



***2019 CALIFORNIA STATE PTA  
CONVENTION  
MAY 16-18, 2019***





# ***MEMBERSHIP BASICS***

## ***Course Learning Objectives***

- Explain why membership is so important to PTA.
- Understanding your role as a membership chairman.
- How to set goals and create a membership marketing plan.
- Recognize the diverse nature of your school community and include ways to have a representative cross section of the community into your membership plans.
- Access tools and resources to help you succeed including awards, perks and incentives.



# WHY IS MEMBERSHIP SO IMPORTANT?

- *PTA is a Membership Funded Non-Profit Organization*
- *Without our members, there is no PTA*
- *Membership + Advocacy = SUCCESS*
- *PTA Operates on both the Macro and Micro Level*







# **MEMBERSHIP BASICS**

## ***Responsibilities of the Membership Chairman***

- *Set Membership Goals*
- *Create and Implement a Membership Plan*
- *Promote Membership Throughout the Year*
- *Help Set the Membership Budget*
- *Collect Dues and Verify “Per Capita” is Remitted*
- *Create a Membership List*
- *Distribute Membership Cards*



# MEMBERSHIP BASICS

## ***Responsibilities of the Membership Chairman***

- ***Set Membership Goals***
- *Create and Implement a Membership Plan*
- *Promote Membership Throughout the Year*
- *Help Set the Membership Budget*
- *Collect Dues and Remit “Per Capita”*
- *Create a Membership List*
- *Distribute Membership Cards*

# GOAL SETTING

- **Where are you?**
- **Where do you want to go?**
- **What strategies will you use to get there?**





# GOAL SETTING

*Where are you ?*

- *Know your past membership numbers*
- *Keep track of your members*





# GOAL SETTING

## Where do you want to go?

- *Set number goals for each month*
- *Set goals for target groups*
  - *Parents and Family members*
  - *Teachers*
  - *Students*
- *Check against your goal*



# MEMBERSHIP BASICS

## ***Responsibilities of the Membership Chairman***

- *Set Membership Goals*
- ***Create and Implement a Membership Plan***
- *Promote Membership Throughout the Year*
- *Help Set the Membership Budget*
- *Collect Dues and Remit “Per Capita”*
- *Create a Membership List*
- *Distribute Membership Cards*



# PARENT MINDSET



- Parents' biggest problem is lack of time.
- Working parents often feel guilty that they don't spend enough time on their children's education.
- Parent sphere of interest is how the school is serving their child.
- Primary point of contact with the school is their child's teacher.
- Parents are concerned about their finances – current and future.
- Additionally, immigrant parents do not know what is expected of them in terms of involvement/ participation; they may feel intimidated.



# PERCEPTIONS OF PTA

- **Parents' image and perceived value of PTA is completely based on the people, programs and tangible benefits they see at their own school.**
- **Local Leaders are PTA leaders.**
- **Awareness of State/National PTA is extremely limited.**





# WHY PARENTS DON'T JOIN PTA

- Don't want to be forced to volunteer.
- Don't want to be obligated to attend meetings.
- Don't want to be asked to take on a task.





# **MOST EFFECTIVE MESSAGES**

## ***TOP THREE IDENTIFIED***

- ***Don't want to be forced to volunteer.***
  
- ***Don't want to be obligated to attend meetings.***
  
- ***Don't want to be asked to take on a task.***



# MARKET AND PROMOTE THE VALUE OF PTA

- *Add voices to the PTA advocacy voice.*
- *Understand what PTA has accomplished and continues to champion.*
- *Assess and address the reasons people don't join.*
- *Encourage current members to rejoin.*

# **YOUR MEMBERSHIP PLAN = INCLUSIVENESS**

## ***REACH OUT TO ALL AUDIENCES AND ASK THEM TO JOIN PTA***

- **Create an inviting environment for all**
- **Consider cultures, languages and religious holidays**
- **Develop and maintain respectful relationships**
- **Make sure your PTA represents your community**
- **Avoid clique-like behavior**
- **Consider who is missing – men, military, grandparents**



# SUCCESSFUL MEMBERSHIP PLANS

- Start early and use multiple touch points.
- Use teachers as key influencers and campaign drivers.
- Utilize one-on-one outreach by PTA board members and parents.
- Utilize personal outreach by bilingual board members and/or PTA parents to non-English speaking parents.
- Reach out to parents of special needs students.
- Reach out to students.
- Reach out to past PTA members.
- Include other school groups (boosters, ASB, sports teams, etc.).
- Track and reports membership progress.
- Target those who have not signed up yet.
- Publicly post progress – citing specific classrooms and even specific teachers.
- Organize events, contests, prizes and incentives.

