

Riverside Council PTA

Riverside Council

Membership Training

every child. one voice.®

Resources

Riverside Council PTA: www.rcpta.org

23rd District PTA: www.23rddistrict.org

California State PTA online: www.CAPTA.org

The Toolkit online: www.Toolkit.CAPTA.org

National PTA e-learning: <https://member.pta.org/Shop/E-Learning-Library> AIM

Insurance Services: <https://capta.org/pta-leaders/services/insurance/>

Need Help? Reach out to us!

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The Basics of PTA Membership

 toolkit.capta.org/membership/membership-basics/

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.

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, students, if appropriate, and 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, and
- implements and evaluates the final plan.

The membership plan must be approved by the executive board.

Develop a Membership Marketing Plan

Set attainable 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 and the National PTA website, 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 capta.org.

- 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. 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 from the council or district PTA.

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 new [Customizable Membership Marketing Tool Instructions](#) flier and envelopes for first day packets or school registrations;
- 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.;
- tracking membership progress for incentive rewards;
- staffing a membership promotion booth or table at school or community events;
- making special invitations to community leaders, local businesses, elected official, community workers, 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.

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 (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 who, in return, support the unit with leadership, training, advocacy and other needed services.

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 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 through channels the required per capita membership and insurance. The district PTA will be notified that the 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. The same PTA membership card is used by all PTAs.

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 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 [Involving Students](#) for additional information.

If a PTA unit chooses to include a student membership dues structure with lower dues for students, the bylaws must be amended to reflect this structure. The student membership dues should be at least equal to the portion of dues which are 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. The unit bylaws must include that dues structure.

Family Memberships

If a PTA unit chooses to include a family membership dues structure, the bylaws must be amended to reflect this structure. The number of members per family should 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.



Online Membership Quick Start

Leaders Guide to Launching Online Membership for your Association

Congratulations PTA Leaders! You are just a few steps away from the ability to accept online memberships. This new capability provides many advantages for your association:

BENEFITS FOR ASSOCIATIONS

- Easily-promotable online membership signup page
- Automatic direct deposits to association bank accounts
- Automatic remittance to council, district, and state
- Instantly-updated membership roster & email list
- Simpler and more accurate accounting
- Auto-renewing memberships so you can focus on growth

BENEFITS FOR MEMBERS

- Secure, online signup with Credit Card or Mobile Pay
- Smartphone Membership Cards
- Self-management of communication and payment preferences
- Downloadable end-of-year tax documents

VIDEO:

<https://www.dropbox.com/s/raf5y973fzc3xym/CAPTA%202018%20Convention%20Video%20v1%20-%201080.mov?dl=0>

Launching Online Membership

We have made it easy to activate your associations' online membership site. The entire process can be completed in under 10 minutes.

1. Invite/Activate Leaders
2. Add & Verify a Bank Account
3. Customize Membership Signup

4. Launch Online Membership
5. Promote Online Membership

Five Easy Steps to Launch Online Membership

Please login to the portal:

<https://jointotem.com/dashboard>

1. Invite/Activate Leaders

One or more leaders from your associations will receive an email invitation to begin managing your association. The email will come from TOTEM on behalf of your parent association PTA. You may want to check your spam folder if you've been sent an invite, but have not received it.

When the invited leaders click the link, they will register and accept their leadership position, at which point they will have the ability to view and manage settings for the association.

To complete this step:

- Ensure the President has activated their account
- Ensure the Treasurer has activated their account
- Invite a third leader and ensure they have activated their account

VIDEO: How to invite a leader <http://bit.ly/eMembershipInvite>

2. Add and Verify a Bank Account

Connecting a bank account enables new memberships and donations to be directly deposited into your association's bank account. Your bank account information is entered and managed securely via our payment partner. This process includes two-factor authentication and double account verification for added fraud protection.

Q: Can our association use an existing bank account or do we need a new account?

A: Your association can use an existing account for this process. It is not necessary to create an additional checking account to receive directly-deposited funds from online membership.

To complete this step:

- The Treasurer (or President) must connect the existing bank account
- The President (or Treasurer) must verify the bank account number

VIDEO: Connecting a Bank Account: <http://bit.ly/eMembershipBanking>

Connecting a Bank Account is required in order to begin accepting online memberships and to receive automatic direct deposits. Two Leaders with bank accesses (Usually the President and Treasurer) are required to connect and verify a bank account.

If you are a leader of more than one Association, you will only be allowed to link a bank account for 1 Association.

NOTE: Only Checking Accounts can be linked - Debit Cards and Savings Accounts are NOT supported.

Payouts are made ~25th of every month

You are able to request a manual payout at anytime in your banking settings

STEPS FOR THE FIRST LEADER

1. Click the **Banking** menu
2. Click the **Add Bank Account** button
3. Complete the two-factor authentication process via Text/SMS to your phone
4. Verify the association information
5. Please enter D.O.B. as a means of a fraud protection measure for users
6. Enter the Routing number
7. Enter the Bank Account number (x2)
8. Click **Create Account**

STEPS FOR THE SECOND LEADER

1. Click the **Banking** menu or click the link in Bank Account Added email
2. Enter the last 4 digits of the account number
3. Click **Save**

3. Customize Membership Signup

Your association has 3 primary views that will be seen by members and can be customized for your organization: the Online Membership Signup Form, Welcome Email, and the Membership Details page.

