

Membership Handbook 2021-2022

Washington State
PTA[®]
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This handbook is intended to serve as a guide for local PTA and council membership chairs.

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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 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—over 100,000 strong across Washington.

PTA is a membership association. People join PTA to show support for the work PTA does locally to benefit their child and community, and 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!

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.

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 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 *Managing Your Nonprofit PTA*. *PTA and the Law* is a class that is offered yearly across Washington. 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. *Managing Your Nonprofit PTA* 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. Both the class and the handbook deal 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 may be available to support the needs of local PTA membership chairs. In each region, there may also be a membership specialist available to assist local PTA membership chairs. Please reach out to your council or region service delivery team, 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 diverse cultures.
- 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 in the WSPTA membership database all members with a paid membership for the current year.
- Work with the treasurer to ensure all payments to WSPTA and (if applicable) council are made accurately and timely.
- 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.
- Parent education
 - Provide networking opportunities with other parents and PTAs.
 - Resource materials available through WSPTA and National PTA.

- Classes offered on issues that impact parents at WSPTA Convention.
- Informed and trained leadership
 - WSPTA offers numerous leadership training opportunities and publications.
 - National PTA offers e-learning, publications, and 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 the membership database.
- Programs
 - Ideas and resources for effective local programs.
 - National PTA Reflections arts recognition program.
 - WSPTA Essay Contest, School of Excellence, and more.
- PTAs in Washington 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 *Membership News* 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 115 years.**

5. Types of membership

PTA is an individual member association, which means Washington State PTA is an association of individuals who choose to join to support the work of 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 a “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 Individual members

Each person who joins PTA:

- **Has their 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 PTA member may pay dues directly or through a membership subsidy. 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 and state dues for each person who is enrolled as a member. Council PTAs may owe per-member member service fees. These service fees may be added to the amount of a local PTA's membership dues, or they may be paid from a PTA's general funds.
 - **National PTA dues:** \$2.25 per member
 - **Washington State PTA dues:** \$5.75 per member
 - **PTA council fees (applicable only to those local PTAs that are part of a council):** Amount varies. Contact the council 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 member benefits.

5.2 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 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.

5.3 Teacher/staff memberships

As one strategy to encourage teachers and other school staff to join, some PTAs establish a special staff membership rate or scholarships for staff members. Keep in mind that staff members who join PTA are entitled to all benefits of membership. **A PTA may not require a staff member to join a PTA to receive grant funds 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.

5.4 Student memberships

Any PTA may 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.

5.5 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, everyone joining a PTA must pay membership dues and be enrolled in the membership database.

Note: A PTA may have "business sponsors" or "business supporters." This is different from membership. It must be in the local PTA's standing rules, and PTAs should avoid using the word "membership" when soliciting sponsors. Sponsors have no voice or vote.

5.6 Subsidized memberships

A local PTA may set up a restricted line item in its budget specific to subsidized memberships, **to be funded by specified 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 specified membership fund. A local PTA may set up a designated line item in its budget specific to subsidized membership. This line may be added to using funds from the PTA's general fund, in accordance with the local PTA's standing rules and membership subsidy policy.** These funds may be used to pay for partial or full financial assistance for PTA memberships.

- Either a restricted subsidized membership budget line or a designated subsidized membership budget line must be created by a membership vote.
- Membership forms must ask if the person wants part or all of their dues covered by subsidized membership funds.

- Treasurers must track donations to the restricted membership fund on a separate budget line as well as funds moved from the general budget to a designated membership subsidies budget line.
- A membership form may ask specifically for people to donate any amount to the subsidized membership fund to be put towards a PTA membership for another member of any kind.
- Unused funds in the subsidized membership budget may carry over from year to year, but they may only be used to cover the cost of PTA memberships.
- Individuals may gift memberships on behalf of specific other individuals by directly paying for their membership dues.

<p>Example: Scholarship requests/donations</p> <p><input type="checkbox"/> Subsidized membership requested (completely confidential) 100% assistance or partial assistance \$_____ (fill in amount)</p> <p><input type="checkbox"/> I would like to donate to help provide PTA membership for others in the amount of \$_____ (fill in amount)</p>

The membership section of the budget might look like this:

Budget Line	Income	Expenses	Net	Notes
Memberships	\$3000	\$1600	\$1400	200@\$15 as income; \$8 WSPTA and National PTA dues as expenses
Membership Subsidies – Restricted	\$120	\$120	\$0	15@\$8 from individuals as donations . Any remaining funds carry forward in the restricted fund next year.
Membership Subsidies – Designated	\$80	\$80	\$0	10@\$8 designated from the general fund . Any remaining funds carry forward in the designated fund next year.

For other examples of how subsidized membership could look on a membership form, please refer to the [Leadership Guides page of the website](#) in the Board Resources/Policies and Rules section.

6. Membership dues remittance process

Dues collected during online member registration through the database shall be transferred electronically to the bank account established in the database by the local PTA. Each local PTA must have a bank account established in the database to receive these funds.

After the end of each month, if there is a balance due, the database shall generate and send to each PTA an electronic invoice for WSPTA and National PTA membership dues.

Payment shall automatically be made in full via ACH through the database on the due date shown on the invoice. WSPTA and each local PTA must have a bank account associated with the database ACH system for processing dues payments.

For most local PTAs belonging to a council, council fees will be invoiced on a monthly basis. Payments to councils shall automatically be made in full via ACH through the database on the due date shown on the invoice. Councils and each local PTA must have a bank account associated with the database ACH system for processing fee payments.

For more information about council fees, contact the council within your designated area.