# “THE ELEVATOR PITCH”





# “THE ELEVATOR PITCH”

Join PTA because it helps the school and it helps all the children. It allows you to be involved in your child’s education. It also keeps you informed with what is going on at the school. Without PTA, our kids would not have art, field trips, or our yearly carnival.



# MEMBERSHIP BASICS

## *Responsibilities of the Membership Chairman*

- *Set Membership Goals*
- *Create and Implement a Membership Plan*
- ***Promote Membership Throughout the Year***
- *Help Set the Membership Budget*
- *Collect Dues and Remit “Per Capita”*
- *Create a Membership List*
- *Distribute Membership Cards*

## Promoting Membership



Why PTA?





# MEMBERSHIP BASICS

## *Who can join PTA?*

Any individual who subscribes to the purposes and basic policies of PTA becomes a member upon payment of dues to a PTA or PTSA unit.

# MEMBERSHIP BASICS

## ***Responsibilities of the Membership Chairman***

- *Set Membership Goals*
- *Create and Implement a Membership Plan*
- *Promote Membership Throughout the Year*
- ***Help Set the Membership Budget***
- *Collect Dues and Remit “Per Capita”*
- *Create a Membership List*
- *Distribute Membership Cards*

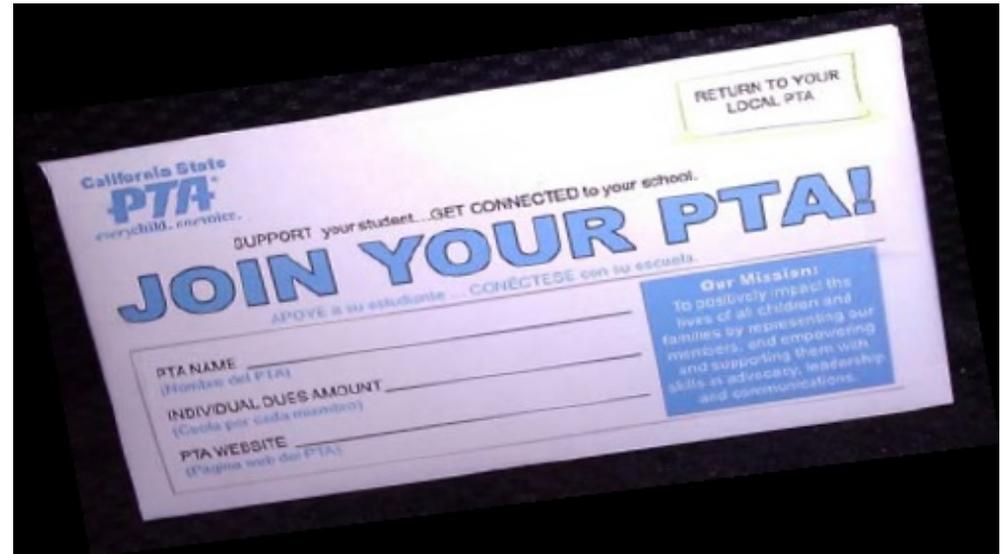
# MEMBERSHIP BASICS

## ***Responsibilities of the Membership Chairman***

- *Set Membership Goals*
- *Create and Implement a Membership Plan*
- *Promote Membership Throughout the Year*
- *Help Set the Membership Budget*
- ***Collect Dues and Remit “Per Capita”***
- *Create a Membership List*
- *Distribute Membership Cards*



