

Membership

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GENERAL

This practice defines the rules and procedures relative to membership in the TelecomPioneers, and addresses the various categories of membership, summarizes guidelines for membership reporting and membership committees, and lists the qualifications required of participating sponsor companies. The dues incurred by the members are also provided.

The strength of any organization resides in its membership. For the TelecomPioneers to remain the volunteer organization of choice for its members, communities and sponsoring companies, it must have a well-planned and managed approach to attracting, motivating and retaining new members as the telecom industry continues to change significantly.

In their efforts to recruit new members and increase participation, it is important that Pioneer chapters, councils and clubs emphasize the benefits of Pioneering not only for employees and members, but for their communities and companies as well. These efforts should stress the leadership and skills development opportunities available in Pioneering, the sense of satisfaction and the heightened teamwork among co-workers that comes from helping others and the overall role community service activity plays in maintaining the positive, socially conscientious image of the sponsoring companies.

MEMBER BENEFITS

As a membership organization, not only do we ask employees and retirees of our sponsor companies to volunteer and perform community service in the name of their company, but we also ask them to pay a membership fee to join our organization.

We all know the intrinsic benefits of Pioneering are many: the fellowship, fun, and the feelings one gains by helping others and improving their community serve as rewards alone. Pioneers repeatedly tell us that the reason they do what they do is because of the feeling they get from helping others. This touches upon the community service aspect of our organization well- it helps us motivate newly recruited members to participate in projects. However, we want people to do more than volunteer with us- we want them to join and pay dues; dues which will fund our projects and allow us to continue to do what we do so well. Most volunteer organizations don't ask people to pay them to volunteer. We must be able to offer members something in return for their dues

In response to this aspect of recruiting members, the association team has developed a member benefits package full of special discounts and offers available exclusively for Pioneer members. Information and materials for distribution are available on the association website at www.telecompioneers.org. Also, copies of the Member Benefits ToolKit may be requested in CDROM format from the association office.

WHO IS ELIGIBLE FOR MEMBERSHIP?

Effective October, 3, 1994, all past and present employees of the qualifying companies (or their subsidiaries) listed in Article II, Section 1, of the Association constitution are eligible for membership. (For convenience, the qualifying companies are listed below.)

Other membership classifications are discussed elsewhere in this practice. Any questions on eligibility not specifically addressed in this practice should be referred to the Association staff for clarification.

Qualifying Companies

Per Article II, Section 1 of the TelecomPioneers constitution, "To be eligible for admission to membership, an individual must be a past or present employee of a current or past sponsor company. Current sponsors include: Aliant, AT&T, BellSouth Corporation, Cincinnati Bell, Frontier Communications Corporation, Manitoba Telecom Services, Qwest, SaskTel, SBC Communications Inc., Telcordia Technologies, Inc., Verizon, or any subsidiary of the foregoing companies.

Employees of the foregoing companies or their subsidiaries shall be eligible to be regular members and shall be reflected as such in Association membership eligibility statistics.

A listing of qualified member companies in each region shall be maintained by the Association Chief Executive Officer. The listing shall be approved and amended by majority vote of the Board of Directors of the Association.

Some regular members, a category of membership defined below, may not be employees of the listed qualifying companies. They may continue their membership, however, provided they continue to pay dues. They also will be eligible for Life Membership in accordance with the provisions of Article II, Section 4, of the Association constitution and this practice.

Admission of New Sponsor Companies

Effective September 19, 1988, the Association constitution and bylaws were amended to give the Association Board of Directors the authority to add or decertify sponsor companies.

Guidelines for Admission of New Sponsor Companies (found at the end of this practice) outlines the sponsorship criteria and procedures required of companies requesting membership in the Association.

MEMBERSHIP CLASSIFICATIONS

Regular Membership

TelecomPioneers who are employees of any of the qualifying sponsor companies (or their subsidiaries) or who have left the company without qualifying for Life Membership are known as *regular* members and shall be responsible for annual dues payment.

Life Membership

Regular members who retire from employment with a qualifying company and receive a service pension shall be granted Life Membership, effective the day following retirement. Life Members are entitled to all membership privileges, but are exempt from the payment of dues. Regular members who otherwise leave the employment of a sponsor company may remain regular members and are subject to the payment of dues until the age of 55, when they may apply for Life Membership.