The settings for your association including the Common Name of your association, About Us content, and social links are automatically displayed on these views.

To customize these settings, go to your Dashboard, then click Settings...Profile.

After you have verified all of your association settings, you can preview and further customize each of the views.

To complete this step:

- Verify the correct price for a membership (this is the fee documented in your association Bylaws)
- Set your suggested donation amount, donation callout, or turn off the donation option
- Customize and verify the About Us, Website URL and Social Links
- Set Display In Profile to On for any leaders that should be listed for members

How to Customize Association Branding

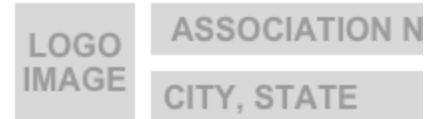
Leaders can customize many aspects of the association branding that is visible to members.

General Settings

General Settings for the association may be used in emails, web pages, and various forms on the site.

- **Common Name** - whenever the association name is displayed to members, the Common Name will be used if it is available. If the Common Name has not been entered, the full **Legal Name** will be shown
- **Logo** - a square logo for your association. If no logo is provided, it may default to a logo for your parent association
- **City, State** - In most cases, when the association name is shown in a heading, the City and State will also be displayed. These are taken directly from the **Address** for your association.

ASSOCIATION HEADER

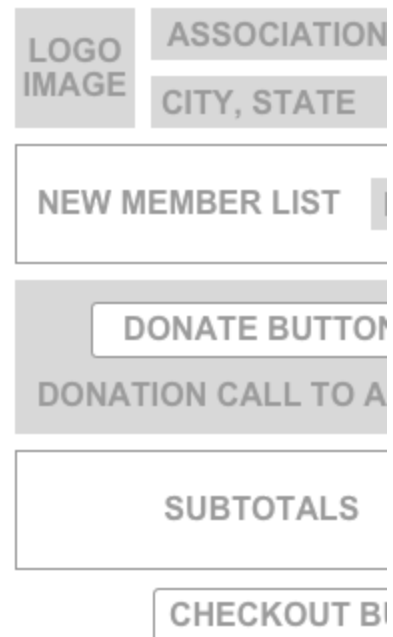


Settings in the Join Form

The signup form for new members to join your association can be customized with:

- **Welcome Message** - (Not show) The welcome message is displayed on the first screen of the join form, before the user adds to their Cart.
- **Membership Price** - The price is shown in the Cart for each of the members joining
- **Donation Options** - If Donations are enabled, the **Donation Call To Action** is displayed under the Donate button. When the Donate button is clicked, the member will be able to adjust their donation amount from the **Default Donation Amount**.

MEMBER JOIN FORM



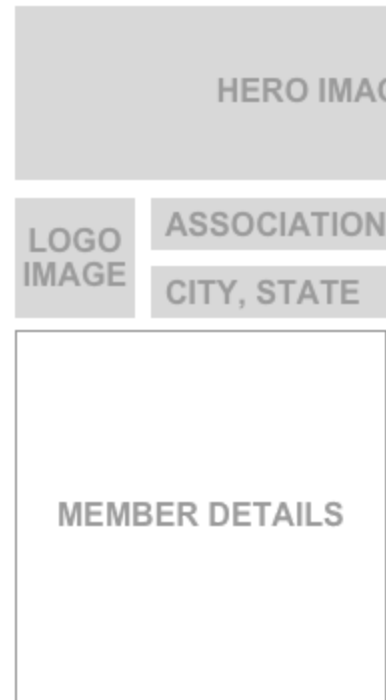
Settings in the Membership View

The Membership View contains all of the information about your association available to members.

Customizations on the Membership View include:

- **About Us** - General description of your association. If not set, this may default to the About Us value for your parent association.
- **Homepage Link** - A link to the homepage for your association.
- **Benefits Link** - A link to a page with a list of benefits available only to members of your association.
- **Social Links** - A list of links/icons to Facebook, Twitter, and other social media or websites you want to make readily accessible to your members.
- **Leader List** - A list of the active Leaders for your association. To display leaders in this list, set **Display On Profile** to ON from the Leader List View .

MEMBERSHIP VIEW



4. Launch Online Membership

Once the prior steps are completed, our team will be notified and we will verify your settings to activate your account. Once verified, your leadership team will receive an email that Online Membership is live and instructions for next steps.

To complete this step:

- Complete the prior steps (TOTEM handles the final step)

5. Promote Online Membership

To complete this step:

As a user who purchased a membership for a unit, please follow these steps to locate promoting online membership : login-->memberships-->click on unit (view membership details)-->tell the world you joined

As a leader of a unit, please follow these steps to locate promoting membership online:

login-->settings-->applets-->promote

- Link your new Online Membership page to your existing website
- Share your Online Membership page with your school's Principal, Ed Foundation, and other partners so they may link to it

- Add your Online Membership link to your Facebook, Twitter, Instagram, Pinterest pages
- Send an Email Blast to your prior year members to announce Online Membership