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How to Contact Council

By Phone: (619) 297-7821

By E-mail: sducpta@yahoo.com

By Fax: (619) 297-2152

By Mail: San Diego Unified Council of PTAs
c/o Ballard Parent Center
2375 Congress Street, Bungalow 7
San Diego, CA 92110-2318

Note: You can use U.S. mail or school mail.

On the Web: www.sdcouncilpta.org

In Person: Check the website for office hours. The
office is staffed by volunteers so call before
coming to make sure someone will be there.
If you can’t come during normal office
hours, you may call the office to make an
appointment.

Parking: The closest parking is the parking lot behind
the Ballard Center – enter from Jefferson
Street. We are in Bungalow 7.

Transit: We are located less than one-half mile from
the Old Town Transit Center.
Dear PTA Membership Chairman,

Here it is – your PTA Survival Kit!

Inside are the most important materials you’ll need for your new position.

Keep this folder handy throughout the year. Take it to meetings. Re-read it, as necessary. If you don’t find the information you need here or in your Bylaws, go to the California State PTA Online Toolkit – at toolkit.capta.org. If you can’t find it there or you’re still unsure, contact the Council. We’re here to help.

You’re now part of the oldest and largest child advocacy group in the United States – five million members strong!

Although we’re a national organization, the key to PTA is the unit level – and that’s You! You and your board are the heart of PTA because you directly impact the children, parents and teachers at your school.

PTA board members also learn how to run an organization -- financial management, event planning, team-building and yes – Robert’s Rules of Order! These leadership and organizational skills will benefit you for years to come.

Take advantage of all the training and resources we have to offer here at the Council to make your year go smoothly! We’re located in the Harold J. Ballard Parent Center in Old Town – come and visit us often. Office hours are posted on our website.

I look forward to meeting each and every one of you. Have a fantastic year!

Celeste Bobryk-Ozaki
President
San Diego Unified Council of PTAs
Job Description for
Membership Chairman/Vice President
2327 L Street, Sacramento, CA 95816-5014

PTA is a membership association, and membership is the heart of PTA. Crucial to any PTA’s health and success is a membership that is representative of its community. Along with the entire board, the president and the membership vice president or chairman are partners in guiding and directing the membership committee in an effective and successful yearlong membership campaign and in growing a membership that is representative of the entire community.

Every PTA/PTSA should have a position dedicated to membership, whether it be a chairman or vice president. The unit, council and district PTA membership chairmen/vice presidents are either appointed or elected by their respective executive boards.

The major responsibilities of the membership chairman/vice president are:
1. Make membership growth and retention a prioritized goal of the PTA;
2. Collect and reconcile membership dues with financial officers;
3. Distribute membership cards; and
4. Provide regular membership reports.

Each member of the membership committee has a vital role to play in the ongoing membership promotion and must always be included and involved in all aspects of the committee's goals, duties and responsibilities.

The major responsibilities of the membership committee are:
1. Create a plan that attracts new members and retains previous members;
2. Build an informed and active membership that supports the PTA's mission, goals and programs;
3. Promote and celebrate successes with members and within the community;
4. Develop an outreach component within the campaign for underrepresented groups;
5. Identify barriers to involvement such as language, culture, childcare, transportation, etc.; and
6. Include a student involvement element in the campaign.

The membership committee should meet before the beginning of the school year to establish the membership goals, design the membership and outreach promotion, and plan yearlong duties and activities. Create a marketing plan that promotes your PTA's successes and the work of the PTA so that new members will be informed and attracted to join, and current members will be motivated to renew their membership. The membership plan must be approved by the executive board.

Consult the California State PTA Toolkit, the California State PTA website and National PTA Quick-Reference Guide for additional information on how to be an effective membership chairman/vice president.

Contact council or district PTA for current membership information, council or district due dates for per capita remittances, awards and recognitions offered and PTA materials. Refer to www.capta.org and the California State PTA “List of PTA Materials” to order free membership brochures.

Attend PTA workshops designed to train and assist membership chairmen/vice presidents.

**CREATE A MEMBERSHIP DEVELOPMENT PLAN AND CALENDAR**
The following guidelines are meant to help membership chairmen/vice presidents develop and implement effective membership campaigns.
Obtain a procedure book from the previous membership chairman (Refer to the *California State PTA Toolkit*, Procedure Book 2.3.4). Meet with the PTA president and membership committee: treasurer, room representative coordinator, publicity and hospitality chairmen, school administrator, teacher and student (PTSA).

Study last year’s membership committee plan results. Set goals. Prepare a budget.

Adopt a membership theme and discuss an appropriate challenge/goal.

Create a membership calendar. Consider due dates set by council (if in council) and district. September and October are usually designated as PTA membership campaign kickoff months but membership recruitment activities should take place all year long. California's membership year begins on July 1 and ends on June 30.

Plan a membership promotion campaign that uses a variety of methods and outreach activities to promote the value of PTA.

