

# Membership Essentials

Ellen Torres  
VP Membership Service  
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[Membership@capta.org](mailto:Membership@capta.org)



[www.capta.org](http://www.capta.org)

# Overview

- **Why Membership is Important in PTA**
- **Responsibilities of the District, Council and Unit Leaders**
- **Membership Strategies**
- **Data is your friend**
- **Totem**
- **2023-2024 Membership Awards, Perks and more**
- **Resources and Tools for Success**



# ***Why Membership is Important in PTA***

- ❖ ***Advocacy***
- ❖ ***501 (C) (3) Non- Profit***
- ❖ ***Finances***
- ❖ ***Family –School Connection***



[www.capta.org](http://www.capta.org)

# Focus on Membership Goals

## Setting a Membership Goal:

- Take last year's goal and actual membership numbers into account (Membership Report)
- Look at your district or council's trend (5-Year Report)
- Determine what Membership # is realistic to use for your budget, and then...
- Add at least 10% for your new membership goal
- Dress it up and broadcast it everywhere!



# Membership Monday emails

ENHANCED BY Google



ABOUT

PTA  
LEADERS

PROGRAMS  
+ EVENTS

FOCUS  
AREAS

NEWS +  
PUBLICATIONS

RESOURCE LIBRARY

JOIN



Founders' Day | Convention | Scholarships and Grants | Legislation Conference | School Smarts | Reflect

## JOIN OUR MAILING LIST

Tell us your name, email, ZIP code and PTA district, then let us know which publications you are interested in receiving!

\* Indicates required

Email Address \*

First Name

Last Name

Zip

District Name

- I am interested in:
- ☐ Advocacy Insider
  - ☐ The Pulse (Health)
  - ☐ Leadership Essentials
  - ☐ PTA Connects
  - ☐ Creative Connection (Arts)
  - ☐ Member Perks
  - ☐ Membership Monday
  - ☐ PTA in California
  - ☐ Spanish-language publications

Subscribe

## PARTICIPATE WITH PROGRAMS AND EVENTS

While we have a whole range of programs and events, they all have a single mission at heart: to improve the lives of children and families.

| JULY 2023 |    |    |    |    |    |    |
|-----------|----|----|----|----|----|----|
| MO        | TU | WE | TH | FR | SA | SU |
| 26        | 27 | 28 | 29 | 30 | 1  | 2  |
| 3         | 4  | 5  | 6  | 7  | 8  | 9  |
| 10        | 11 | 12 | 13 | 14 | 15 | 16 |
| 17        | 18 | 19 | 20 | 21 | 22 | 23 |
| 24        | 25 | 26 | 27 | 28 | 29 | 30 |
| 31        | 1  | 2  | 3  | 4  | 5  | 6  |

# Encourage Your PTAs to “Market” PTA and Promote the “Value” of PTA

We want their voices to be added to the PTA advocacy voice.

Help them to understand what PTA has accomplished and continues to champion. Work with your board and or Historian to share what your district PTA and units have done for your school and kids.

Address the reasons people don't join. Don't be afraid to answer questions.

Reinforce the concept that joining PTA is separate from just volunteering to help at school.



# Parent Mindset

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



# Successful Membership Campaign Tactics

- 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 to parents of special needs students
- Track and reports membership progress
- Target those who have not signed up yet
- Publicly post progress – citing specific classrooms and even specific teachers
- Organize contests, prizes, and incentives





# 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.
- There is little concrete understanding of what the State PTA does or its relevance to their school.
- Awareness of National PTA can be very limited.



# Most Effective Messages – Top Three

1. “By joining PTA you are supporting valuable programs and services being delivered at your school.”
2. “By joining PTA, your dues support your school and the students and is completely separate from any other obligation to volunteer at your school.”
3. “Your membership pays for itself with tangible member benefits.”



# Primary Responsibilities of District Membership Officers

- Mentor
- Model
- Train
- Provide ideas and information
- Provide monthly membership reports at meetings



# Communicate to Your Councils and Units

- Discuss best practices with your board and council boards.
- Due dates need to be set early and easy to find.
- Awards and recognitions
- Resources
- Participate in webinars with the State Membership Team!



# Communicate to Your Councils and Units about the Proposed National PTA Dues Increase

The proposed National PTA dues increase was **defeated**. If the unit preemptively changed their bylaws to show the increase, they should go back and remove it.

If a unit is still planning on upping their dues, they must go through the full bylaws change process *before* they can charge the higher amount.



