



## Membership—A Few Basics for 2016-17

Presented by Susannah Baxendale, Director of Membership

- **Membership is not a fundraiser.** Your dues should be enough to cover the costs of running a membership campaign (including mailing cards to members as needed) and some of your PTA's program costs, but you don't want to make dues prohibitively expensive to join.
- **Not all the dues you collect belong to your unit.** When people join PTA, they join at every level from unit right through to National PTA. The membership dues paid include dues for council, State PTA and National PTA, as well as for your unit. That means you can't keep the money not belonging to your unit. The unit treasurer must remit faithfully upwards **EACH AND EVERY MONTH**, even if it is for just one person's dues. Similarly, councils must remit to district **EACH AND EVERY MONTH**.
- **Remitting dues upwards is a critical part of being a unit in good standing.** For example, your school's students can't participate in the National PTA Reflections program unless your unit is in good standing (dues and insurance paid). Your unit also runs the risk of being disbanded or having its charter pulled if dues are not paid. Don't take the risk!
- **All members of your PTA should receive a membership card—no ifs, ands or buts!!** You can be economical in how you distribute cards but ultimately you will have to mail some cards and you should factor that into your budget.
- **Why do people need to join more than one PTA?** Voting privileges are tied to the unit. If you want the right to decide on programs and spending in a particular PTA, you must join that PTA. That is why you should join the PTA of each school your children are in.
- **ALL OFFICERS AND CHAIRMEN MUST BE PTA MEMBERS—THEY SHOULD BE THE FIRST TO JOIN EACH YEAR!**
- **NO UNIT SHALL BE REQUIRED TO GET MEMBERSHIPS AND REMIT BEFORE RECEIVING MEMBERSHIP CARDS FROM COUNCIL.**



**Membership—Unit Month-to-Month for 2016-17**  
**Presented by Susannah Baxendale, Director of Membership**

## **June-July**

- Form your Membership team: consult with your president-elect concerning committee members.
- Review the procedure book handed over from your predecessor. No procedure book? Make one so that your successor is happy!
- Prepare your budget and review with your president and treasurer. Consult Membership ABCs on what your budget might require. Also ask about the State PTA convention budget—Convention 2017 will be in San Jose and your unit needs to budget for several people to attend.
- Pick up membership envelopes from your council if your unit uses them or review and update the flyer that your unit uses.
- Check with the parliamentarian that the dues you are asking for are those in the current bylaws.
- Pick a theme for the membership campaign.
- Set a goal—be ambitious!
- Make sure that all elected officers and chairmen are members of your unit.
- Determine how you will be distributing membership cards to all members: When they join in person? At meetings? By mail? Sent home in backpacks? Be prepared in advance.
- Review the District Membership Contest rules to see how you can earn points.
- Consult with your unit's financial team—Membership produces a lot of income and you want to follow all procedures to the letter. The president and treasurer should be aware of council's deadlines for remitting dues upwards and those deadlines will affect your bragging rights.

## **August**

- Review the awards that State PTA offers (see handout); pay attention to pertinent deadlines.
- Ask your council membership leader about efforts to recruit community members as members of some or all of your council's PTAs.
- Do you need a special flyer to bring in teachers as members?
- Prepare for the start of school membership drive; recruit helpers if your committee is small.
- Determine how to keep your membership records. You can do it most easily in EXCEL (or its equivalent) but remember, lists used to be kept by hand so don't worry if you aren't a computer whiz.
- Once your membership drive starts, be sure to generate lists for the recording secretary, president and your own notebook. These lists are proof of membership even for those who haven't yet received their cards.
- Ask your communications leader for opportunities to include membership materials in newsletters and e-blasts.

## September

- Make a monthly report to the executive board. Be enthusiastic and ask for feedback and advice.
- Prepare for the first association meeting. The first association meeting is a great time to recruit members. So have plenty of prepared cards (all but the name of the person joining can be filled in) and a cashbox. Be sure that you are on the agenda to speak to the importance of joining PTA.
- At every association meeting, be there to welcome everyone, especially those unfamiliar to you. Tell them how glad you are that they are participating in PTA and contributing to the well-being of all students, then ask them to join PTA!
- Plan on attending the district's Fall Association Meeting and Officers Training in October. Now that you are in the thick of things, you'll have questions to ask and advice to give. Points to those who attend!
- **First Award deadline is coming up!!** "Ready, Set...Remit" requires 30 or more members by the district October deadline; your deadline to council will be much earlier. So what does this mean for you at the unit level? **Your September remit is critical!! And if need be, your treasurer should do a special remit to meet your council's deadline. WHY? Because "Ready, Set, Remit" is required for units applying for a Spotlight Award. Spotlight Awards have 6 categories including membership; don't let your unit miss out on applying.**
- Don't just focus on teacher memberships. Your school's administrators and classified employees should join your PTA to boost your numbers and your support.
- Look for emails from your council membership counterpart—some will be about ways to get contest points, others will include important council deadlines.