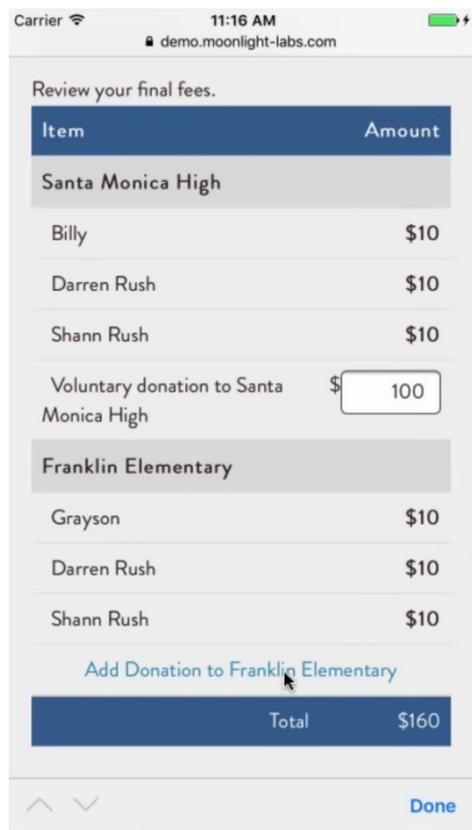
# WAYS TO JOIN



- **Have a systematic way for people to join (envelopes or other)**

# PTA ELECTRONIC MEMBERSHIP

## Multiple memberships and donations



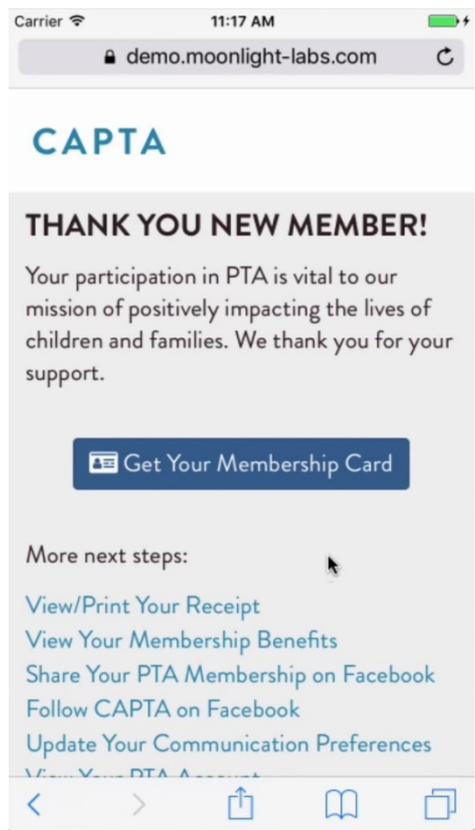
Carrier 11:16 AM demo.moonlight-labs.com

Review your final fees.

Item	Amount
<b>Santa Monica High</b>	
Billy	\$10
Darren Rush	\$10
Shann Rush	\$10
Voluntary donation to Santa Monica High	\$ 100
<b>Franklin Elementary</b>	
Grayson	\$10
Darren Rush	\$10
Shann Rush	\$10
<a href="#">Add Donation to Franklin Elementary</a>	
<b>Total</b>	<b>\$160</b>

Done

## Options for next steps, social sharing, info.



Carrier 11:17 AM demo.moonlight-labs.com

### CAPTA

#### THANK YOU NEW MEMBER!

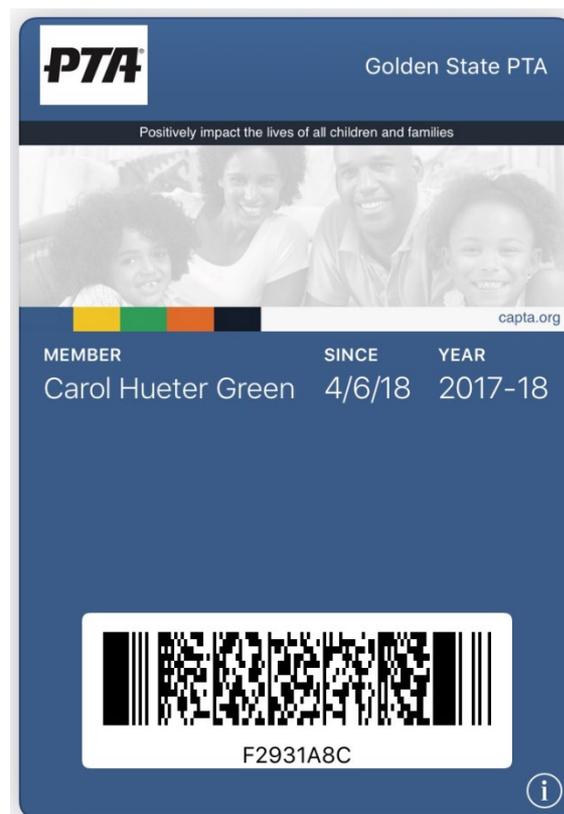
Your participation in PTA is vital to our mission of positively impacting the lives of children and families. We thank you for your support.