Disability pensioners are given special consideration. Disability pensioners who were granted Life Membership may be reclassified as regular members if they are later returned to active employment.

Other information on the granting of Life Membership is provided later in this practice under the subsection titled “Membership Status and Eligibility After Leaving A Qualifying Company”.

Affiliate Membership

Any Life Member who lives in or moves into an area under the jurisdiction of another chapter and establishes a permanent residence and stays there longer than six months during a span of 12 consecutive months may be granted affiliate status in that chapter and its subordinate units.

Affiliate members of a chapter are entitled to the same privileges as other members of the chapter’s Life Member clubs. They may hold office in the Life Member club and have the right to vote in all Life Member club matters. They retain the right to vote in their home chapter’s affairs. Affiliate members shall also be entitled to such additional privileges as the chapter executive committee may designate, including the right to vote, hold office and serve as a member of the executive committee, except that in no case will these privileges include the right to hold office in both the affiliate and home chapters simultaneously. Additional information on affiliate members is provided later in this practice under Transfer of Membership.

Honorary Membership

Honorary membership may be granted to any person making a truly unusual or outstanding contribution to the TelecomPioneers or the telecommunications industry.

However, such membership is not conferred upon anyone who could otherwise attain eligibility as a regular or Life Member.

Candidates for honorary membership must be unanimously recommended by the chapter executive committee, concurred in by the Association vice president of the group, and unanimously approved by the Association subcommittee on membership and the Association Board of Directors. In addition, an application for honorary membership may be prepared and presented by a group vice president.

Honorary members do not have the right to vote or hold office, but are entitled to all other membership privileges and may wear the Pioneer emblem. Honorary members are exempt from dues.

Procedures and a form for submitting requests for honorary membership can be found later in this practice in the section titled Guidelines for Honorary Membership.

Associate Membership

The chapter executive committee may grant Associate membership to the designated Partner of a deceased regular or Life Member who so desires. Associate membership recognizes the long-term relationship between the organization, a Pioneer and his or her family.

An associate member may wear the Pioneer emblem and is entitled to such privileges as the chapter executive committee may designate, including the right to vote, hold office or serve as a member of the executive committee at the club level only. An associate member shall be exempt from the payment of dues.

Note: If the deceased Pioneer had been a Life Member, or if the Partner of a regular member is of the relative age of Life Members, the activities and fellowship of a Life Member club could be especially therapeutic and helpful to the individual. The club should extend appropriate invitations. A periodic follow-up through normal contacts also is recommended to determine whether each associate member still wishes to participate in activities or receive publications.

Pioneer Partners

Pioneer Partner status is automatically bestowed upon the spouse of a regular member or Life Member. Additionally, another family member or other individual designated by the Pioneer may serve as his/her Pioneer Partner.

A Pioneer Partner is entitled to such privileges as the chapter executive committee may designate, except that in no case shall these privileges include the right to vote or hold elective office. Pioneer Partners are exempt from the payment of dues.

Other Cases

Other cases involving eligibility that are not covered by these rulings should be referred to the Association staff.

APPLYING FOR MEMBERSHIP

Anyone who is to be admitted to membership fills out a local application and pays the required dues discussed later in this practice.

TRANSFER OF MEMBERSHIP

Typically, an employee becomes a member of the chapter that has jurisdiction over his or her work location. However, where feasible, membership may be transferred to the chapter having jurisdiction over the member's residence location if the transfer would allow the member to participate in Pioneering more fully.

In cases where a regular member is transferred to a new business location, the individual has the option of retaining the home chapter membership or transferring membership to the chapter that covers the new business location. The new chapter should contact the individual and arrange the transfer of membership, if desired. Any questions involving extenuating circumstances should be reviewed with the Association staff.

Life Members who move into the territory of another chapter may become affiliate members of that chapter. Life Members who affiliate with another chapter should be advised that their permanent membership continues to reside with the chapter that granted them Life Membership. Life Members can also apply for a membership transfer.

TERMINATION OF MEMBERSHIP

Membership terminates when a member resigns from the Pioneers, is removed for non-payment of dues, or dies.

