



MEMBERSHIP

HANDBOOK

Abstract

This handbook is intended to serve as a guide for local PTA and council membership chairs.

Audience

Local PTA and council membership chairs, vice presidents, and presidents

Washington State PTA

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1. Introduction

PTA is a grassroots association working exclusively to improve the education and well-being of all children and youth at home, school, and in the community. Washington State PTA (WSPTA) membership is as diverse as Washington State is in culture, education level, and parenting style. By joining a PTA, a member automatically becomes part of the largest child-advocacy association in the state—132,000 strong across Washington.

PTA is a membership-driven association. People join PTA to show support for the work PTA does locally to benefit their child and community, and also to support the work PTA does collectively to help children, families and schools.

Every individual who joins PTA helps not only her or his own child, but every child. Imagine how strong a community could be if every parent, every teacher, staff member and administrator of a local school, and every community member and business leader got involved in PTA!

2. Duties of a nonprofit board member

Some, but not all, membership chairs are also members of their PTA's board of directors. The local PTA's standing rules will state whether the person in charge of membership at that local PTA is a member of the board of directors, and may assign a specific title for the membership position. For the purposes of this handbook, all persons in charge of membership at a local PTA will be referred to as "membership chair" regardless of whether this person serves on the board of directors or has a different title. If a membership chair does serve on the board of directors, however, there are important legal duties to be aware of.

Each elected member of a nonprofit board has three legal duties, collectively known as their "fiduciary" duty. A fiduciary is a person who holds something in trust for another. A PTA board is charged with holding the well-being of the PTA in trust for its members. The three legal duties are:

- **Duty of Care:** to pay attention to the organization's activities and operations;
- **Duty of Loyalty:** to put the interests of the organization before personal and professional interests;
- **Duty of Obedience:** to comply with applicable federal, state, and local laws; adhere to the organization's bylaws; and remain the guardians of the mission.

There are two WSPTA resources that directly address these legal requirements: PTA and the Law and *Money Matters*. PTA and the Law is a class that is offered yearly across Washington State. It has accompanying resources that are available only through that class. One elected officer from every local PTA must take PTA and the Law yearly, in accordance with the WSPTA standards of affiliation. *Money*

Matters is a handbook available on the WSPTA website under PTA Leader Resources. It is also a class that is commonly offered at region and/or council training. *Money Matters* deals specifically with the financial responsibilities of the board of directors.

3. Duties and responsibilities of the membership chair

There is substantial support available to local PTA membership chairs. In local PTAs that are served by a council, a council board member will be available to support the needs of local PTA membership chairs. In each region, there is also a membership chair who is part of the state membership committee led by the WSPTA membership director. This region membership chair is available to assist local PTA membership chairs as well. Please reach out, ask questions, and share ideas.

The duties of the membership chair include:

- Recruit a membership committee that reflects a diverse population. Include fathers, single parents, staff members, community members, and people from different ethnic backgrounds.
- Work with the committee to set a yearly membership goal.
- Plan membership campaigns.
- Prepare campaign materials.
- Work with the committee to make the work of PTA visible to the community.
- Plan and execute efforts to “brand” PTA activities and events.
- Arrange and advertise any membership benefits.
- Lead membership recruitment efforts.
- Collect and process dues appropriately.
- Enroll members using the WSPTA web-based membership system.
- Work with the treasurer to send dues and remittance forms to WSPTA on a monthly basis.
- Continue to work on membership goals and campaigns all year.
- Check membership rosters frequently for duplicate entries.
- Maintain accurate membership records.
- Transition with the incoming membership chair.

4. What does Washington State PTA do, and where do membership dues go?

- Representation
 - WSPTA is a voice for children and families on more than 30 state commissions and committees. See the *Washington State PTA Annual Report* (available on the WSPTA website) for more information.
- Parent education

- Provide networking opportunities with other parents and PTAs.
- Resource materials available through WSPTA and National PTA.
- Classes offered on parenting issues at WSPTA convention.
- Informed and trained leadership
 - WSPTA offers numerous leadership training opportunities and publications.
 - National PTA offers e-learning, publications, and many other resources for leader development.
- Support
 - Region directors and service delivery teams offer direct support.
 - WSPTA staff offers direct support.
- Technical services
 - WSPTA staff help with charitable solicitations registration, incorporation annual report, and 990/990-EZ/990-N IRS forms.
 - WSPTA staff help with membership database.
- Programs
 - Ideas and resources for effective local programs.
 - National PTA Reflections arts recognition program.
 - Men’s essay contest, School of Excellence, and many more.
- PTAs in Washington State are eligible for special low rates for liability, fidelity bonding, officer liability, and property insurance.
- Advocacy training
 - Learn to advocate for children through classes, legislative assembly, region and state conferences, and publications.
 - WSPTA’s advocacy consultant is available to support advocates with public policy and legislation.
- Publications, such as the quarterly Member Connection and the weekly Leadership News.
- **Local PTAs share brand and name recognition as part of a state and national association with a history as a powerful group speaking on behalf of all children and youth for over 105 years.**

