

Membership

TABLE OF CONTENTS

Joining the PTA.....	M3
The Basics of PTA Membership.....	M3
Develop a Membership Marketing Plan.....	M3
Membership Theme.....	M3
Membership Calendar and Budget.....	M3
Implementing a Membership Marketing Plan.....	M3
Membership Envelopes.....	M4
Membership Dues.....	M4
Membership Cards.....	M4
Member Contact Information and Membership List.....	M5
Memberships.....	M5
Student Membership.....	M5
Administrators/Teachers/Staff Memberships.....	M5
Family Memberships.....	M5
Charter Memberships.....	M5
Membership Marketing Tools.....	M5
Involving Students.....	M5
Student Involvement Committee.....	M5
Students Membership Rights and Responsibilities.....	M5
Financial Procedures for Student Leaders.....	M5
Revising Bylaws to Change to a PTSA.....	M6
Outreach, Diversity and Inclusion.....	M6

Joining the PTA

California State PTA is the largest volunteer organization in the state dedicated to improving the well-being of all children and youth.

Joining PTA supports local, state and national efforts to improve the education of children and the lives of families. Membership provides the opportunity for individuals to raise their voices with others throughout the state and nation on issues affecting children, youth and families.

PTA involvement helps build leadership, communication and advocacy skills. It provides members with opportunities to participate in an educational partnership with administrators and teachers. PTA members are a valuable community resource for starting and maintaining projects to benefit children and youth.

The Basics of PTA Membership

While membership is the responsibility of the entire PTA board, each PTA should have a designated membership leader. Membership chairmen are appointed; membership vice presidents are elected. For details on the responsibilities of the Membership chairman/vice president at a unit PTA, see “*Job Description for Membership Chairman/Vice President*” in the PTA Toolkit.

The membership chairman/vice president works with a membership committee and serves as chairman. The membership committee consists of members appointed by the president, or the president-elect if the committee is formed before the school year begins. Committee members should include teachers and students, if appropriate, and should represent your school population. Under the direction of the membership chairman/vice president, the membership committee:

- sets membership goals,
- designs a membership marketing plan with outreach promotions,
- calendars events and activities throughout the school year,
- submits a budget to support the membership program,
- implements and evaluates the final plan.

The membership plan must be approved by the executive board.

Develop a Membership Marketing Plan

Set membership goals.

Plan a membership promotion campaign that uses a variety of methods and outreach activities to promote the value of PTA membership. Go to the California State PTA website, capta.org/sections/membership/value-pta-membership.cfm and the National PTA

website, www.pta.org, for membership campaign ideas, resources and current membership incentives and award programs.

Your membership plan should include a theme, if appropriate, a membership calendar and a membership budget.

Membership Theme

Create a membership theme for your membership campaign, if appropriate. Choosing just the right theme for your PTA can make a big difference in your membership growth for the year. The membership committee, the membership chairman/vice president and the president should work together to develop the membership theme.

For theme ideas, go to <http://capta.org/pta-leaders/run-your-pta/building-membership/ways-to-increase-pta-membership/membership-theme-ideas/>

- PTAs may select the current California State PTA or National PTA theme.
- The school mascot or a community symbol can serve as inspiration.
- The theme should appeal to everyone your PTA is trying to reach.
- Consider using theme-related incentives and rewards to promote membership growth.

Membership Calendar and Budget

Membership promotion is year round and should include a membership kick-off and a mid-year membership push. Work with the president and the principal to calendar membership events and promotions. Include due dates set by council and district PTAs for membership dues remittances, and for awards and incentives. PTA/PTSA's using the electronic membership system that remits directly to other PTA levels do not remit per capita dues for those members.

California's membership year begins on July 1 and ends on June 30.

Prepare a membership budget to submit to your executive board. Include a list of expenses for membership promotions, incentives, and events for the entire year. If your PTA uses California State PTA membership envelopes, the budget should also include the cost of envelopes purchased.

Implementing a Membership Marketing Plan

It is the responsibility of the membership chairman/vice president and the membership committee to implement your membership marketing plan. Responsibilities should be shared by membership committee members. Duties could include:

- preparing invitation letters or the [Customizable Membership Marketing Tool Instructions](#) flier and envelopes for first day packets or school registrations;