Regular or Life Members who resign from the Pioneers, in writing, shall have their names removed from the chapter's membership rolls effective that same date. In the case of regular members, current-year dues are not refunded. However, prepaid future-year dues may be refunded upon request provided the resignation takes effect before the start of the new Pioneer year.

Whenever a member resigns, the chapter administrator/Pioneer manager should inform that person in writing that the request has been granted. This letter also should express the organization's regret and state the conditions upon which membership may be reinstated (see below).

Regular members who fail to pay their annual dues by the end of the Pioneer year (December 31) may be removed from the chapter's membership rolls effective January 1.

REINSTATEMENT OF MEMBERSHIP

Regular Member

A regular member who resigned or was removed may be reinstated to membership. Reinstatement is effective upon the chapter's receipt of a written request and the payment of \$15 in dues for the current year. A reinstated regular member need not fill out an application card and will not receive a new membership card unless the original was lost or destroyed.

Life Member

A Life Member who resigned may be reinstated as a Life Member. Reinstatement is effective upon the chapter's receipt of a written request. A reinstated Life Member need not fill out an application card and will not receive a new membership card unless the original was lost or destroyed.

MEMBERSHIP STATUS AND ELIGIBILITY AFTER LEAVING A QUALIFYING COMPANY

Membership and eligibility need not cease when regular members or employees leave the active service of a qualifying company.

Assuming these regular members have not left the company on a service or disability pension, which would make them eligible for Life Membership, they may continue as regular, dues-paying members until the age of 55, at which time they may apply for Life Membership.

Former employees who were not eligible for membership under Association requirements in effect at the time they left the company may become regular members. As regular members, these individuals are subject to the annual payment of dues until the age of 55, when they may apply for Life Membership. To be eligible for Life Membership, these employees must be regular members at age 55.

Former employees who never became regular members despite being eligible under Association requirements in effect at the time they left the company may also subsequently be granted regular membership. To be eligible for Life Membership, these employees must be regular members at age 55.

Disability pensioners who were granted Life Membership may be reinstated at any time as regular members.

A Life Member who is re-employed by the same qualifying company has the option to pay dues as a regular member or remain a Life Member. This treatment does not apply to those individuals who have retired and are working for the company on a consulting basis or who become employed by a qualifying company other than that from which they retired. Their status as Life Members does not change and dues, therefore, are not collected.

DUES

Dues are defined as the annual sum of \$15 required from each regular member, payable at the beginning of the year, January 1. At sponsor company option, chapters may waive the first-year dues.

Regular members continue to pay dues for as long as they are employed by the sponsoring company, even if beyond the age of 65. Regular members who have left the company without becoming Life Members continue to pay dues until the age of 55, at which time they may apply for Life Membership.

Waiver of Dues

The chapter executive committee may waive the payment of the current year's membership dues under the following circumstances:

- When a member is on an authorized leave of absence from the company during most or all of the membership year, or
- When a member suffers, for whatever reason, from financial hardship, or
- Other reasons as deemed appropriate, with the concurrence of the group Association vice president.

Refunds of Dues

Current-year dues are non-refundable. The refunding of prepaid future-year dues is discussed earlier in the practice under Termination of Membership.

Transfer/Adjustment of Dues

When a regular member transfers to another chapter, there is no adjustment between the chapters for membership dues already paid. If the regular member who transfers has yet to pay the annual dues, the chapter to which the member is transferred collects and keeps the dues for that year.

If members are transferred in the course of the creation of a new chapter, the old chapter transfers a prorated sum of money to the new chapter based on the number of members moved and the average dollars per regular member in its treasury.

GUIDELINES FOR HONORARY MEMBERSHIP

Individuals who have rendered truly outstanding service to the TelecomPioneers Association or the telecommunications industry may be proposed for honorary membership. Individuals who render outstanding service on a local basis should not be recognized with an honorary membership, but may be recognized by the local chapter or region through its local awards program. An individual may be proposed for honorary membership in the following manner:

1. Each year the chapter executive committee should review the merits of individuals who, in their opinion, meet the criteria for honorary membership. In proposing a candidate, the chapter executive committee should determine that the service rendered may be in conjunction with ongoing TelecomPioneers programs or new programs that have Association-wide application. Also, the service rendered may be to the telecommunications industry itself.
2. Upon unanimous approval of the chapter executive committee, an application for honorary membership is completed in detail and forwarded to the Association vice president from the group. Although supporting data may be attached to the application, the written recommendation should not exceed 500 words (see attached sample application form).