Present the yearlong membership plan to the executive board for approval. Enroll all members of the executive board at the first meeting (all officers and chairmen must be members of the PTA).

Contact the council or district PTA to determine the cost of membership envelopes. Order envelopes prior to the campaign kickoff. Membership cards are provided at no cost by council or district PTAs.

Develop a plan that ensures that every member receives a membership card.

Refer to the unit's bylaws or contact council or district PTA for per capita remittance due dates. Per capita for the minimum number of members (15) must be received by the district PTA by November 15 of each year. December 1 is the last day a district PTA may remit a unit's per capita to keep that unit in good standing.

**IMPLEMENTING THE MEMBERSHIP CAMPAIGN**

Announce the membership theme.

Create an invitation letter that includes information about the membership campaign, accomplishments of your PTA in support of students and families, benefits of membership, and information about the organization as a whole.

Include PTA contact information.

Send invitation letters along with membership envelopes home with all students for family members to join PTA/PTSA. Translate invitations as needed. (Refer to the *California State PTA Toolkit*, Sample Letter, Fig. 3-1.)

Include the membership invitation letter and envelope in the new school year first-day packet.

Encourage the return of all membership envelopes, full or empty, by recognizing all students for their efforts.

Send invitation letters to teachers, administrators, school board members, leaders of diverse community groups, community members, and other friends of PTA, including past PTA presidents and board members. (Refer to the *California State PTA Toolkit*, Sample Letter, Fig 3-2 – 3-5.)

Create and display membership posters. Promote the theme throughout programs and activities.

Include student involvement in your campaign promotions and activities.

Provide information about PTA’s purpose and activities. Use as many methods of communication as possible.

Use mail or e-mail, when appropriate. If using e-mail, make sure the message is delivered to everyone.

Submit articles to the PTA or school newsletter, website and local newspaper(s) throughout the year. Include PTA contact information for those wishing to join. Refer to Sample Press Release Fig. 6-3.

Send public service announcements to local TV and radio stations.


Translate articles into other languages, as needed.

Set up a PTA membership and information table at school registration and at all school and PTA events.

Welcome everyone and encourage involvement at open house, back-to-school and PTA association meetings.
Create a welcome packet to distribute to new families throughout the year. Include an invitation to join PTA, meeting dates and description of PTA programs and projects. Have them available in the school office for late registrants and families who join the school community at other times during the school year. (Refer to the California State PTA Toolkit, Creating a Welcome Packet, 3.4.2.)

**DUES COLLECTION**
Contact the school principal to establish the process for the daily collection of membership envelopes without taking away valuable classroom time.

Check into school procedures regarding specific distribution and collection of school materials. Develop a process acceptable to school staff for the collection of membership envelopes. For example, membership envelopes can be sent to the office along with routine school paperwork.

Collect membership envelopes promptly each day. The staff should not be responsible for this money.

Assign at least two people to count cash and checks. One should be a financial officer or a chairman. Have all those involved in counting money verify and sign the Cash Verification form. (Refer to the California State PTA Toolkit, Forms 9.) Forward promptly to the treasurer or financial secretary of the PTA.

Ensure that per capita is forwarded regularly – at least monthly. California State PTA must receive membership remittances of per capita by December 1 for a unit to remain in good standing.

**ONGOING DUTIES**
Fill in the membership cards with the PTA name, the National PTA unit identification number (available from the district PTA), the member’s name, the date the member joined and the annual expiration date, October 31. Membership cards can be completed by hand or, printed using Just Between Friends or any customized or independently developed card template.

Members should receive their membership cards promptly and be encouraged to sign the card immediately. Remember – one member, one card, one dues payment – not “Family of ____” or “Mr. & Mrs. ____”

Alphabetize and retain membership envelopes or membership applications for at least one year.

Maintain a printed list/directory of members, updating as new members are enrolled. Provide copies to the unit president, and secretary. The membership list should be available at association meetings to determine who is eligible to vote and be provided to the nominating committee. The list of the association shall be for the exclusive use of the organization and shall not be available for distribution or purchase by any other organization or commercial entity.

Check the previous year’s membership list and reach out to those who have not yet joined PTA by making a personal contact.

Request additional membership cards from the council or district PTA, as needed after remitting per capita equal to, or almost equal to, the amount of cards in the unit's allocation.

Provide a membership update at each PTA board and association meeting and reconcile with the treasurer.

Make efforts to qualify and/or apply for available awards. (Refer to the California State PTA Toolkit, membership Awards and Recognition 3.8.)

Review and update the records of membership activities.

**END OF TERM**
Bring the membership procedure book up to date for the incoming membership chairman/vice president.

Evaluate the year’s program and make written recommendations for the coming school year.
Provide a final membership list to the unit president and secretary. Retain a copy for the membership procedure book. The membership list should be kept for a period of three years.

Make sure that all membership enrollment records are in order, accurate and balance with the treasurer’s records. (Per capita that is discovered during the summer audit not to have been forwarded during the year must still be forwarded during the next year.)