# Manage Membership Card/Envelopes

- Distribute them effectively by using last year's membership numbers
- Envelopes are ordered in the Spring/paid in the Fall.
- Encourage their use.
- Order more membership cards from CAPTA as necessary.
- Membership cards also come in Spanish.
- TOTEM digital cards



# Encourage Monthly Remittance

- Follow up with all levels
- Maintain a “good standing” status
- Only districts have access to the dues calculator system through the district treasurer
- TOTEM automatically reports online paid members, “traditional” membership must still go through channels



# Reconcile Monthly Reports

- TOTEM reports are run online through the TOTEM dashboard
- Monthly Membership Report from Cyndi Barton
- Membership Comparative Report from Cyndi Barton
- All issues must be reported to Cyndi Barton ASAP
  - Refunds are not available, if you send too much membership in, you can apply it to a different unit but not receive a refund





# Getting Set Up on TOTEM



Five Easy Steps to Launch Online Membership

<http://bit.ly/eMembershipQuickStart>

1. Invite/Activate Leaders
2. Add and Verify a Bank Account
3. Customize Membership Signup
4. Launch Online Membership
5. Promote Online Membership

A screenshot of the TOTEM payment setup interface. The left panel shows a progress bar with three steps: "Create your Totem Development account" (completed), "Create your Stripe account" (in progress), and "Ready to get paid" (pending). The right panel is titled "Set up payments for Totem Development" and contains a form for business and personal information. The form includes fields for "Business legal name" (George Washington Elementary), "Doing business as" (Acme), "Legal name" (John Doe), "Date of birth" (01/01/1984), and "Where should we send your payouts?" (Debit card). At the bottom, there is a "MEMO" section with a routing slip and an "ACCOUNT" button.

Set up payments for Totem Development

Create your Totem Development account  
Create your Stripe account  
Ready to get paid

Tell us about your business.

Business legal name George Washington Elementary  
Doing business as Acme

Share a few details about yourself so we can verify your identity.

Legal name John Doe  
Date of birth 01 / 01 / 1984

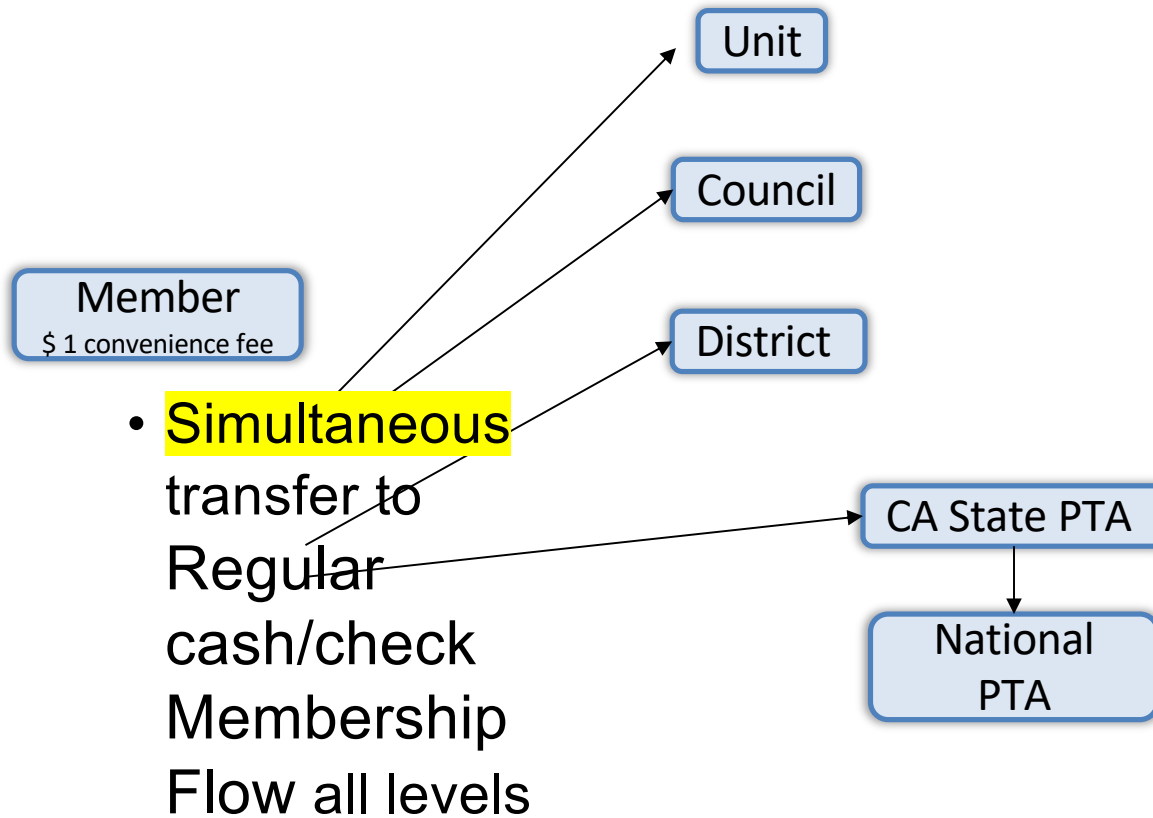
Where should we send your payouts?