- writing/preparing an invitation to join with the e-membership link;
- preparing invitations to join for teachers, staff and administrators;
- sharing responsibilities at membership kick-off or promotional events;
- preparing promotional fliers, banners, posters, social media postings, etc.;
- Sending invitation to join with e-membership link to all past members.
- Asking the school site administrator to send invitation to join PTA (including e-membership link) to the all family/guardian list
- tracking membership progress for incentive rewards;
- staffing a membership promotion booth or table at school or community events;
- writing/preparing special invitations to community leaders, local business leaders, elected officials, community members, after school program providers, past PTA leaders, past Honorary Service Award recipients, retired teachers, administrators or staff members. Invite everyone to join PTA!
- creating welcome packets for new arrivals at your school.
- Preparing/printing "Join PTA" signs that include the QR code for e-membership
- Create a bulletin board highlighting PTA/PTSA activities and include a join link/QR code
- Developing a plan/calendar to staff membership tables at PTA events
- Developing a plan/calendar to talk to key school and community groups

Membership Envelopes

Membership envelopes are available for purchase from your council or district PTA for a nominal fee. They can be used to encourage membership participation. Envelopes can be included in welcome or registration packets and can be used to collect relevant information about members. Two board members need to be present when the membership envelopes are opened. Proper PTA financial procedures should always be followed.

Membership Dues

Membership is effective as soon as dues are paid although certain rights may not activate until thirty days after dues are paid, such as the right to make motions, debate, hold an elected office, and vote. A portion of the membership dues collected stays in your unit. Membership campaigns are not to be considered fundraisers. Dues should be kept affordable so that everyone can join.

A portion of the membership dues collected stays in your unit, and a portion of the membership dues (known as

per capita) is sent through channels to the council, district, state and National PTA. These pass-through monies are used to support those levels of PTA which, in return, support the unit with leadership, training, advocacy and other needed services. The e-membership system automatically remits the appropriate per capita dues to all PTA levels for memberships purchased through the system.

Membership dues may differ in amount in each PTA and are listed in the local unit PTA bylaws. Dues amounts can only be changed by updating the unit bylaws and submitting them through channels for approval by the California State PTA parliamentarian. A unit-initiated dues increase will not go into effect until the association's bylaws have been updated and adopted by the membership.

The dues portion not belonging to the unit (per capita) must be forwarded through channels at least monthly. Once dues have been forwarded through channels, dues cannot be refunded to an individual member. To remain in good standing, a unit must remit per capita membership and insurance premiums. The district PTA will be notified if a unit is "not in good standing" by the California State PTA office by December 15 if dues for at least 15 memberships have not been received. If dues are not received by March 31, the unit is delinquent and the unit's charter shall be withdrawn by vote of the California State PTA Board of Managers at its April/May meeting.

Donations can be solicited, but must be kept separate from membership dues in all financial records and reports.

Members join at the unit PTA. As unit PTA members, they are also members of their council, district, California State PTA and National PTA, and are represented at these levels of PTA.

Membership Cards

Membership cards are provided by California State PTA and distributed through PTA channels (units receive them from their council, if in council or their district PTAs). Each member should receive an official membership card from the unit PTA upon payment of dues. Members who join using the electronic membership system authorized by the California State PTA will receive electronic membership cards upon joining, so the unit will not need to provide them with paper membership cards.

Membership information is filled in on the card before the membership card is distributed. The National PTA unit number is used as the Unit ID number on the membership card. Membership information can be printed on the card using a computer printer; a membership card template is available at capta.org. Information can also be printed by hand or stamped onto the membership cards. Electronic membership cards are now available from district PTAs. These electronic cards which contain the unit's ID number and member's name, may be saved on the members' Smart phone or tablet, and serve as proof of membership.

The California State PTA membership year is July 1 to June 30. **Membership cards in California expire on October 31, allowing a grace period (from July 1 to**

October 31) for our members to renew their membership. During this grace period, members are entitled to their full membership rights, including approval of the PTA budget and program at the summer or fall association meetings.

As each PTA is a separate and individual association, members having children in more than one school may pay dues to support the PTA in each child's school.

Member Contact Information and Membership List

A membership list must be created and maintained by the membership chairman/vice president. A regularly updated copy should be provided to the secretary and the president. The list should include member name, contact information and the date the member joined. Membership lists can be hand-written, or kept using computer software or programs such as PTA EZ™. Lists should be kept confidential within the PTA organization. PTA recommends that membership lists be kept for 3 years in the event of an audit by the Internal Revenue Service.

Memberships

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. The rule of thumb is one dues payment=one card=one association vote.

Student Membership

Student membership is a vital part of the association. Membership is open to students of all ages. Please see capta.org/join/student-membership/ for additional information.

If a PTA unit chooses to include a different membership dues structure for students, the bylaws must reflect this structure. The student membership dues must be at least equal to the portion of dues which is forwarded to council, district, state and National PTA.