Turn over all membership materials and procedure books to next year’s membership chairman/vice president or president. These records should include an accurate financial accounting of per capita dues sent to the council or district PTA; an outline of the year’s activities; a copy of the membership list; a roster of the membership committee, complete with addresses and telephone numbers; a copy of the evaluation with recommendations; and any membership resources.

SPECIAL CONSIDERATIONS FOR YEAR-ROUND SCHOOLS
PTA/PTSAs in year-round schools should consider the following when developing their membership procedures and calendars:

- Appoint volunteers to the membership committee who represent all tracks at the school.
- Assign members of the committee to oversee and support the membership campaign for each track.
- Review the membership budget. Additional funds may be required.
- Schedule the membership enrollment period to overlap a “track-on” and “track-off” period. For some schools, this will provide all tracks an opportunity to participate within a two-to-four week period.
- Begin the membership campaign with an event all tracks are able to attend. Some year-round education schedules allow for all tracks to be in attendance at school on the same day. Otherwise, schedule a weekend activity.
- Set up a PTA information and membership table near the school entrance on the first in-track day of each track.
- Communicate with families that are “off-track” during the membership enrollment period to keep them informed about membership activities, and encourage them to join PTA.
- Consider ordering membership envelopes a year in advance. Color-code the membership envelopes to identify the different tracks.
- Make sure the membership campaign is visibly promoted during every track and throughout the year.

MEMBERSHIP ACTIVITIES CHECKLIST
- Discuss and decide on your PTA’s membership theme and membership goal.
  - Publicize it in many ways: on your website, in a registration packet, issue a press release, display posters at school.
  - Visually represent your goal and its progress a prominent place.
  - Consider either the California State PTA membership challenge as a goal, or set your own.
- Include your membership invitation in the school’s summer mailing or newsletter.
  - Have the invitation available in the office for late-registering families as part of a welcome packet.
- Include the following in your invitation letter:
  - Information about your campaign (theme, goals, anyone can join);
  - What your PTA has provided/plans to provide for the school and community;
  - What membership means (benefits of being a member, having a voice); and
  - Reference to the other levels of PTA and what they offer.
- Create a teacher/staff-specific invitation to encourage staff membership.
  - Ask your principal to join PTA and promote PTA membership to the staff.
  - Think about offering a particular incentive to encourage staff participation.
• Advise staff about the teacher and nurse continuing education scholarships available through California State PTA.

☐ Discuss who is not represented in your PTA and make a plan for outreach to the community, including nonfamily members and others.

• Identify those who are not members but should be included so that your PTA truly reflects your community.

☐ Include PTA contact information in every PTA or school newsletter for those interested in joining or getting in touch and make sure the office provides contact information to those who request it.

☐ Set up a membership table at every PTA and/or school event with brochures or other giveaways to inform people about PTA. Include events such as:

• Registration days and/or orientations for new students/parents; and

• Student performances and other events at school.

☐ Use PTA brochures and other resources to promote/market PTA and explain the benefits of PTA.

☐ Make sure that every member receives his or her individual membership card.

☐ Keep a membership list with contact information for all members.

☐ Contact previous year’s members if they do not re-join to make a personal “ask”.

☐ Report regularly at PTA meetings on the membership total and additional memberships received.

☐ Regularly remit all per capita/dues for new memberships to the unit treasurer and make sure they are forwarded through channels (at least monthly).

01/2011
PTA Executive Board Officers

Welcome on board. You have now joined the largest volunteer organization for the welfare of our children. Your job for the next year is to run a mini-business.

Think of it as mini, in the sense that the overall income will usually be under $50,000 indeed most PTAs run under $25,000. Almost all of the rules below apply to any non-profit; it is not unique to the PTA.

Think of it as a business, because that is exactly what it is. All the rules and regulations that we at the San Diego Unified Council of PTAs present you with are the rules and regulations that all non-profits have to follow. We are here to keep your PTA in Good Standing, so you can continue with the business of supporting your students on a daily basis.

Rosters – The Council, District, State and National PTA need to know who you are. It is an IRS requirement. None of the information is ever released to an outside agency. Your data is safe. Rosters are due May 1 each year. If your unit has not filled all the positions, send in what you have. If your unit has not had elections then let us know so we can help.

Membership – to keep Good Standing and non-profit status, a PTA needs to have a list of its members. You do not need to send your membership list to council but we do need a report on your volunteer hours. Send the Council PTA the Annual Historian Report (think volunteer hours). Keep the membership rolls for three years. Easiest way is to paste them in the Secretary Book at the end of the year. There is no upper limit to membership and membership is open to all parents, students, teacher, relatives, and community members.

Minutes – as a non-profit and a membership driven group, keep accurate minutes on what activities your PTA has approved. Membership enrollment numbers are entered in the minutes of the Executive Board each month. Keep the minutes in a bound book and keep your PTA minutes forever.