[Get Your Membership Card](#)

More next steps:

- [View/Print Your Receipt](#)
- [View Your Membership Benefits](#)
- [Share Your PTA Membership on Facebook](#)
- [Follow CAPTA on Facebook](#)
- [Update Your Communication Preferences](#)

## True electronic membership card



**PTA** Golden State PTA

Positively impact the lives of all children and families

capta.org

MEMBER	SINCE	YEAR
Carol Hueter Green	4/6/18	2017-18



F2931A8C

i

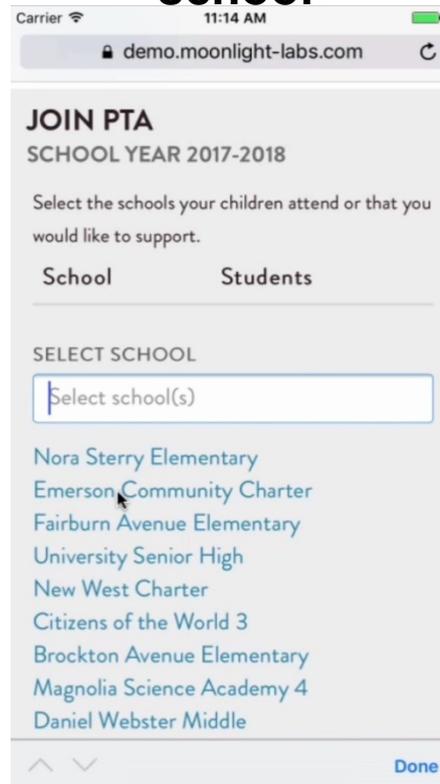
# ELECTRONIC MEMBERSHIP HIGHLIGHTS

Easy and fast login using Facebook or email



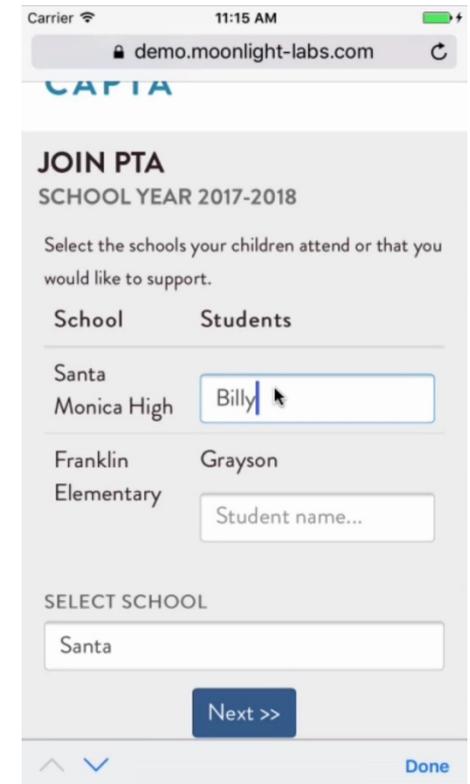
The screenshot shows a mobile browser interface for the website jointotem.com. At the top, there is a navigation bar with the CAPTA logo and the tagline "everychild.one voice." Below this is a photo of four children. A colorful bar with the text "capta.org" is visible. The main content area features the "Golden State PTA" logo and the text "Golden State PTA Sacramento, CA". Below this, the member ID "F2931A8C" and the date "Member Since 2018/04/06" are displayed. At the bottom, there is a section titled "Activities" with two items: "Download Your Membership Card" and "View Your Benefits", each with a green checkmark and an icon.