In addition, a nominating application for honorary membership may be prepared and presented by an Association vice president.

3. After complete familiarization with the application, the Association vice president from the group approves or disapproves the request. With approval, the application is forwarded to the chairperson of the Association Member Relations subcommittee. The application should reach the chairperson at least 30 days prior to the next Association Board of Directors meeting.
4. The TelecomPioneers Member Relations and Recognition subcommittee may query the sponsors of the candidate to satisfy itself that the service performed by the candidate is ***extremely outstanding*** and of benefit to the Association or the telecommunications industry. It should also be satisfied that the duration of the service rendered is appropriate to the recognition. Each application that receives

unanimous approval of the subcommittee will be reproduced and forwarded to all Association officers. All applications should be received by the Association vice presidents at least 10 days prior to the next Association Board of Directors meeting.

5. The Association vice president from the submitting group will present the recommendation for honorary membership to the Association Board of Directors at its meeting. Unanimous approval is required.
6. Applications not approved by the TelecomPioneers Member Relations and Recognition subcommittee will be returned to the submitting vice president. A transmittal letter from the chairperson of the TelecomPioneers Member Relations and Recognition subcommittee will merely state that the candidate did not qualify for honorary membership.
7. Candidates for honorary membership should not be aware that they have been proposed for honorary membership. They should be advised only after unanimous approval by the Association Board of Directors.

APPLICATION FOR TELECOMPIONEERS HONORARY MEMBERSHIP

We hereby propose for honorary membership in the TelecomPioneers,

_____, whose address is

_____.

This nominee's outstanding contribution to the Association or to the telecommunications industry is described below:

Approved: _____ Approved: _____
Chapter President on behalf of Executive Committee Association Vice President

Approved: _____ _____
Chairperson - Association Member Relations and Recognition Subcommittee Date

MEMBERSHIP REPORTING

It is important to keep accurate records of your membership data. Every company has different forms and systems that are used in membership reporting. You should refer to whatever internal practices your company has to determine what forms need to be filled out and processed in order to update your chapter's Pioneer information.

The following information regarding membership records is intended to be used only as a guide; and the Pioneer leaders responsible for keeping records are encouraged to make any changes that will simplify their own record keeping.

Minimum Information to Record

At an absolute minimum, the following items should be tracked by each chapter:

Personal History

- Name
- Social security number (USA only)
- Home address
- Email address
- Home telephone number
- Date of birth (month and day only)
- Name of Partner
- Deceased date

Company History

- Name of company
- Business address
- Business telephone number
- Date of employment
- Organization name/department/title

Pioneer History

- Chapter name and address
- Date membership granted
- Date life Membership granted
- Method of paying dues (via payroll deduction or billing statement)
- Date resigned, dropped, reinstated

Other Desirable Information

Many chapters have found it useful to maintain other membership information, such as a list of the skills/interests a particular member brings to Pioneering, or a notation that a

particular eligible has asked the chapter to refrain from contacting him/her about becoming a member. In addition, chapters might consider recording the following data:

Company History

- Payroll number
- Class of pension (disability, vested or service)
- Position hired into
- Position at time Pioneer membership was granted
- Position at retirement

Pioneer History

- Name of chapter, council, club
- Transfer from _____ chapter (with date)
- Transfer to _____ chapter (with date)
- Type of membership
- Emblem presented (date)
- Membership card and/or certificate presented (date)
- Positions/offices held in Pioneering (with dates)
- Participation community service, fundraising, etc.
- Current activities
- Interest in or plans for future activities

Sources of Information

Chapters have different sources for obtaining the basic information they maintain on their members. Nevertheless, chapters must have a routine to ensure a continuous flow of new and changed data.

As sponsor companies revise their own record-keeping routines, the chapters must ensure that they receive the data essential to Pioneer membership records. The speed at which certain critical information reaches the Pioneer administrator or Pioneer unit leaders is particularly important (for example, in the death of a Pioneer).