Taxes – All non-profits must file taxes no matter how small their income. If any non-profit goes three years without filing taxes, it will be shut down – not by the PTA but by the IRS. Provide the council of a copy of your tax return. We will send out reminders to file your returns for State and Federal. Copies of tax returns should also be entered in the Secretary books as part of an Executive or General Meeting. File your taxes as soon as you can after your Year-End Audit.

RRF - All California charitable organizations must file an annual report with the California Attorney General. This form is called RRF or Registration Renewal Fee Report. This report is due the same date as tax returns. Failure to submit this report annually may result in the loss of tax exemption and the assessment of a minimum tax of $800 plus fines. See the page on RRF for information on filing.

Audits – audits will provide you with the accurate information to file your tax return. Audits make sure that the minutes and the accounting books match. All Audits Reports should also be entered in the Secretary books as part of an Executive or General Meeting. A PTA should be performing a mid-year audit and a year-end audit or whenever you have a change in the check
signer. The audit is performed by the elected Auditor or can be performed by an appointed general member of the PTA, or by an Audit Committee. If you do not have an auditor, the Council will help you perform your audit or we can do the audit for you.

**Financial Data** – to keep your business on track, we at the council keep a record of your financial data. Here is a list of what we need – **Proposed Budget** at the beginning of the year, **Mid-Year Audit** report, **Year-End Audit** report, **Year End Financial Report**. These items should also be entered in your Secretary books as part of an Executive or General Meeting. Keep your financial data for seven years.

**Membership Dues** – all Membership dues not belonging to the unit are **sent to the council on a monthly basis**. So, for each member, forward $5.75 to our Council. The membership year for the State starts July 1 and runs through June 30. If it does not coincide with your PTA financial year, don’t worry, it doesn’t have to. Your PTA does not need to approve the writing of the checks to our council to send in your dues. This money does not belong to your PTA, so it does not need authorization. Use the **Cash Verification Form** for processing membership and the **Unit Remittance Form** to send on the dues.

**Insurance** – California State PTA negotiates insurance to cover PTA approved activities. It is a bargain. The insurance payment is sent to the Council and we forward it on. Because the PTA is large this insurance comes to each unit at a very reasonable rate and is one of the perks of being a PTA. For any activities not covered by our basic insurance, your unit can add coverage by simply picking up the phone and talking to Knight Insurance Service.

**Council Assessment** – This **yearly assessment of $50.00** was voted on by the Unit Presidents of the San Diego Unified Council of PTAs. What do you get? You get a Council PTA that can support your unit with training, and individual help when you need it.

Remember these rules are not here to keep you from doing business. These rules are here to help you to be a successful non-profit.

If your PTA needs help, just call us at (619) 297-7821 or email us at sducpta@yahoo.com and we will get back to you as soon as possible.

The San Diego Unified Council of PTAs represents you and your members.
2015-16 Membership Campaign Information

PTA means school, community and family working together to support our students so they can be successful at home, at school and in life.

Membership Materials

- Membership envelopes are available at Council or Ninth District offices. Cost is approximately $3.00 per hundred envelopes

- New membership cards are only available at the Council office.
  - Template available to fill out cards on www.pta.org under PTA Leaders Running your PTA

- 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. Please contact your district PTA for more information.

- LEGOLAND California and SEA LIFE Aquarium offer exclusive PTA member discounts - Legoland is a partner with PTA and offers a special PTA discount exclusively for PTA members. At the time of this printing, we don’t know how Legoland is planning to distribute coupons. If you would like to hand out Legoland discount coupons with your membership cards, please contact the Council for updated information.

- California PTA offers a membership flyer template on their website. You can customize it for your PTA. Go to www.capta.org and click on PTA Leaders, Run your PTA and scroll down to Building Membership and Marketing your PTA
Membership Awards for unit PTAs
Can you do better than last year?
Your Unit’s 2014-15 Year-End Membership: ____________________

Membership Incentives & Awards

California State PTA's 2015-16 membership year runs from July 1, 2015 to June 30, 2016.

Each unit PTA must adhere to the due dates set by their council and/or district PTA. Councils and districts set their own due dates in order to meet the state PTA deadlines. When sending in your remittance to your council and/or district PTA, please allow additional time for processing and mailing.

Remittances of "per capita" should be forwarded by every PTA at least monthly, and sent to your council and/or district PTA. “Per capita” means per person dues, and is the portion of membership dues not belonging to your PTA. The unit (school) PTA remits to the council PTA (or if out of council, to the district PTA). The council PTA remits to the district PTA. The district PTA remits to California State PTA. California State PTA remits to National PTA.

Building your PTA membership can really pay off for your school. Not only will your PTA have the support of parents and families, but your PTA could qualify for awesome membership challenge incentives.

For a list of the 2015-16 Membership Incentives and Awards,

Visit the San Diego Unified Council of PTAs website at https://sdcouncilpta.wordpress.com/

A list of Membership Incentives and Awards and due dates will be posted on the website by September 2015.
How to conduct an easy PTA Membership Campaign at your school.

Step 1: Pick a Theme
Pick your own theme. Connect it to your school mascot “Soaring with Eagles” or use a theme with a visual icon such as a “heart”, “hand” or “flower” you can use in step 4.