Administrators/Teacher/Staff Memberships

Administrators, teachers and staff members are valuable members of the association. They should be invited and encouraged to join and participate. A PTA unit can choose to include a teacher/staff membership dues structure. If they do bylaws must reflect that dues structure, and it must be at least equal to the portion of dues which is forwarded to council, district, state and National PTA.

Family Memberships

If a PTA unit chooses to include a family membership dues structure, the bylaws must reflect this structure. The number of members per family must be specified, and the dues paid per member should be at least equal to the portion of dues forwarded to council, district, state and National PTA. Please consult with your district parliamentarian for specific language regarding family memberships.

Charter Memberships

Charter members of a PTA are those who pay dues at the organizational meeting of a new PTA. Charter members at an organizational meeting held between April 1 and June 30 are considered members for the following year and are entitled to a new membership card without payment of dues. For more information about Charter Memberships, please contact your local PTA district.

Membership Marketing Tools

The California PTA website, capta.org, contains membership resources and promotion tools. Also on our website is a current list of membership award and incentive programs, and current membership benefits.

Involving Students

Student involvement is the active inclusion and effective participation of students of all ages in the work of the PTA/PTSA association. California State PTA encourages and promotes full student participation in PTA/PTSA leadership, planning, events, and programs.

Student Involvement Committee

The formation of a student involvement committee with student and adult members generates and sustains the active participation of student members. The work of the committee includes:

- Surveying students and the school community to determine what type of activities would encourage more student involvement, and to determine student needs and concerns.
- Developing a plan and calendar based on survey results for activities, events and programs that meet students' needs and foster more student involvement.
- Allowing students to have an active voice by seeking input and feedback from all students.
- Partnering with school clubs, PTAs or community organizations to co-sponsor events, programs or activities of interest and relevance to students.

Students Membership Rights and Responsibilities

Students, upon payment of full membership dues, have all membership privileges and responsibilities. A student may serve in any PTA/PTSA office. All officers, adults and students alike, must perform duties of the office as outlined in the bylaws.

Financial Procedures for Student Leaders

- **Checking Accounts** – Students may be signatories on the PTA/PTSA account as long as they have been approved as one of the signatures by the association and it has been noted in the minutes of the association.
- **Contracts or Binding Procedures** – All contracts or binding commitments of the association must always be approved and voted on by the association in accordance with PTA policy. If a student under the age of 18 is a signer, the other signer must be an adult. (see Contracts, Finance Chapter)

Revising Bylaws to Change to a PTSA

- **Bylaws** – When the bylaws are changed making the unit a PTSA, provision should be made for at least one position on the executive board to be filled by a student.
- **Dues Structure** – If a PTA/PTSA plans to have a separate dues structure for students, the dues amount must include the per capita amounts required to be sent through channels to the council, if in council, district PTA, California State PTA and National PTA.
- **Nominating Procedures** – For PTSAs, at least one student should serve as a member of the nominating committee elected at an association meeting. When considering a person for any office, it is always best to make sure the person understands all of the duties of the position.

your community. Members come with their own views, experiences, cultural heritage and traditions, skills and abilities, values and preferences. California's public schools are a rich weave of these diverse threads, and their PTAs must be as well. Discrimination or prejudice, even behind closed doors, cannot be tolerated.

To be inclusive:

- Recognize that involvement of diverse populations enriches PTA activities and enhances the wellbeing of all children and youth.
- Listen to all voices so that your PTA can be an effective voice for ALL children.
- Celebrate diversity. Break down barriers that discourage people or minimize their involvement.
- Include in your active membership a representation of all ethnic, cultural, religious, economic and social groups in the community.
- Ask: Are there large underrepresented groups of California's population missing from your PTA's active membership? Is there enough representation from all groups to give an understanding needed to be advocates for all children? Does your PTA seek a diverse membership?

Outreach, Diversity and Inclusion

Outreach is a commitment to create an inviting climate, to form respectful relationships and to share important information about PTA with all community members. Outreach includes efforts that focus on enlisting the participation of all parents, students, and community members in the educational process, and establishing collaborative relationships focused on positive impacts by:

- Using languages represented within your community at your meetings and in your communications.
- Working to build representative leadership and voice within your PTA of all community groups. The makeup of your board members should reflect the makeup of your school community.
- Understanding that everyone has value.
- Assessing your outreach success regularly. Are there new board members and new members at your meetings that represent all parts of your community?
- Including students, teachers, community and extended family members.

Inclusion is a commitment to involve the entire school community in planning, as well as enjoying, PTA programs and activities. Bringing in many different views is the key to building a robust and meaningful PTA in

PLEASE REMOVE THIS PAGE

AND REPLACE WITH

PROGRAMS TAB

PLEASE REMOVE THIS PAGE

AND REPLACE WITH

PROGRAMS TAB