The following sources of information have proven to be most useful:

- Company human resources or personnel organizations
- Company benefit departments
- Company payroll organizations
- Company media
- Company organization notices
- Local Pioneer publications
- Chapter and/or group websites

Format of Records

While each chapter can best satisfy its own needs by devising a format for maintaining information, a form or computerized report should meet certain objectives. The data

should be transferable among councils and chapters. The capability of sorting by special categories (e.g., home location, council or club, company involved, membership type) should also exist.

Membership reporting On the PA-7

In addition to processing your company's internal membership information, it is important that you update the Association's database with the raw numbers regarding the increase or decrease of your regular members and Life Members. This is done by updating the membership section of the Association's PA-7 report. You should update your membership information at least quarterly using the Association's PA-7 web site. Detailed instructions on how to update the PA-7 membership information can be found in the Pioneer practice section titled **Defining Community Service Projects and Reportable Volunteer Information**.

MEMBERSHIP COMMITTEE

The following information describes the responsibilities of the Membership Committee.

Duties and Responsibilities

Since the membership Committee usually introduces a prospective member to the TelecomPioneers, it is one of the most important committees of a Pioneer chapter, council, or club. This committee not only tries to enroll all who are newly eligible for Pioneer membership, but it also must try to interest those who have been eligible for some time but have never joined, and to enroll again those who may have resigned or have allowed their membership to lapse. The work of this committee is therefore a continuous and never-ending selling job if Pioneering is to be shared with all who are entitled to enjoy its privileges and activities.

The Chairperson

The chairperson of the Membership Committee should be someone capable of inspiring committee members to take a very active part in the membership program. This individual should be energetic and enthusiastic about Pioneer work and be able to transmit this energy and enthusiasm to others. A chairperson should not only be thoroughly familiar with Pioneer goals, but should also be able to interpret them. A liking for people and the ability to bring out the best in others are traits which will help this individual to be a capable leader and to head a strong and enthusiastic committee.

In some chapters, the first vice president automatically becomes chairperson. In others, the first vice president may act as advisor to the committee, keeping in close touch with it. In any case, the experience and contacts of membership work in invaluable preparation for the job of chapter president.

Often, it is desirable to extend the term of office of a chairperson of the Membership Committee to 2 years or longer depending, of course, on an individual's ability and willingness to serve. If the committee is chaired by the chapter first vice president, extending the term of office past 1 year may not be possible since a chapter first vice

president normally succeeds the president in office after serving 1 year as first vice president.

If not already a member of the Executive Committee, the Membership chairperson should be invited to attend Executive Committee meetings. The experience will provide a better understanding of how this unit functions and what its programs and future plans are. This knowledge should strengthen the Membership Committee's campaign to attract new members.

Committee Members

Most chapters agree that the Membership Committee should be as large as necessary to increase the chances for easy personal contact with every eligible employee. The more representatives available for making contacts, the better. This will also ensure that a representative can be placed in every feasible location throughout the chapter territory.

However, the size of the committee should depend on the number of eligibles and their location within a chapter, council or club. The committee must be large enough to assure a thorough job. In addition, selection of committee members should take into consideration departmental representation and be a balance of experienced and new members.

In some chapters, group representatives are asked to assume duties usually delegated to the Membership Committee. The group representative is appointed to keep in touch with all members in a particular unit or group. The whole chapter, council, or club is divided into units of about 10 to 15 members. It is the group representative's duty to keep these members informed about all matters which concern Pioneers in general and the members of the group in particular (such as community service projects and social events). The members within a group are, in turn, a source of information about cases of illness and other events. Because the group representative is responsible for only a small number of members, the task of inviting eligible employees to become members might be assumed as an added duty.

Routines and Records

Local routines should be set up so that the chairperson of the Membership Committee will receive, on a regular and automatic basis, the names of employees eligible to become Pioneers. These records of eligibles for Pioneer membership should be kept up to date at all times.

Records should also be kept of all interviews that do not result in the eligible's becoming a member, with reasons for not joining carefully noted. A regular routine should be established to make sure that these records are maintained. Analyzing this information can be an aid to committee members who make subsequent contacts with the same eligibles.