Step 2: Set a Membership Goal
Find out what your membership was last year and set a goal to increase that number by at least 5%. If every PTA in California increases by just 24 members, we can reach 1 million members statewide and be a stronger voice for children!

Step 3: Offer incentives
Here are some examples of incentives that work:
- Elementary level - the classroom with the most PTA members gets a pizza party.
- Elementary level - every class with 100% return of membership envelopes receives an incentive (even if the envelopes are empty)
- Order exclusive PTA LEGOLAND coupons and give to everyone who joins your PTA.
- Ask your principal to do a wacky stunt if you reach a certain membership goal.

Step 4: Send out your Invites
Prepare a PTA flyer highlighting what PTA programs – art assemblies, family nights, book fairs, college night for parents, etc. Send the flyer with a membership envelope to every student at your school. PTAs have standing authority from San Diego Unified to send membership envelopes home with children and for children to return membership fees to school (Administrative Procedure #9325). This saves you on postage. If you have many non-English speaking parents in your school, consider having your invite translated.

Tip: Remember anyone can join your PTA – children (school age), parents, grandparents, cousins, aunts, uncles, friends, businesses, community members – anyone who wants to advocate for children.

Step 5: Make a Visual Display of your Campaign
Ask your principal for some wall space – it can be in the auditorium, the cafeteria, the school office or any high traffic area. Use this area to show the results of your campaign. One school dramatically increased their membership by making a wall of “Hands” – when a parent joined, their child was given a paper hand to write their name and post on the school PTA Wall. All the kids wanted to see their “hand” on the wall. Other schools had pizza slices – the class with the most pizza slices won!
Step 6: Invite your School Staff to join

Make sure you send a flyer and a membership envelope to everyone who works at your school – principal, teachers, support staff, custodians. Invite them to be part of your PTA. Caution: Avoid coercing staff to join by withholding benefits such as classroom mini-grants. The mini-grants benefit the kids – not the teachers – and as a PTA, you want to help all kids.

- Some schools offer a discount to PTA staff to join.
- Another idea is to have a raffle for teacher supplies – members get extra raffle tickets.
- If you hold a Back to School breakfast or lunch for your teachers, tuck a PTA membership form inside each napkin … or place the napkin and flatware inside a membership envelope.
- Hold an opportunity drawing for teachers who join the PTA. Winners can receive gift cards or school supplies donated from local businesses or members.
- On the first day of school, give a flower, apple or small appreciation gift along with a handwritten invitation to join PTA on each teacher’s desk on the first day of school.
- Ask your principal to also personally invite the staff at a staff meeting.

Step 7: Forward your per capita dues to Council

Check your PTA box in the office regularly for returned membership envelopes. You must have members forwarded to Council by November 1 to remain in good standing. After that, submit membership monthly.

Step 8: Ready, Set, Remit

Win this new California State PTA Award by turning in at least 30 members to Council by Friday, October 1.

Step 9: Hand out Membership Cards

Each member should receive a membership card. The membership chair is responsible for filling out the cards and distributing them to members. Membership cards are provided to you at no cost. You begin the year with the number of cards based on last year’s membership.

Step 10: Keep your campaign going all year

Continue to ask parents to join. Continue to promote your PTA.

- Every time you have a PTA event, have membership envelopes on hand to hand out to people who are not yet members.
- Ask for PTA table at major school events.
- Include PTA membership materials in new student packets in the school office.
Membership cards – Q&A

**Does every member need a membership card?**
Yes. Each PTA member should receive a card; it is proof of membership. A membership card entitles its bearer to a ballot in an election. Applicants for PTA scholarships and grants must provide a copy of their membership card. A membership card is required to register for convention. Remember: **One member = one card. Do not fill in cards for “Mr. and Mrs. Jones” or “Jones Family.”**
PTA members are entitled to benefits of membership provided by PTA. The username and password needed to access a protected portion of the National PTA website are on the back of the membership card and change annually by November 1.

**How many cards will our PTA get?**
Each PTA will receive a supply of cards equal to the membership total of the previous year.

**Can we get additional cards?**
A PTA may request additional cards as needed – when membership numbers are equal to or exceed the number of cards already received and per capita dues have been submitted for those members.

**Is the “issue date” important?**
Yes. Only those who have been members for 30 days are entitled to make motions, debate, and vote at PTA meetings. A person must be a member for at least 30 days prior to being nominated for a PTA office.

**Why is the “expiration date” always October 31?**
The California State PTA membership year is July 1 to June 30. Our membership card expiration date is October 31, allowing a grace period for members to renew their membership. During this grace period, members are entitled to their full membership rights, including approval of the PTA’s budget and program at the summer or fall association meeting.

**How do I find the National PTA identification number?**
Each PTA has its own unique eight-digit National PTA ID number. This number (not your state ID number) should be included on the membership card. The number is on the cover of your PTA bylaws. Ask your district PTA if you do not know it.

