non-payment of dues or failure to remit completed documentation, the Manager of Membership will follow up with the representative to verify the cancellation.
  - b. In the case of Associate Institutional and institutional members, the Membership Assistant will cancel the membership of the institution and all its member representatives. In the case of an Associate Individual member, the Membership Assistant will cancel their membership. Membership benefits and services will cease being provided.
  - c. A follow-up letter is sent from the Chief Executive Officer to the primary representative or Associate Individual member reminding them of the benefits of membership. The Manager or Membership follows up this correspondence with a call.
  - d. On the anniversary of their cancellation, the former member will be contacted about reconsidering membership in NACUA.
- Additional Representatives
  - a. Upon notification from the primary representative on the “Canceling a Representative” form or on the Membership Roster form during renewal, an additional representative will be removed from the member’s roster. If the notification comes from the representatives themselves, the individual will be removed and the primary representative will be notified. *(NOTE: Only the primary representative can remove a representative from the membership roster of their institution.)* b. The Membership Assistant will remove the individual from the membership roster and all benefits and services will cease being provided.

## **5. Termination of Members**

Termination of members and member representatives is defined here as the involuntary removal of members from NACUA because the member no longer meets the eligibility requirements as stated in Article III of the NACUA By-Laws and the Membership Policy Statement.

- Institutional Members, Associate Institutional Members, Associate Individual Members

### **SELF DISCLOSURE OF A MEMBER'S POTENTIAL INABILITY TO MEET ELIGIBILITY CRITERIA**

- a. A primary representative of a Member Institution, a primary representative of an Associate Member Institution or an Associate Individual Member is required to promptly disclose to NACUA any change of circumstance that may preclude the attorney's or institution's ability to abide by the membership eligibility requirements of the Association. The Manager of Membership then forwards this information to the Committee on Membership for further consideration.
- b. The Committee on Membership, with the assistance of the staff, will review the disclosure of the member and decide whether the change of circumstance would preclude the attorney's or institution's ability to abide by the membership eligibility requirements of NACUA. If it is decided that this change does not jeopardize the attorney's or institution's membership, the Committee Chair will notify the member or representative. If it is decided that this circumstance does render them ineligible for membership, the Committee will recommend that the Board of Directors terminate the membership of this entity or representative.
- c. After reviewing the termination recommendation of the Committee on Membership and Member Services, the Board of Directors would vote on whether to terminate the member or representative. The Chair of the Committee on Membership will communicate the decision to the member or representative.

### **SUGGESTION OF A MEMBER'S POTENTIAL INABILITY TO MEET ELIGIBILITY CRITERIA**

- a. It comes to the attention of the Manager of Membership through an independent source that a Member Institution and/or its primary representative, Associate Member Institution and/or its primary representative or an Associate Individual Member may be in violation of the membership eligibility standards as defined in the By-Laws and Membership Policy Statements of the Association.

- b. The information is then forwarded to the Committee on Membership, and with the assistance of staff, further review of the alleged violation occurs, including contacting the member or representative in question. Upon review, the Committee decides whether a recommendation for termination should be made to the Board or that the change in circumstances does not jeopardize the member's or representative's eligibility for membership.
  - c. After reviewing the termination recommendation of the Committee on Membership and Member Services, the Board of Directors would vote on whether to terminate the member or representative. The Chair of the Committee on Membership will communicate the decision to the member or representative.
- Additional Representatives
  - a. It comes to the attention of the Manager of Membership through an independent source that an additional representative of a Member Institution or Associate Member Institution may be in violation of the membership eligibility standards as defined in the Bylaws and Membership Policy Statements of the Association. The Manager will relay the information to the primary representative of the Member Institution or Associate Member Institution.
  - b. The primary representative will be asked to review the matter further and take whatever appropriate action is necessary to meet the eligibility requirements of membership for the institution and its member representatives.