5. Types of membership

PTA is an individual member association, which means Washington State PTA is an association of individuals who voluntarily join to support the work of the PTA. Each individual member has rights within the organization and a voice in PTA activities. Some PTAs have explored innovative membership levels to increase membership, including “family” membership. To avoid confusion about how many “members” are in the “family,” we recommend different wording, such as “two-person memberships.” No matter how a PTA chooses to package membership options, however, the following must always be true: **one individual equals one membership, one vote, one card, and one database entry.**

5.1 Membership eligibility

Any living person may join a PTA, regardless of age, occupation, geographic location, familiarity with the school or district supported by the PTA, membership in other PTAs, or any other factor.

5.2 Individual members

Each person who joins PTA:

- **Has her or his name and contact information entered into the membership database.** This information must be reported to WSPTA and National PTA to initiate all benefits of membership.
- **Pays dues.** A local PTA chooses the amount it will charge for membership dues and includes this information in its standing rules. The total cost of membership must be sufficient to cover national, state, and (if applicable) council membership service fees and dues for each person who is enrolled as a member.
 - **National PTA dues:** \$2.25 per member
 - **Washington State PTA dues:** \$5.75 per member
 - **PTA council dues or fees (applicable only to those local PTAs that are part of a council):** Amount varies. Contact the council or region membership chair for more information.
- **Is entitled to all benefits of membership.** All paid members, regardless of age, have the right to voice and vote at local PTA meetings. They also receive a WSPTA membership card that gives them access to certain benefits.

5.3 Two-person memberships

To encourage more than one person to join at once, many local PTAs offer a two-person membership at a discounted rate. (For example, a local PTA may offer a single membership for \$12 and a two-person membership for \$20.) Any two people may enroll together in order to receive the discounted rate, which is why the term “family membership” is not recommended.

Remember that each person who joins is an individual member, and entitled to all rights and benefits of membership. When selling two-person memberships:

- **Ensure the two-person membership rate is clearly stated in your local PTA’s standing rules.** Remember, this rate must be sufficient to cover the dues for each individual.
- **Collect information for each individual included in a two-person membership, and enroll each individual as a member.** Provide enough space on your membership form for both names and corresponding contact information.

5.4 Teacher/staff memberships

As one strategy to encourage teachers and other school staff to join, some PTAs establish a special staff membership rate and/or scholarships for staff members. Keep in mind that staff members who join through such programs are entitled to all benefits of membership. A PTA may not require a staff member to join a PTA in order to receive a classroom grant or other funding allocated by the PTA's approved budget.

To ensure members have complete information about PTA programs and activities, including legislative advocacy, it's important that all contact information is included in the database. Because WSPTA's communications sometimes encourage specific action with respect to pending legislative proposals, do not use teachers' school email addresses. If teachers are reluctant to share a personal email address, they can obtain a free email address with many Internet service providers.

5.5 Student memberships

Any PTA is allowed to accept paid student memberships. Other than their name, there is no difference between a "PTA" and a "PTSA." A PTA does not need to change its name to "PTSA" to accept student memberships. **Students who have paid membership have all membership privileges and responsibilities.**

Note: Many PTAs have a clause in their standing rules that indicates that all students are considered honorary members without voice or vote. This clause is related to the laws around gambling activities, not to membership. It does not confer any membership privileges or responsibilities, nor does it prohibit students from becoming paid members of a local PTA.

5.6 Business memberships

Although a business cannot be a member of your PTA (e.g., Joe's Print Shop), the business owners or employees can be members (e.g., Joe Smith). As with all memberships, each individual joining a PTA must pay the membership dues and be enrolled in the membership database.

Note: A PTA may have "business sponsors" or "business supporters." This is not the same as membership. It must be in the local PTA's standing rules, and PTAs should avoid using the word "membership" when soliciting support or sponsors. These sponsors have no voice or vote.