Geolocation and search to find the right school



The screenshot shows a mobile browser interface for the website demo.moonlight-labs.com. The page is titled "JOIN PTA SCHOOL YEAR 2017-2018". Below the title, there is a prompt: "Select the schools your children attend or that you would like to support." A table with two columns, "School" and "Students", is shown. Below the table, there is a "SELECT SCHOOL" section with a search input field containing "Select school(s)". A list of schools is displayed below the search field, including "Nora Sterry Elementary", "Emerson Community Charter", "Fairburn Avenue Elementary", "University Senior High", "New West Charter", "Citizens of the World 3", "Brockton Avenue Elementary", "Magnolia Science Academy 4", and "Daniel Webster Middle". At the bottom right, there is a "Done" button.

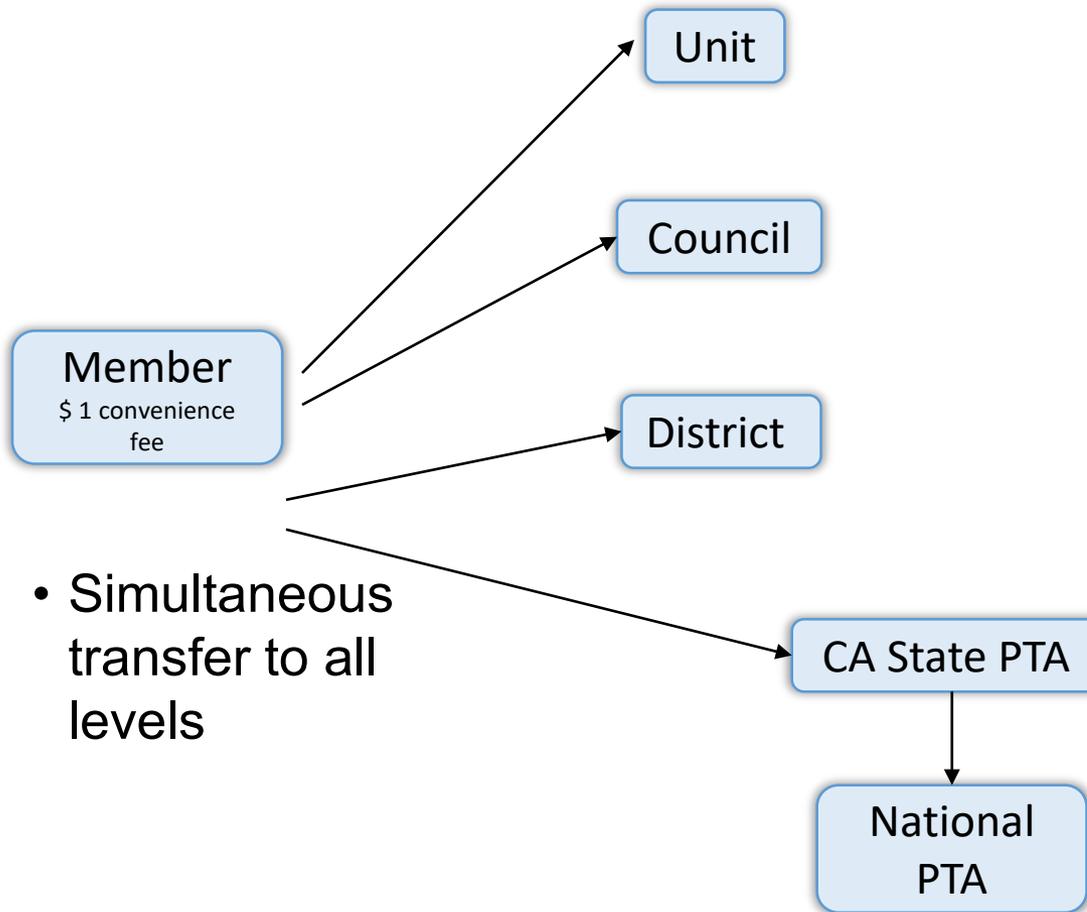
Simple forms, multiple schools all in one step