## October

- Evaluate your membership campaign: are you using all means to reach parents, teachers and community members?
- Attend the district's Fall Association Meeting and Officers Training.
- Make a monthly report to the Executive Board and to your association if it meets this month. Communicate your goal and your progress. Be sure to thank your committee.
- **If you missed the "Ready, Set Remit" deadline, be sure your unit does not miss the mid-November deadline to remain in good standing (at least 15 members). Check with your treasurer to be sure this deadline will be met.**

## November-December

- Start thinking about Phase II of your membership campaign—membership is a year-round endeavor. Think about a Valentine's based push (Love your PTA) for example. If State PTA has announced a particular themed membership challenge (often to do with recruiting men), then use that as a special membership push.
- Keep working on getting your teacher membership up to 100%. The District Contest rewards units with 100% teacher membership. Their membership benefits PTA in general, their interests as teachers in particular and your unit as well.
- Assuming State PTA authorizes the Teachers Matter Award, you will need at least one member over last year's total membership numbers as well as getting 100% of your teachers to join your PTA in order to submit an application.
- Don't forget those monthly reports and reminders to the treasurer to remit!
- Look at the Spotlight Awards for Membership and apply: you should be proud of what you do.

## **January-February**

- **Pay attention to deadlines for awards.**
- Implement Phase II of your membership drive—maybe take advantage of district or State PTA challenges for extra pizzazz.
- Attend the Thirty-Third District PTA Annual Meeting. In addition to the election this year, the "Ready, Set...Remit" Awards are often handed out at this second of three district association meetings.
- Don't forget those monthly reports and reminders to the treasurer to remit!

## **March**

- Pay attention to emails from your council about the District Membership Contest. The points are tallied in time for the Spring district association meeting in April. The unit with the most points is honored as well as the council with the most points.
- Don't forget those monthly reports and reminders to the treasurer to remit!

## **April-May**

- Be sure that you and/or your successor attends California State PTA Convention and go to those Membership workshops! This year Convention is in San Jose.
- Attend the Spring district association meeting this month: membership awards are among those handed out at this third of three district association meetings and are written up in the printed program.
- Don't forget those monthly reports and reminders to the treasurer to remit!
- Sign up for you and/or your successor to attend the Thirty-Third District PTA Spring Officers Training in early June.
- 

## **June**

- Update your procedure books and turn them over to your successor. Be sure to include any comments you have on what worked and what didn't. Your successor will thank you.
- Be sure you and/or your successor attend the Thirty-Third District PTA Spring Officers Training.



## **MEMBERSHIP ABCs for 2016-17**

Presented by Susannah Baxendale, Director of Membership

So you are the Membership chair or VP for your unit! What does it mean?

- You consult with the outgoing Membership person and your new president, you look at the procedure book you've inherited, you check with the treasurer about your budget.
- You will set a theme and goal for your membership campaign.
- You will run a membership campaign to bring in returning and new members to your PTA. This will involve getting students and teachers excited about PTA membership, it will involve making membership meaningful so people want to join and easy to do so that they actually do join.
- You will keep membership lists and make sure that you always have the current lists with you at PTA meetings and that the recording secretary and president have copies of the lists as well.
- You will remit money regularly to the financial secretary or treasurer (depending upon your unit's bylaws). You will politely keep tabs on the treasurer to make sure that membership dues are being remitted to council on schedule every month.
- You will report monthly to the Executive Board and at every association meeting—make your report interesting and enthusiastic.
- You will keep your membership campaign fresh—membership runs all year long, not just at the beginning of the school year.
- You will apply for State PTA membership awards and help your unit and council participate in the District Membership Contest as well.
- You will recruit helpers—you might have a committee or simply a small group of PTA friends who will help when you need it such as at registration, to assemble membership packets to go home in elementary school backpacks, or help at a registration table at back to school nights, open house, concerts and any other time your school or PTA has an event where you might recruit new members.
- You will contact your council membership person if you have questions, problems or need more supplies such as cards or envelopes. PTA communication works through channels. Council will receive information and reminders from district and California State PTA and pass it down to you at the unit. Council will also communicate with you about council requests and deadlines. If you don't hear regularly from your council membership person, get in touch and find out why.

**Budget & expenses:** What kind of expenses might you have? Postage to mail membership cards, PTA membership envelopes (purchased from district through council) or printing of membership flyers, printing of promotional material for your membership table, posters for classroom contests, small incentives or prizes for classroom contests. Look at the prior budget and see if there are places you could cut down on expenses; membership is important but it shouldn't be a high-budget project!

**Member Perks:** Promote the Member Perks offered by National PTA and California State PTA (a flyer is available on the CAPTA website) as another incentive to joining PTA. Remind your members to create a "[PTA Profile](#)" to gain access to national membership resources and year-round savings from PTA member benefit providers. Your unit may have its own perks to offer and you should promote those as well (for example, a reduced entrance fee to an event for members).