Routines should be established for transmitting to the Membership Committee chairperson all membership matters that come to the attention of the chapter Pioneer

leaders. Close cooperation between chapter Pioneer administrator/leader and the committee chairperson is desirable – both for conducting a membership campaign and for the day-to-day work of the Membership Committee.

Meetings and Planning

The chairperson should hold frequent meetings with the members of the committee, beginning with a training meeting before or at the start of the year. It is important to review the committee's objectives and goals at these sessions as well as the experience of the various members. One committee member's successful treatment of a problem can provide guidance for all the others.

Organizing a membership campaign, when that becomes necessary, takes careful planning but can also be a lot of fun and highly successful. (Please refer to the membership recruiting and activation guide titled ***JUST ASK!!*** for detailed information on membership campaigns and be sure to obtain member benefits materials from the association website or CDRom.) Every worker should be briefed on how to approach prospective members. In the case of some eligibles of long standing, it helps to choose the interviewer carefully and to brief the individual thoroughly about previous unsuccessful interviews.

Membership is closely tied in with all other phases of chapter activities. **In fact, more than any other, this phase of Pioneering includes the entire chapter.** Every employee is a potential Pioneer and every method of recruitment should be reviewed to try to encourage all employees to join the Pioneers. Much of the chapter's success in enrolling new members depends on the attitude of those who already belong. Their interest, their friendliness, and their enterprise influence the decision of prospective members who are invited to join. Promoting an accurate perception of who Pioneers are and the kinds of projects opportunities that are available is very important. Be sure to utilize a diverse team of recruiters at each location.

A good Membership Committee will do all it can to make all members membership conscious. It will make sure that all Pioneers know the names of the committee members and how to get in touch with the one nearest them.

If all members of a chapter would take advantage of their opportunities to put in a good word for their chapter and would take a personal interest in those eligible to join, the result would be a steady climb in the number of chapter members. It would also result in a better chapter. **Membership, then, is every member's job!**

AFFILIATE MEMBERSHIP, CHANGE OF ADDRESS OR TRANSFER REQUEST FOR LIFE MEMBERS (PA-8A)

Company benefit offices should inform their chapter Pioneer leaders/managers promptly when they receive any change in a Life Member address. Life Members, in some cases, take the initiative and tell their home chapter Pioneer manager/membership person that they are changing locations, giving details of where they can be reached.

When a Life member moves, the home chapter administrator should initiate a PA-8A form (attached) to request that the individual be contacted regarding affiliate membership in the new chapter. The PA-8A should be forwarded promptly to the new chapter administrator/manager so that contact can be made and the Life Member welcomed to the nearest club. Because thousands of Life Members enjoy the benefits of affiliate membership, it is important to avoid delays in forwarding their information to the new chapter.

The Pioneer membership person/manager of the home chapter should always enter the information required under “personnel information.” The heading “Pioneer background or interest” requires particular attention. Information here should include any Pioneer office held in the chapter, council, club or Life Member club as well as hobbies, community service work and any other activities that are of particular interest to the Life Member.

Form PA-8A may also be initiated by the Pioneer manager/membership person of the new chapter when advised by the Life Member of the move, new address and desire to affiliate with the new chapter. The procedure is similar to the home chapter initiation of the form, except that the paper flow is reversed.

The Pioneer administrator/manager who prepares the form (for either the home or new chapter) should send two copies to the other chapter Pioneer manager/membership person, who in turn should process the form immediately and return one copy to the originator. Only after the supporting document is returned is the Life Member counted as an affiliate member. Once a Life Member’s status has been established by way of an exchange of the PA-8A, the Life Member should be notified officially.

Life Members who affiliate with another chapter should be advised that their permanent membership will always reside in the chapter that granted them Life Membership at the time of their retirement. It is possible for Life Members to transfer their membership to another chapter of the same company from which they retired, if it is the policy of the chapters and company involved to permit such transfers, but it is not possible to transfer Life Members between chapters of different sponsoring companies.

Completed PA-8A forms are to be retained in the chapter office for a period not to exceed three years from the date of initiation.