Send to Debit card  
Bank account

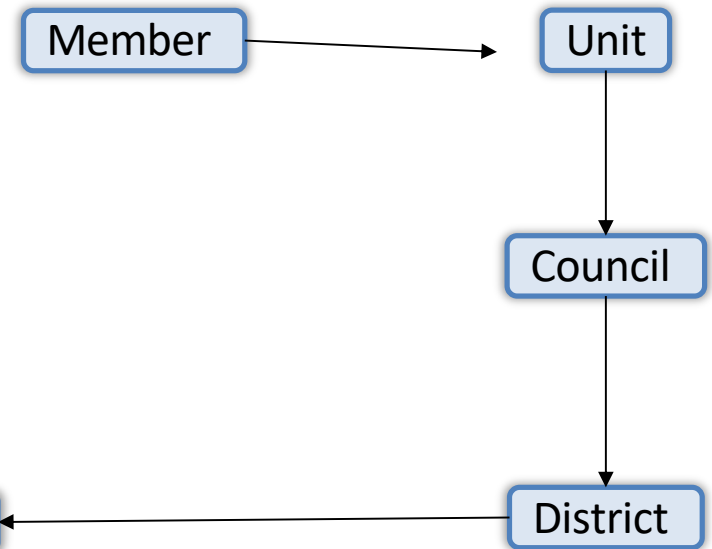
MEMO  
111000000 000123456789 1234  
ROUTING ACCOUNT

# Flow of Money

## Electronic Membership Flow



## Regular cash/check Membership Flow



# Use Monthly Membership Report Data As a Tool for your Success

- To recognize accomplishments and reward growth
- To focus district's efforts on units that need support and training
- And to keep units In Good Standing (as opposed to being NGS – Not in Good Standing)



# Community Membership Outreach

Districts and Councils can assist in membership outreach on behalf of their units to community groups:

- City, county, and state officials
- School district administrators
- Service clubs
- Chamber of Commerce
- Businesses
- Police and Sheriff departments
- Rotary groups, etc.



# Strategies for Success

Successful campaigns are the result of:

- Effective outreach efforts
- Dedicated membership person
- Consistent communication
- Membership reporting at every meeting



# Five Year Membership Reports

The Five Year Membership Report will help you to identify trends in your membership numbers.

- How did your membership respond to events within and without your control?
- What can you do to pre-emptively anticipate the change in membership interest?
- This will also help you to identify how your members feel about said events.



# AWARDS, INCENTIVES & PERKS



National Contests, Incentives & Perks  
State Contest, Incentives & Perks  
District Contests  
Council Contests  
Unit Contests and Local Perks  
Spotlight Awards



 Cheddar Up

California State PTAs get

**3 FREE  
MONTHS**

off our Pro Plan

More from State coming the  
week of August 20, 2023!

**SkyOne**  
FEDERAL CREDIT UNION



# Resources and Tools

California State PTA – [www.capta.org](http://www.capta.org)

Toolkit – <http://toolkit.capta.org/>

Membership Leaders Webpages –  
<https://leaders.capta.org/membership/>

National PTA – [www.pta.org](http://www.pta.org)

TOTEM - <https://jointotem.com/>



California State  
**PTA**  
everychild.onevoice.®





# Contacts

Vice President for Membership Services – *Member of the Board of Directors*

Ellen Torres

Email: [Membership@capta.org](mailto:Membership@capta.org)

*Provides support, answers questions, trainings, resources and materials, receives historian reports, scholarships and grants*

Membership - *Staff Positions*

Cyndi Barton

Email: [cbarton@capta.org](mailto:cbarton@capta.org)

916-440-1985 ext. 115

Donna Broussard

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

916-440-1985 ext. 118

*Provides support, monthly data reports, assistance with online dues system for treasurers, Provides envelopes, membership cards, letters of determination, and organization kits for new charters*



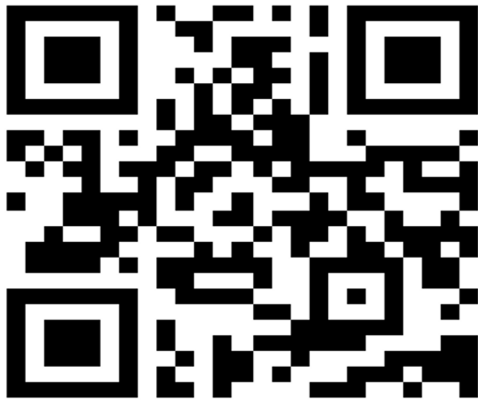


Questions?



# Thank you!

Please don't forget to ask everyone you know to join a  
PTA near you *and* join Golden State PTA



California State  
**PTA**  
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