### **Membership Cards: Traditional**

What you print on the membership card: You can pre-print the unit ID number and the school name. The member's name and signature must be added by hand if you are handing out cards as people join. If you are preparing cards from a list of people who joined and are getting cards later, you can print unit ID number, school name and the member's name. The member would then sign. **You must include the unit ID number to ensure that the member can use the card to prove membership.**

How to print your hardcopy membership cards: The number of cards per sheet varies from year to year; a template is developed and sent out from State PTA through channels down to the units. The template should work with your printer, but do a test run on a blank piece of paper, then hold it up to the light with the membership card sheet to be sure everything lines up. Adjust if it doesn't. If you aren't good at this sort of thing, ask a friend to help.

How many cards to print: DO NOT PRINT ALL OF YOUR CARDS IMMEDIATELY. Your council might need to borrow some blanks to help another unit with a very vigorous membership campaign.

When to hand out the cards: As much as possible, hand the cards out when the member joins. This saves time and postage, and makes the member feel a part of PTA immediately! If you don't have the cards initially, then you will be distributing the cards at the first association meeting, or mailing them to the members. If your unit doesn't have many association meetings, then you are going to have to mail the membership cards you couldn't distribute when the member joined.

How to get more cards: In a nutshell: units ask council for more cards, then council asks district. Usually the council president has one to two opportunities a month to pick up cards without making a special trip. Ask for the schedule and time your requests as a courtesy to all. Extra cards are distributed only if there have been sufficient remits.

Initial card distribution: District PTA gives councils the number of cards equal to the end of year total for that council from the prior year. If the end of year total for 2015-16 was 6575, then that is the number that council would receive to distribute for 2016-17. In turn, councils distribute cards to the units based on each unit's end of year total. Often a council will not give the unit 100% of the cards to start with. Why? Some units have a very vigorous membership push early on and run out of cards. If council did not retain some blank cards, there would be no cards to distribute. A council may not request more cards from district PTA until membership dues have been remitted by council to district. Wise councils do not give out more membership cards to a unit until membership dues have been remitted. Councils must give units a reasonable number (at least 80%) of membership cards at the very start of the new year; units must never be asked to pay up front for membership cards. But councils are not obligated to hand out more cards to any unit which is not remitting in a timely fashion.

### **Membership Cards:** Electronic

As of May 2016, the CAPTA website still has the same information about electronic membership cards: **"Digital membership card option:** California State PTA is now offering the option to distribute digital membership cards to your members instead of paper cards. For the 2015-16 membership year, units can either distribute the paper membership cards, the new "e-cards" or a combination of the two. PTA unit leaders can customize and distribute e-cards to their members by email. Members can then save the image of their personalized e-card to their smartphone or tablet device and carry it with them, just as they would a traditional paper card. The digital cards do not need to be printed." **Many units are using a combination of paper and digital membership cards. A combination is advised because not everyone has a smart phone and you must be able to provide each member with a card in the form that he or she can use.**

**Membership Committee:** Ask your unit president to appoint a committee to help you. Brainstorm ideas for classroom contests, think about logistics of collecting envelopes, talk to the principal and then the teachers to be sure it is ok to run a contest which might require the teachers to help you. Be aware of any and all events at which you might want to have a membership table; be sure to line up volunteers to help you so you don't get exhausted and burnt out! Always think about who will be there with you to count the membership money so that you can do the income verification form properly and ensure that you are following all PTA requirements for handling money.

**Membership Envelopes:** Each spring, usually in April, councils place an order for membership envelopes from State PTA; the units have told them what they think they'll need. You get the envelopes during the summer along with any vouchers/incentives that have been given to district PTA to hand out. Some units run out of membership envelopes and want more. You can ask your council if they have any and if they don't, council will ask district PTA. An alternative is to print up a flyer to use for the rest of the year. It can be stapled to an envelope with the PTA address on it, but that isn't necessary.

**Membership Reports:** Each month you will report at the Executive Board meeting and you will report at each association meeting as well. Be enthusiastic; share your theme and goal; assess your progress in terms of numbers; make sure everyone at the meeting is a member.

**Remitting membership dues to council:** **At least once a month, if not more often,** your treasurer should be remitting to council all membership dues received since the last remit to council. Remits may be mailed to council, but most often, unit presidents bring the check and paperwork to the monthly council meeting. Logistical issues arise because two people must sign the check submitted and prior to that, the treasurer must have received the membership money and income verification form from membership! Work with your financial team and president to figure out the very best procedure to ensure that your unit is remitting **at least once a month, if not more often, to council by council's deadline.** Council must adhere to district PTA's financial deadline and likewise district PTA must adhere to California State PTA's financial deadline.

Let us be blunt: If your unit is not remitting all new membership dues to council at least once a month, **it is stealing** because that money does not belong to the unit. If your council does not remit to district PTA the membership money that its units are remitting faithfully, **it is stealing.**

**Theme and goal:** Your theme can play off your president's theme or the California State PTA theme or Thirty-Third District PTA's theme or your theme can be something completely different! Your goal should be a percentage increase of last year's end of year number or it can be a raw number increase. Balance optimism with realism. If you know that your unit discourages easily, set a modestly optimistic goal. If your unit is gung-ho, then set a big goal.