5.7 Scholarships for membership

A local PTA may set up a restricted line item in its budget specific to membership scholarships, **to be funded by designated scholarship donations or by specific events or programs of the local PTA when it is clearly advertised at the point of sale that proceeds from that event or program will go to the scholarship fund.** These funds may be used to pay for partial or full financial assistance for PTA memberships.

- A restricted scholarship fund is created by a membership vote.
- Treasurers must track donations to the membership scholarship fund on a separate line item.
- PTAs may not use general funds to contribute to a membership scholarship fund. This is an IRS rule.
- A membership form may ask specifically for people to donate any amount to the membership scholarship fund to be put towards a PTA membership for another member or a staff member.
- Unused funds in the membership scholarship budget may carry over from year to year, but they may only be used to cover the cost of PTA memberships.

Example: Scholarship requests/donations

- Scholarship assistance requested (completely confidential)
100% assistance or partial assistance \$_____ (fill in amount)
- I would like to donate to the scholarship fund \$_____ (fill in amount)

6. Membership dues remittance process

At the end of each month, local PTAs that had new or renewing members join during that month will receive an invoice from WSPTA for those members.

The invoice will contain the following information:

- Total number of new/renewing members for that month.
- List of members included in the billing.
- Dues for state, national and (if applicable) council.
- Address to which payment should be mailed.
- Instruction to include copy of invoice with payment.

All local PTAs (whether the PTA is part of a council or not) send monthly payments for state and national dues directly to the WSPTA office. Each year, this will also include an annual \$5.00 fee that WSPTA collects to send representatives from the Outstanding PTA(s) of the Year to the National PTA convention. This fee only needs to be paid once per year.

For local PTAs belonging to a council, council dues assessed per member (for example, fifty cents per member) should be included with state and national dues and sent to WSPTA. The WSPTA office will then return that money to councils. All councils will receive a monthly statement of activity from WSPTA.

If a council charges local PTAs a flat fee per local PTA (not per member), the local PTA should pay that money directly to the council. For more information, contact the local PTA council.

7. Membership enrollment and membership cards

WSPTA uses a web-based system known as PT Avenue to enroll members. When a person pays for a membership, it is extremely important that the membership chairperson enrolls that member online on the WSPTA membership enrollment website. The PTA president, treasurer, and membership chair will receive a login and password for the membership enrollment website, along with detailed instructions on how to navigate the website and enter new members and renewals. Be sure to indicate the offices or other PTA positions held by members. WSPTA uses this information to create the distribution lists for leadership resources – it is important that the right people are on these lists or critical information may be missed.

Paid vs. enrolled

Please do not mark a member as paid in PT Avenue until her or his dues are paid. Then, ensure that the money is sent to state for that member promptly after the invoice is received. This membership money, used for state and national programs, is not for the local PTA.

WSPTA does not release members' names to outside organizations for commercial or other purposes. On occasion, WSPTA may distribute materials from outside organizations, but this is not done lightly. If members provide their email addresses, they can expect to receive messages from WSPTA when it is vital to reach our members with important information. If members' names and contact information are not in the database, they will not have the opportunity to learn about state PTA programs, nor the chance to help shape the WSPTA legislative agenda. Make sure email addresses are kept correct and current.

Check membership records online for duplicate names. The PT Avenue guide has instructions for how to delete duplicates, and this should be checked before the end of each month so that members are not invoiced more than once. Make sure that the entries are listed as individuals. For example, do not enter "Joe's Dry Cleaning," or "Smith family," or "sponsor #1." Detailed instructions for using the

online system are available from the WSPTA office (upon request) or can be downloaded from the WSPTA website.

If your PTA is audited by the IRS, they will ask to see members' names. If your PTA is tax-exempt under Section 501(c) (3) of the Internal Revenue Code, your members may deduct their membership dues if they itemize when preparing their federal income tax return.

Once members have been entered into the membership database, those members will receive a "welcome" email from WSPTA to indicate that they are now PTA members. The welcome letter will include the local PTA name and number, information about affinity programs and a link to activate their membership to take advantage of those programs, and a membership card that may be printed at home if they would like to carry a card with them. Of course, in order for members to get the welcome letter, their email address must be accurately entered in the database. For any member whose email address is not in our membership database, this letter will be sent to the designated email address assigned in the PT Avenue membership database, for printing and delivery to the member.