**How can cards be filled in?**
Cards may be completed by hand, the PTA name stamped, or filled in using either *Just Between Friends*’ membership management application or any customized or independently developed card template. Cards are signed by the member upon receipt.
10 Steps to Membership Success

1. Make it Personal: ask Friends and Family.
Their membership supports the voice for your child and all children nationwide. Don’t be shy. Ask, ask, ask!

2. It's a Year Long Event!
Keep PTA envelopes in the front office in a convenient, accessible place and have them available at school events all year. Remember that new students enroll throughout the year.

3. It's a Group Effort.
Form a committee that will carry your school’s membership message so you have a broader opportunity for outreach in your school and community. Create new ways to spread your membership message throughout the year.

4. Distribute Cards.
Find a variety of ways to get cards into your members’ hands. This is a requirement that can benefit your members and assist in accountability. Create awards and or discounts for card carriers on your campus and in your community.

5. Count Your Students In.
Students are valuable resources as members and can take on an active role on your board. The potential contributions on your campus are endless!

6. Teachers are the "T" in PTA.
Take the time to focus on bringing teachers on board as active members with input. Engage them as critical components of your school programs.

7. Community Supporters.
Give local businesses a chance to show their support for children and education. Adopt a business, or simply reach out and invite them to join with a big thank you that they can display in their business.

8. Kindergarten parents…the future leadership for an elementary school PTA.
Attend the kindergarten round-up, ask for a minute on the agenda, and invite these new and enthusiastic parents to get involved! Be sure to suggest ways that they can help.

9. Invite school district leaders and school board members to trumpet the importance of PTA membership.
Their affiliation with PTAs in your community is mutually beneficial. Encourage them to share in public meetings the many reasons why PTA and parent involvement contribute to student success.

10. I joined PTA…did you?
That old-fashioned button we used to wear still echoes a compelling question. Consider wearing it at Back to School night and other school events and functions!
The ‘T’ in PTA Stands for Teachers!

Let's remember why we have a "T" in PTA. Teachers and staff are crucial partners in our children's success. Encouraging them to join PTA in a collaborative partnership between home and school should be a focus of your PTA and membership campaign.

Here are some ideas for getting teachers involved:

- Enlist the support of your principal. A principal's encouragement to join can go a long way.

- Arrange to provide a breakfast for teachers prior to the start of the school year. Use this breakfast as an opportunity to talk to teachers about the value and importance of joining your PTA.

- Include PTA materials in information packets given to teachers and staff at the start of each school year. Include information about the PTA’s continuing education grants for teachers, counselors and school nurses.

- Print out personal invitations asking teachers and staff to join and include membership envelopes. Remind them that for the cost of a few coffees they can support our national organization of more than 5 million members!

- Award teachers and staff with a party or lunch when 100 percent teacher and staff membership is reached.

- Request a bulletin board or showcase at your school to display current information about PTA activities.

- Use back-to-school nights as an opportunity to speak with both teachers and parents about the importance of supporting PTA. Prepare a short presentation. Be sure to have the permission of your principal.

Some other helpful ideas:

- The teachers and staff expect to be asked to join. If they expect it and you don't ask, they may feel that they are not needed or welcomed. Remember to ask.

- Get to know your teachers. Sometimes teachers or staff may be reluctant to join because of a prior negative experience with PTA. Apologize for whatever may have happened and talk to them about how PTA's work benefits not only the children but the teachers and the school as well.

- Parent Involvement is what PTA does best and it's the law. Remind teachers and staff that partnering with PTA helps them to fulfill the Parent Involvement mandate of No Child Left Behind.

- Remind teachers and staff that PTA is more than a local fundraising group for their school. It is an advocacy organization focused on student success!
How to Handle Membership Funds
Using the Cash Verification Form

The Cash Verification Form is used to count and record all money collected for any event. This would include collecting membership, a book fair or T-shirt sales, any program or event where money is collected, including donations.

Fill out the top portion indicating the event (membership, book fair, carnival, etc). Sometimes events are dual events, such as a book fair where membership is collected at the same time, with one payment.

Two people always count the money. One person must be a PTA Executive Board Officer or Committee Chairman. The other person will be a PTA member, who is assisting.

If membership is collected at the time of the event, itemize the membership collected and any donations made to your PTA in the box marked Membership Dues.

Donations can be recorded without someone purchasing a membership and will be recorded in the Membership Dues box accordingly.

Make a copy of the completed cash verification form for each person who counted cash and one copy to accompany the money. Seal the money in an envelope to be presented to the treasurer for deposit. If you have a Financial Secretary, that person will make the deposit.

A copy of the Cash Verification Form will be part of your Committee Report, for the event which has just taken place and you will report at the next Executive Board Meeting.

All membership dues (not belonging to the unit*) collected shall be forwarded to the Council PTA monthly. Membership for the California State PTA starts July 1, so membership can be forwarded for the school year starting in July and August. Any time a member joins throughout the year, membership is forwarded to Council, even if it is just one member.