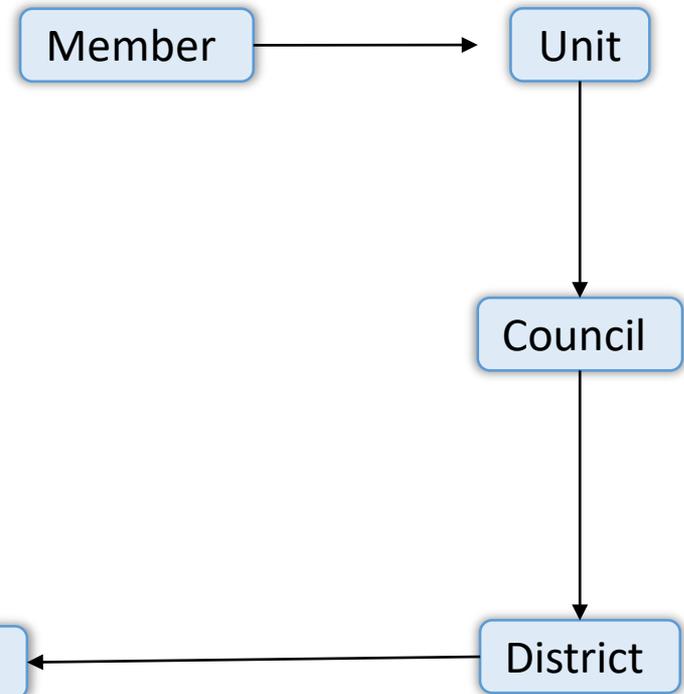
The screenshot shows a mobile browser interface for the website demo.moonlight-labs.com. The page is titled "JOIN PTA SCHOOL YEAR 2017-2018". Below the title, there is a prompt: "Select the schools your children attend or that you would like to support." A table with two columns, "School" and "Students", is shown. Below the table, there is a "SELECT SCHOOL" section with a search input field containing "Santa". A list of schools is displayed below the search field, including "Santa Monica High", "Franklin Elementary", and "Grayson". Below the list, there is a "SELECT SCHOOL" section with a search input field containing "Santa". At the bottom right, there is a "Next >>" button.

# Flow of Money

## Electronic Membership Flow



## Regular cash/check Membership Flow





# MEMBERSHIP BASICS

## *Remit Dues*



- Help keep financial records in good shape
- Maintain “good standing” status
- Forward the portion of dues to council (or district if out-of-council)
- Keep a current and accurate membership list

# MEMBERSHIP BASICS

## ***Responsibilities of the Membership Chairman***

- *Set Membership Goals*
- *Create and Implement a Membership Plan*
- *Promote Membership Throughout the Year*
- *Help Set the Membership Budget*
- *Collect Dues and Remit “Per Capita”*
- ***Create a Membership List***
- *Distribute Membership Cards*

# MEMBERSHIP BASICS

## ***Responsibilities of the Membership Chairman***

- *Set Membership Goals*
- *Create and Implement a Membership Plan*
- *Promote Membership Throughout the Year*
- *Help Set the Membership Budget*
- *Collect Dues and Remit “Per Capita”*
- *Create a Membership List*
- ***Distribute Membership Cards***



# MEMBERSHIP BASICS

## *Membership Cards:*

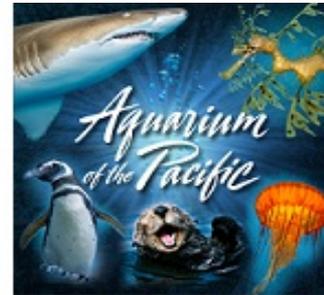
Membership cards are provided by California State PTA and distributed through PTA channels. Each member should receive an official membership card from the unit PTA upon payment of dues. The same PTA membership card is used by all PTAs.



# AWARDS, INCENTIVES & PERKS



National Contests and Incentives  
State Contests and Incentives  
District Contests  
Council Contests  
Unit Contests and Local Perks





# Idea Exchange



# MEMBERSHIP SUPPORT

Carol Green  
Vice-President, Membership Services

[cgreen@capta.org](mailto:cgreen@capta.org)

Michael Morgan  
CAPTA Membership Services Comm.  
National PTA Membership Commission

[mmorgan@capta.org](mailto:mmorgan@capta.org)

Jeff Price  
CAPTA Membership Services Comm.  
National PTA Strategic Outreach Comm.

[jprice@capta.org](mailto:jprice@capta.org)  
(562) 208-1741

Please remember that YOU ARE NOT ALONE!! We are all here to help you!!



# QUESTIONS?



**THANK YOU FOR ATTENDING!**