8. Membership planning calendar

Tasks due each month:

- Recruit and enroll new members. Involve the membership committee, board of directors, and other members in these efforts. Membership is everyone's job!
- Evaluate progress toward the membership goal at the end of each month, and communicate this progress with stakeholders and members.
- Pay monthly membership invoice to WSPTA.
- Send thank-you notes to new members.
- Write a newsletter article.
- Meet with the membership committee. Plan and implement any new approaches.
- Enroll members who did not join through the WSPTA website (via PT Avenue). Be sure to list/document the same fields as those created for PT Avenue. Make sure officers, who are already activated, are not entered a second time. Do not enter a member until dues have been collected.
- Submit all checks and cash from membership dues to the PTA treasurer immediately upon receipt.
- Discuss with the treasurer the necessity to send in the membership dues monthly.
- Serve as gatekeeper for your PTA to ensure that all communications, events, programs, and offers of assistance are branded with "PTA." The more potential members understand about how much your PTA is doing, the more likely they are to join your PTA.

July

- Read the *Membership Handbook*.
- Consult the membership page on the WSPTA website. Meet with the PTA president to discuss membership materials.
- Meet with the membership committee to review the results of previous years' campaigns and build new goals to present to the board of directors.
- Establish any membership benefits specific to the local PTA
- Review the budget for membership campaign promotions: posters, awards, prizes, leaflets, etc.

August

- Register to attend the region fall conference membership class.
- Working backward from your membership goal, set incremental goals at periodic dates. Communicate these goals to the board of directors and membership committee.
- Plan a membership campaign centered around a theme. Develop a timeline of membership initiatives based on achieving the incremental goals you have set. Get the approval of the board of directors for your plans.
- Update your membership form to reflect the current year, theme, dues, and contact information. The form should be available in at least four locations at all times. (For example, on your website, in your school's main office, on your Facebook page, on the PTA bulletin board, in the PTA closet/office, etc.)
- Ask the superintendent, school board president, or mayor to proclaim September "PTA Membership Month."
- Send copies of your "proclamations" to your local newspaper and television station with an article on PTA parent engagement in your school.

September

- Set up a membership table on the first day of school to welcome students and parents back to school. Stand in front of the table. Attach copies of your membership forms to clipboards to allow you to move around in order to best use your time and space.
- Be visible! Publicize and celebrate "PTA Membership Month."
- Send a letter home (with the first packet of information from the school, if possible) inviting everyone to join. Emphasize past PTA accomplishments and future goals.
- At all events and in all communications, completely remove any reference to "volunteering" from your membership materials. There should be no mention of volunteering on the membership form or at the membership table. Any volunteer sign-up or table should be located as far as possible from the membership table.

- Work with your school administrator to be part of the school open house.

October

- Send invitation letters to past presidents, former board members, your school superintendent, school board members, and other community leaders. PTA is for everyone!
- Work with your school administration to build a classroom incentive program that rewards all classes that achieve a pre-determined goal. Publicize this program at an assembly, with upbeat classroom visits, or by sending a letter home.

November

- Revisit your overall and incremental goals to determine if you are on track to achieve them. Share this information and make subsequent plans with the membership committee and board of directors.
- Review last year's membership roster for members who have not renewed and send them a special note.
- Distribute your membership form broadly once again.

January

- Plan a New Year's campaign to start the year off right.
- Membership numbers as of **the end of January will establish the number of voting delegates from a local PTA to the WSPTA convention.**

February

- Plan a special celebration for PTA's birthday month.
- Send in membership awards applications by the March 1 deadline.

March

- Plan special membership activities for the end-of-the-year celebrations.
- Make sure all members have been enrolled and membership dues paid by the end of March so that they can attend convention as voting delegates.

April

- Review this year's membership campaign, make written recommendations for next year's campaign and submit a report to the board of directors.
- Update the membership procedures book.
- Register next year's membership chair for the WSPTA convention.

- Consider starting to offer pre-paid memberships for next year. To do so, add a line item to your budget and financial reports indicating “pre-paid memberships for next year.” The PTA would hold these funds, entering them into the WSPTA online membership website only after notification has been received from WSPTA that the site is ready to accept new members. The membership dues would then be forwarded to WSPTA.

May/June

- Thank all of those who helped with this year’s membership campaign.
- Start planning next year’s campaign.
- Thank members for joining PTA in the last newsletter article, and encourage them to join next year.
- Work with the treasurer to reconcile the membership dues collected with the number of members enrolled in the online membership enrollment site.
- Membership numbers as of **the end of June will establish the number of voting delegates from a local PTA to WSPTA legislative assembly.**
- Download and print a copy of your membership roster. Use it next year to send membership renewal notices.
- Ensure members are all paid for and that the membership roster tallies with the invoice payments by the end of June.
- Close out your PT Avenue account for the year by the June 30 (or by July 15 if you have the full financial version of PT Avenue.)