Membership money not belonging to the unit* - "Membership dues not belonging to the unit" means the dues which are forwarded to Council, District, State and National PTA. Presently these dues are: Council - $0.50, District - $1.00, State - $2.00, National - $2.25

Your PTA will forward $5.75 to your Council PTA for each member.
CASH VERIFICATION FORM
(Membership, Fundraisers, Donations)

UNIT NAME

ACTIVITY ___________________________ DATE ___________________________

COINS

x 1¢ = __________________

x 5¢ = __________________

x 10¢ = __________________

x 25¢ = __________________

x 50¢ = __________________

x $1 = __________________

TOTAL $ __________________

CHECKS Attach adding machine tape of itemized checks.

# $ ______ # ______ $ ______

# $ ______ # ______ $ ______

# $ ______ # ______ $ ______

# $ ______ # ______ $ ______

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# $ ______ # ______ $ ______

# $ ______ # ______ $ ______

# $ ______ # ______ $ ______

# $ ______ # ______ $ ______

TOTAL $ __________________

CURRENCY

x $ 1 = __________________

x $ 5 = __________________

x $ 10 = __________________

x $ 20 = __________________

x $ 50 = __________________

x $100 = __________________

TOTAL $ __________________

TOTAL $ __________________

GRAND TOTAL $ __________________

Membership Dues

# ______ members @ $ ______ (dues) = $ ______ + donations = $ ______ Grand Total $ ______

FOR OFFICIAL USE ONLY

Signature __________________

Signature __________________

Signature __________________

Amount Received: $ ______

Signature __________________

Date __________________
Defining the Difference

The term “PTA” is commonly used to describe any parent group, and many parents, teachers, and administrators are unaware of the distinct differences between PTA and other parent organizations.

All parent groups are not the same
- PTA is a not-for-profit organization and the nation’s original and premier parent involvement group in schools.
- PTA has more than 23,000 local units and nearly 6 million members.
- PTA units are supported by a national and state structure that provides valuable information, resources, and training.
- PTA believes parents are more than fundraisers.
- PTA works with parents to advocate for proper funding, leadership, and instruction for all schools and school districts.
- Chartered PTA units are 501(c)(3) nonprofit organizations.
- Local PTAs are eligible for discounted insurance for events that are not covered by their schools.
- PTA provides a free data collection system.

PTA membership is open to everyone
- PTA is inclusive of all people who care about children and schools.
- PTA builds bridges between homes, schools, and communities to help children succeed academically and personally.

Local PTAs make their own decisions
- Local units select the priorities, programs, and activities that address the needs of their schools.
- There are no mandated programs from the national or state organization, though relevant programs, helpful resources, and a network of support are provided.

Relevant programs
PTA national programs are free, user-friendly, and created with leading experts on topics of importance to PTA members. These programs include
- Building Successful Partnerships—Presenters, programs, and materials that strengthen parent involvement.
- Parent Involvement Schools of Excellence Certification—A program that recognizes schools for successful parent involvement practices.
- Phoebe Apperson Hearst—National PTA Excellence in Education Partnership Award—An award that recognizes local PTAs for their collaboration with families, schools, and communities.

(continued on back)
Reflections Program—An annual program that allows youth to express themselves through the arts.

Three for Me—A volunteer program that encourages parents to volunteer three hours per year in their children’s schools.

The PTA national office also provides resources, workshops, and materials to support
- Back-to-School
- After-school programs
- PTA Teacher Appreciation Week
- PTA Take Your Family to School Week
- Student achievement
- Child nutrition and wellness
- Prevention of violence and bullying

Fundraising

PTA Fundraising Essentials, published annually, is filled with ideas and resources to help PTAs organize fundraising activities to support their initiatives.

Dues and benefits

PTA members pay minimal dues to support local, state, and national efforts to improve the education of all children. In return, members receive valuable resources, information, and training.

Benefits of affiliation for your local PTA include
- Discounts from corporate supporters on supplies and materials
- PTA Quick-Reference Guides on leading a PTA, membership, finances, and programs
- Reproducible brochures, marketing templates, public service advertisements, and PowerPoint presentations
- Our Children magazine
- Reproducible parent involvement newsletters, in English and Spanish

PTA Fundraising Essentials
- A Back-to-School kit with resources and materials to use throughout the year
- Tools to help implement local and national PTA programs
- The PTA Unit Achievement Award recognition program
- The annual PTA National Convention
- Resources from national partners and sponsors of PTA

Benefits of membership for individual members include
- Online resources, including select articles from Our Children magazine
- Electronic newsletters that keep members informed on current education, family, and legislative issues
- Special discounts and offers from national and local member benefits providers
- Online leadership training through e-learning courses
- Discounted rates for the PTA National Convention
- The Member-to-Member Network, connecting PTA members to members of Congress
- Additional benefits from the state PTA

A united national voice for children

Not all decisions affecting a child’s school happen at the local level, and the Mission of PTA is to address the educational and social needs of all children. For more than a century, PTA has been a driving force in national education policies and programs. Today, PTA continues to champion the importance of parent/family involvement, safe and nurturing environments, and proper funding, curriculum, and leadership in our public schools.