FORM PA-8A

REQUEST OF AFFILIATE MEMBERSHIP, CHANGE OF ADDRESS OR TRANSFER REQUEST FOR LIFE MEMBERS

Date: _____ To Pioneer Administrator of _____ (Chapter Name/Number)

Mr. _____ Mrs. _____ Miss _____

Has established: Permanent _____ Temporary _____ residence at:

_____ (enter new address information on above line)

- Member wishes to: _____ Affiliate with your chapter
_____ Affiliate with our chapter
_____ Change address
_____ Transfer to your chapter (only if transferring to a chapter within home-company)

Personnel Information

_____ Please send me the following information:
_____ I am forwarding the following information:
Date joined the Pioneers _____ Date became a Life Member _____
Birth date (month/day) _____
Company retired from _____ (Name and location)
Department _____ Position held at retirement _____
Net credited service date _____ Social Security # _____
Pioneering background or interests _____

Return Notice Information

Date _____
To Pioneer Membership Person _____ (chapter name and number)
The above member was contacted and has affiliated _____ transferred _____ effective (date) _____.

_____ No record of membership, please furnish more information.

Member does not wish to: _____ Affiliate _____ Transfer

Pioneer Membership Person _____ Chapter _____ Telephone Number _____

GUIDELINES FOR ADMISSION OF NEW SPONSOR COMPANIES

The four specific procedures to assure compliance with the spirit and intent of the Association constitution and bylaws, as amended at the General Assembly in Dallas, Texas, on September 19, 1988, include:

1. Eligibility Requirement
2. Application Procedure
3. Acceptance Criteria
4. Provisional Evaluation Procedure

These four items are described below.

Eligibility Requirement

All corporations, where application for membership is made on a consolidated entry basis, for which 50 percent of total revenue is derived from the provision of switched two-way telecommunication, and subsidiaries of such corporations that are involved in provisioning, manufacturing and research, are eligible. Companies not complying with this criteria may be admitted on a special basis by the Association Executive committee at its sole discretion.

Application Procedure

Application shall be by a written request, approved by the president or chief executive officer (CEO) of the applicant, submitted to any Association region vice president.

The letter of application must include:

- Statements assuring the intent to meet the criteria for certification
- A statement of the applicant's intent to endorse Pioneer goals
- A statement guaranteeing financial support necessary for meeting the goals of Pioneering, and
- A statement assuring that membership or participation in Association activities will not be used for the purpose of conducting business.

Upon receipt of the application, the receiving region vice president shall review the application for completeness and work with the applicant to complete any necessary information.

Upon completion of this review, the region vice president shall submit the application by written letter to the Association executive director and chief operating officer with provision for "receipt acknowledged" to be returned.

Within 45 days of receipt of the letter from the Association vice president, the Association executive director and chief operating officer shall appoint a review committee and forward copies of the application to all Association officers.

The review committee shall consist of the chairpersons of each of the Association subcommittees, the region vice president who submitted the application and one Association staff member designated by the executive director and chief operating officer.

Acceptance Criteria

The committee shall have the responsibility to assure that the following certification criteria are met:

1. The potential for membership is sufficient to support the unit being certified and that the geographic location and distribution of potential membership is practical.
2. The corporation or subsidiary has and is willing to commit payroll data to provide for collection of dues by payroll deduction and for tracking membership.
3. Provisions are made for an administrator, liaison or other such officers and staff as necessary and reflecting procedures of chapters, councils or clubs comparable with the unit being certified.
4. Provisions are planned for adequate office space and equipment necessary for the unit.
5. The corporation or subsidiary is willing to meet the expected criteria for providing Life Membership status commensurate with that provided by other similar units.
6. The corporation or subsidiary is willing and has the resources to provide adequate financial backing for the chapter, expenses for officers or staffs and to meet the social obligation of the unit.
7. The corporation or subsidiary is willing and has made adequate preparation for training and leadership development.
8. The corporation or subsidiary has the necessary executive support.
9. The employee body has sufficient strength and interest to carry out the objective of Pioneering.
10. The corporation or subsidiary has provided for the proper development of chapter bylaws and for the election of a slate of officers.
11. The specified procedures for forming a new chapter are reviewed and followed.
12. The applicant's corporate officials understand that there is an ongoing period during which the unit will be expected to meet the provisional evaluation criteria and that failure to meet that criteria may result in decertification.