9. Membership awards

To recognize the outstanding efforts of local PTAs that have set goals and successfully achieved membership increases, WSPTA administers an ongoing membership awards program. Every local PTA has an opportunity to increase its membership and be recognized for its efforts.

9.1 Membership incentives

Washington State PTA recognizes achievements to encourage membership enrollment early and throughout the year. **You do not have to apply for these awards.**

Bronze level: 50% of the previous year’s membership enrolled by September 30. This is the only membership incentive level with a deadline.

Silver level: 5% increase from the previous year’s membership.

Gold level: 10% increase from the previous year’s membership.

Platinum level: 20% increase from the previous year’s membership.

For the most current information on membership awards consult the membership section of the Washington State PTA website.

9.2 100% membership awards

The **100% Staff Membership Award** is presented to PTAs to recognize the value of teachers and school staff as stakeholders advocating for all children through PTA membership. This achievement serves as a great marketing tool to demonstrate the importance of PTA membership.

A PTA qualifies for this award by enrolling at least as many full-time or part-time, certificated or classified school staff members as there are full-time certificated staff members at the school. **PTAs must complete and submit an application form by March 1 to be eligible for this award.** The application form and instructions are on the WSPTA website. Recipients of this award are recognized at the WSPTA convention.

The **100% Membership Award** is the highest membership award offered by Washington State PTA. It recognizes that every child in the school community has a paid PTA member to be their voice. PTAs should be proud to use this as a marketing tool to encourage membership. What could be better than every child having an adult willingly join the PTA as a voice for their future? Recipients of the 100% Membership Award are honored at the WSPTA convention.

A PTA qualifies for this award by enrolling at least as many PTA members as there are enrolled students in the school. **PTAs must complete and submit an application form by March 1 to be eligible for this award.** The application form and instructions are available on the WSPTA website.

10. Membership FAQs

Why are there deadline dates for membership dues?

Membership dues are invoiced monthly (if members were enrolled the previous month) and must be paid promptly. There are dates established to track membership three times a year to establish good standing and voting delegates to state convention and legislative assembly.

- **October** – 25 paid members required, per the standards of affiliation agreement, to be a PTA in good standing.
- **January**- Determines the number of voting delegates your PTA can send to convention. PTAs with up to 200 members have four delegates. An additional delegate is allotted for every 100 additional members.
- **June** - Final payment of member dues and determines the number of voting delegates to the WSPTA legislative assembly in the next fiscal year. Delegates are allotted as for convention.

Do we need to keep a membership list?

- Yes, every PTA needs to keep a list of its members. The PTA membership chair should maintain the online membership site by updating it as new members

join. Include the member's name, address and contact information (phone number and email).

- Printed membership rosters are a part of the PTA's permanent records.

Who should have the membership list?

- The secretary and/or the membership chair should have a current membership roster available at every membership meeting.
- The financial review committee requires the list of members for the financial review.
- The nominating committee should receive the list for considering members to be proposed for offices. The nominating committee must verify that persons nominated are members and eligible for office.

Can our PTA sell "pre-paid" memberships?

Yes. A PTA may sell "pre-paid" memberships. To do so, add a line item to the local PTA budget and financial reports indicating "prepaid memberships for next year." The PTA would hold these funds, enter them into the WSPTA online membership website only after notification has been received from WSPTA that the site is ready to accept new members. The memberships would then be forwarded to either the council (if the PTA is in a council) or to WSPTA (if the PTA is not a part of a council).

Can our PTA give more funds to teachers who are members?

No!

What if our PTA has fewer than 25 members and therefore is not in "good standing"?

If a local PTA struggles to find members the PTA should apply for a waiver from the WSPTA executive committee before February 1 as detailed in *WSPTA Uniform Bylaws* (Article 3, Section 2). Contact the region director for assistance.

Local PTAs in a council used to make membership dues payments to the council. Will they still do this or are all membership dues sent directly to the WSPTA?

All local PTAs now remit membership and council dues directly to the WSPTA. But if a local PTA is part of a council that charges a yearly flat fee, the local PTA should send that payment directly to the council. Councils will be paid by EFT for their dues sent to WSPTA office.