For a Spanish-language version of this document, go to www.pta.org.
<table>
<thead>
<tr>
<th>AUGUST</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
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<tr>
<td>Farmers Market</td>
<td>11am-3pm at MCHS</td>
<td>Freshmen Orientation 9am-12noon</td>
<td>Registration Seniors AM Juniors 12:30-3pm</td>
<td>Registration Sophomores 8am-2:30pm Lunch Break 11:30-12:30</td>
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<tr>
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<td>Make-up Registration</td>
<td>First Day of School Period 1 7:30am</td>
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<tr>
<td>Farmers Market</td>
<td>11am-3pm at MCHS</td>
<td>No School Labor Day</td>
<td>MCHS PTSA Assoc. Mtg. 6:30pm Gym Back-to-School Night</td>
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<tr>
<td>Farmers Market</td>
<td>11am-3pm at MCHS</td>
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</table>

**SEPTEMBER**

| 28              | 29     | 30      | 31        | 1        | 2      | 3        |
| Farmers Market  | 11am-3pm at MCHS | No School Labor Day | MCHS PTSA Assoc. Mtg. 6:30pm Gym Back-to-School Night |  |
| 4               | 5      | 6       | 7         | 8        | 9      | 10       |
| Farmers Market  | 11am-3pm at MCHS |  |

**SAMPLE**
Mt. Carmel High School PTSA Membership 2011-2012

The membership drive is the heart of the PTSA. Funds from this drive go to:
Education Advocacy ◦ Library Support ◦ Student Services ◦ Gifts to the School ◦ Senior Scholarships ◦ Grad Nite

<table>
<thead>
<tr>
<th>1. Student Membership</th>
<th>Qty</th>
<th>Cost</th>
<th>Total</th>
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<tr>
<td></td>
<td></td>
<td>$8.50</td>
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</tr>
<tr>
<td>2. MCHS Staff Membership</td>
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</tr>
<tr>
<td>3. Adult Membership</td>
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<td>$10.50</td>
<td></td>
</tr>
<tr>
<td>4. General Hassle-Free Donation (suggested amount $50)*</td>
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<tr>
<td>5. Grad Nite 2012 Donation (suggested amount $25)*</td>
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</table>

*Please make check payable to MCHS PTSA

Bring this completed form to registration (PTSA table) or drop it off at the MCHS office

NEW MCHS Members ONLY: to be eligible for voting at the first association meeting on September 6, 2011 form must be in the MCHS office by August 5, 2011 (9550 Carmel Mountain Rd., San Diego, CA 92129).

Additional forms available online at www.mtcarmelpts.org

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**Member(s) Information**

**Last Name**  **First Name**  **Student**  **MC Staff**  **Adult**

1.  
2.  
3.  
4.  

Mailing Address (Street, City, Zip Code) **

Family Phone**  Family Email Address**

☐ I give permission to enter my contact information into “Just Between Friends”, an email communication service operated in conjunction with National PTA – Secure and Privacy protected.

☐ Please check the box if you would like to be contacted with upcoming volunteer opportunities at MCHS.

**And remember...it’s GREAT to be a SUNDEVIL!**

For tax-deductible corporate donations/matching funds, contact Evi Frey at evi.frey@sbcglobal.net

*Tax-deductible  ** For PTSA use only
Parents

Did you know?
The top 3 things parents say PTSA does best:

PTSA

☆ Is effective in improving their children’s education
☆ Works to make schools safer for children
☆ Has a positive impact for all children, not just their own

Sample

Be part of the strongest advocate for every child!

Join our MCHS PTSA

Students

Do you want to be involved at your school?
Do you want leadership opportunities?
Do you want to serve your community?

Then...

Join our MCHS PTSA

MCHS PTSA needs your

☆ Talents
☆ Enthusiasm,
☆ Energy,
☆ Fresh ideas, and
☆ Focus on issues that affect yourself and your community
Programs and Events Sponsored by MCHS PTSA

Mt. Carmel
Certified Farmers Market
Sunday 11am-3pm
Buy Locally • Eat Healthy • Support Your Community

MT. CARMEL HIGH SCHOOL
MEDIA SALE
Books, CDs, DVDs, Books on Tape, VHS, etc.
Benefactor: Library at the Mount

Fall Sales Days: Thursday & Friday
Oct. 27-28 in room B5 from 7am-5pm

PTA REFLECTIONS
2011-2012 Theme: “Diversity means…”

CHARACTER COUNTS!
Caring • Responsibility • Citizenship
Respect • Trustworthiness • Fairness

Grad Nite
A Safe and Fun Venue for the
Senior Class to Celebrate the
Night of Their Graduation

Coffee
With the Principals

Adopt-A-Family
Community Concerns

Staff Appreciation Week

Senior Scholarships

http://www.powayusd.com/pusdmchs/ptsa/