The committee review also shall include an on-site review by at least two committee members and the Association vice president who submitted the application. The chairperson of the committee should determine how many and who should accompany the Association vice president to the on-site review.

The on-site review shall include an interview of the CEO, the president or the vice president of human resources for the applicant.

Unless an extension is granted in writing by the Association executive director and chief operating officer, the committee shall complete all deliberations on the application within a period of 120 days.

Upon completion of its review, the committee through its chairperson should provide a recommendation to the Association executive director and chief operating officer to accept or to deny the applicant for membership in the Association and, if the applicant is recommended for membership, the recommendation should designate where the proposed unit fits into the region / chapter / council status.

The Association executive director and chief operating officer shall distribute the recommendation and an explanation of the basis for its decision to all Association officers for review. A formal vote shall be taken at the next Association Executive Committee meeting. Association officers shall be provided with this information a minimum of 15 days prior to the date of the Executive Committee meeting. The presentation of the recommendation shall be made by the chairperson of the membership subcommittee or the person's appointed delegate.

The Association region vice president representing the applicant shall notify the proper officers of the applicant as to the decision on its application for membership. Acceptance letters should outline the procedure and time frames for the next steps toward chartering the new unit. Denial letters should outline specific points where failure to meet expected criteria contributed to the denial and, if marginal, outline minor corrections or improvements that could enhance acceptance prospects.

Provisional Evaluation Procedure

Minimum evaluation will require review and a written report at 12-month intervals for the first three years of operation for the applicant. This process will be more complicated as the result of three years of operation for the applicant. This process will be more complicated as the result of the turnover of committee members during the period of evaluation. For this reason it is suggested that the Association staff member assigned to the committee play a key role in the ongoing follow-up.

Guideline Standards

Membership	30% at time of charter 40% at the end of 12 months 50% at the end of 24 months 60% at the end of 36 months
Participation	.25 hours per year per member cumulative for 1 st Pioneer calendar year .35 hours per year per member cumulative for 1 st Pioneer calendar year .45 hours per year per member cumulative for 1 st Pioneer calendar year

Projects – The chapter or other unit should have at least five specific and well-defined projects and should demonstrate sufficient fund-raising activity to support these projects.

Life Member and Partner Programs – Should be in place by the end of the second year of operation.

Financial audit – The books of the Pioneer unit shall have been audited (consistent with standard Pioneer practice) and given satisfactory approval prior to the last review at the end of 36 months.

Evidence of chapter officer and staff training should be provided.

Other criteria, as defined by the Executive Committee for specific applications.

Decertification

Decertification should only be considered when it becomes reasonably certain that the applicant is unable to attain the standards established during the certification process.

Remedial help should be considered first, particularly when the decision to decertify is borderline.

Prior to formal decertification, the corporation or subsidiary may be notified in writing by the Association executive director and chief operating officer that the unit is failing to meet provisional evaluation criteria and the notification should detail areas where criteria are not being met.

Where a remedial period is offered, it should provide up to, but not more than, one year to improve to a level satisfactory to the committee reviewing the unit. Failure to meet this requirement for satisfactory improvement will begin the process for formal decertification.

For formal decertification, the procedure should be much the same as certification. All of the Association officers should be notified in writing that decertification will be considered at a specified Executive Committee meeting.

The Association vice president of the region in which the unit is located shall present the decertification documentation at a regularly scheduled Executive Committee meeting and a formal two-thirds majority vote will be required to complete decertification. A unit may be considered for decertification more than one time during the three-year period of provisional certification.

If and when a corporation or subsidiary is decertified, the Association executive director and chief operating officer should provide written notice to the CEO or president of the applicant that the unit has been formally decertified.

A corporation or subsidiary shall have the right to request membership in the Association at a later date, but not within 12 months of the date of notification of decertification.

All reasonable efforts should be made to encourage (and where appropriate, to assist) in meeting the guideline standards and certification criteria. Only where it is the judgement of the committee that such efforts would not be successful should decertification be pursued.

Final Acceptance

When a corporation or subsidiary has met the guideline standards and certification criteria for a period of three years with no decertification, a corporation or subsidiary shall be considered a member of the Association with all the rights and privileges of membership granted to current members. No notification of this status is required.