7. Membership enrollment and membership cards

WSPTA uses a web-based database, known as memberplanet, to enroll members. It is extremely important that every member with a paid or subsidized membership for the current year is enrolled in the WSPTA membership database. The database is the source of membership information for each PTA, and is used to report required membership counts to National PTA. 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. Check before the end of each month and delete duplicate names 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 can be found on the memberplanet Success Site.

If the IRS audits your PTA, they will ask to see the PTA's membership roster. 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, as long as dues are under \$75 per person.

For each new member entered into the membership database, a membership card will be electronically distributed through the database system. For any member without an email address in the database, the local PTA will be responsible for the distribution of membership cards to those members.

WSPTA membership database

At least one database admin user will be set up for each PTA. The admin user can give access to other officers. The database is also used for communication, particularly with elected PTA officers and volunteers in key positions. It is important to enter all elected officers, volunteers in key roles (e.g., membership, advocacy, Reflections, communications) and other volunteer chairs, and keep contact information current and accurate. This ensures they are included on the correct email lists to receive information critical to their role in PTA.

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.
- Review the membership roster and correct any errors.
- 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 memberplanet). Be sure to list/document the same fields as those created for memberplanet. Do not manually enter a member until dues have been collected.
- Submit all checks and cash from membership dues to the PTA treasurer immediately upon receipt.
- Review the monthly dues invoice in the membership database before payment is due. Report any discrepancies to WSPTA.
- Ensure that all communications, events, programs, and offers of assistance are branded with "PTA." The more potential members understand about how much the PTA does, the more likely they are to join.

July

- Read the *Membership Handbook*.
- Update membership packet in the membership database to reflect changes for the new year.
- Ensure that all information for elected officers has been entered into the membership database.
- 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.
- If the PTA is using an online join method, make sure the content is updated and the links work before sharing on your Facebook page, website, and other social media.
- Working backward from the PTA’s 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. Get the approval of the board of directors for the membership plan.
- Update the paper membership form to reflect the current year, theme, dues, and contact information. The form should include a link to join online, if applicable. The form should always be available in at least four locations. (For example, on a website, in the school’s main office, on a 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 family 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 the membership forms to clipboards to allow for movement and the best use of 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 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 the 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 asking them to join PTA. PTA is for everyone!
- 25 members must be entered in the membership database by October 31 to remain in *good standing*.

- Work with the 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 the overall and incremental goals to evaluate progress. 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 the 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 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 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 offering pre-paid memberships for next year. To do so, add a line item to the budget and financial reports indicating “pre-paid memberships for next year.” The PTA may set aside these funds entering them, after July 1, into the WSPTA online membership database.

May/June

- Thank all of those who helped with this year’s membership campaign.
- Update officer contact information in the membership database after elections.
- 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 establish the number of voting delegates from a local PTA to WSPTA Legislative Assembly.**
- Download and print a copy of the membership roster for the PTA's permanent records and a copy for the treasurer for the year end financial review.
- Ensure members are all paid and that the membership roster tallies with the invoice payments by the end of June.

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 growth awards

Washington State PTA recognizes membership growth in local PTAs and councils to encourage membership enrollment early and throughout the year. Membership Growth Awards are calculated monthly and announced via the WSPTA website and social media outlets. **Local PTAs and councils do not have to apply for these awards.** Councils are awarded using the same tiered system (Bronze, Silver, Gold, and Platinum) used for local PTAs, and awards are based on total enrollment for all PTAs in the council. PTAs that reach each level receive a digital publicity kit containing graphics and ideas for sharing their achievement.

Bronze: Member enrollment that exceeds the PTA's total membership from the prior year.

Silver: 105% of the previous year's total membership.

Gold: 110% of the previous year's total membership.

Platinum: 120% of the previous year's total membership.

PTAs must be in good standing in order to earn membership growth awards. If a PTA had fewer than 25 members the previous year, it must have 26 members enrolled to earn a Bronze award for the current year. Silver, gold, and platinum awards will be awarded as if the PTA had 25 members the previous year.

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

9.2 Membership Achievement 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 is 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 the March deadline 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 apply by the March deadline 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?

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 members must be entered by October 31 for a PTA to be “in good standing.” Good standing impacts eligibility for program participation and grants from WSPTA and National PTA. A PTA who has not entered 25 members by October 31 should do so as soon as possible.
- **January** - Determines the number of voting delegates a PTA can send to convention. PTAs with up to 200 members have four delegates. An additional delegate is allotted for every 100 additional members. A PTA must have 25 members as of January 31 to be able to send delegates to Convention.
- **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. A PTA must have 25 members as of June 30 to be able to send delegates to Legislative Assembly.

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 and will be required by the IRS if the PTA is audited.

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 a 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 "pre-paid memberships for next year." The PTA would set aside these funds, enter them into the WSPTA online membership database only after notification has been received from WSPTA that the site is ready to accept new members. The memberships would then be forwarded to WSPTA.

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

No! Your PTA exists to serve a public purpose, not a private one. This is an IRS regulation.

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

If, due to extreme circumstances such as a temporary school closure, a local PTA will be unable to enroll 25 members by the end of the fiscal year, it may request a waiver from the WSPTA executive committee after the October 31 deadline.

Membership waivers may not be granted to the same local PTA more than two consecutive fiscal years in a row. Special circumstances may arise where local PTAs can work with the WSPTA executive committee for approval.

How will WSPTA collect membership dues and council fees?

1. When a member joins online, their membership dues will be deposited directly into the local PTAs bank account that has been established in the database to receive those funds.

2. After the end of the month, if there is a balance due to WSPTA for state and national dues, the database will generate and send an electronic invoice for the WSPTA and National PTA membership dues. That invoice will automatically be paid via ACH through the database to WSPTA.
3. If a local PTA is part of a council, the database will generate an electronic invoice for council fees. Those fees will be paid automatically via ACH through the database to the council account identified.