

# Membership Q & A

## Where can one join PTA?

PTA is a membership association and people join a unit PTA each year by paying membership dues. Members at the unit level automatically are members of National PTA and California State PTA. If one has children in multiple schools, one may join the PTA at each school.

## What does 'per capita' mean?

“Per capita” means “per person” and generally refers to the portion of membership dues that does not belong to the unit PTA. The amount of membership dues is set by each unit (the amount is listed in each PTA’s bylaws) and includes the following:

<b>National PTA portion</b> -----	<b>\$1.75</b>
<b>California State PTA portion</b> -----	<b>\$1.25</b>
<b>District PTA portion</b> -----	<b>check bylaws</b>
<b>Council PTA (if in council)</b> -----	<b>check bylaws</b>
<b>Unit PTA portion</b> -----	<b>remainder</b>

Remember: The unit PTA can only keep and spend the unit portion; the rest belongs to the other levels of PTA and must be remitted through channels.

## Can we change the amount of our dues?

The actual per person dues amount is specified in the bylaws. In order for a PTA to change its dues amount, its bylaws must be revised and approved through channels and by the association.

Membership in PTA should be affordable to everyone so that everyone can afford to join. The membership campaign should not be a fundraising project. A good rule of thumb for membership dues is to collect an amount that will cover per capita for the constituent organizations – National PTA, California State PTA, district PTA and council PTA, if in council – and a small portion of each membership for the liability insurance premiums.

## Can we have 'levels' of membership?

No, there is only one level of PTA membership. All memberships are equal and all members have the same rights. The actual per person dues amount is specified in the bylaws and members must be allowed to join at that price. The membership campaign invitation should be for membership enrollment only.

## Can we ask for donations at the same time we ask people to join?

If the PTA wishes to solicit donations with levels of contribution, it is done as a separate project from the membership campaign. For example, a gold donor/patron could reflect a contribution of \$100; a silver donor/patron could be for \$50, etc. The details of the donation project shall be outlined in the standing rules and approved annually by the membership. Membership dues and donations to the PTA budget should be recorded separately.

**Membership dues and the contributions must be kept separate in all financial records and reports.** In fact, the amount of per capita that units keep and the amount that is forwarded through channels should also be separated out (“monies belonging to the unit” and “monies not belonging to the unit”) in monthly treasurer’s reports, budgets and annual financial reports. This also facilitates the reconciliation of memberships received and those forwarded.

### What about student memberships?

Students can be members of any PTA/PTSA as well as hold positions on the executive board. A PTA does not need to be a PTSA to have student members. Students help provide relevancy to the PTA while providing them with unique leadership and advocacy skills.

Membership dues for students are the same amount as for any member, as stated in the bylaws. If a unit PTA wishes to include a separate student member dues structure, the bylaws must be amended and forwarded to the California State PTA parliamentarian for approval. Student members’ per capita cannot be subsidized by the unit. Students, upon payment of membership dues, have all membership privileges and responsibilities.

### What about ‘family memberships’?

Each membership includes the payment of per capita dues and the privilege of one vote. California State PTA discourages group or family memberships because it can be unclear who qualifies as a voting member. PTAs with such memberships must spell out in their bylaws the number of members that constitutes a group or family, forward that number of per capita dues and give each voter a membership card. If a unit PTA wishes to include a family membership dues structure, the amended bylaws must be forwarded (through channels) to the California State PTA parliamentarian for approval.

#### **PTAs that offer a family membership must:**

- 1. Spell out in their bylaws the number of members that constitute a family.**
- 2. Forward that number of per capita dues.**
- 3. Provide each member an individual membership card in the member’s name.**
- 4. List the individual members by name on the association's membership list.**

### Must we use the PTA membership envelopes?

No, you can develop a flyer or another method of collecting membership money, but whatever recruitment form is used in your unit, it should allow for the collection of the member’s contact information (address, phone number and e-mail). Alphabetize and retain the original information until the next membership campaign begins. The association secretary receives a copy of the membership list. Check the *California State PTA Toolkit* for sample invitation letters.

### Do we need to keep a membership list?

Yes, every PTA needs to keep an updated list of members! (*California Corporation Code Section 6320 provides that every California nonprofit corporation – like the California State PTA – shall keep a record of its members.*) A list should include the dates of membership and contact information of current association members. It is recommended that PTAs keep their membership lists for a total of three years.

## Who should have the membership list?

A copy of the membership list shall be kept on file with the president, secretary, and membership chairman. The secretary must be able to verify who is eligible to vote during meetings. If no list is available, all those in attendance must be allowed to vote. The nominating committee should receive the list as a resource for considering members for PTA offices. The nominating committee must verify that those persons nominated are members and eligible for office. The membership list of the association shall be for the exclusive use of the association and shall not be available for distribution or purchase by any other organization or commercial entity.

## Must we distribute membership cards?

Absolutely! There are several good reasons why every member should receive a membership card:

- The card shows that dues have been paid.
- A membership card entitles the member to a voting ballot other at other levels of PTA.
- The “username” and “password” needed to access parts of the National PTA web site are on the back of the membership card and change every year.
- Convention voting delegates must show a membership card when registering to attend convention. PTA members can register at the PTA rate using their membership card.
- Applicants for PTA scholarships and grants must provide a copy of their membership cards.

Each member should get his/her own card; no card should say “Mr. and Mrs. Smith” or “Smith family.”

## Why is the ‘date issued’ important?

A person must be a member for at least 30 days before being nominated for an office. Also, only those persons who have been members for 30 days can make motions, debate and vote.

## Why is the expiration date always October 31?

The card expiration date should be October 31 of the following school year so that members who join during the current school year are eligible to vote on PTA’s program and budget the following September/October if they have not yet had an opportunity to re-join. This date has also been designated for uniformity across the state. The membership year for California State PTA is July 1 to June 30, but members are given until October 31 to re-join.

## What is the California ‘membership year’?

The California State PTA membership year begins on July 1 and ends on June 30. An individual joining during one membership year – between July 1 and June 30 – needs to re-join in the new year beginning on July 1. Those who become members of an established PTA unit after March 31 need to join again at the next annual enrollment to maintain their membership. The “first required per capita remittance” is based on this membership year and the Early Bird and Chairman’s Club awards are based on per capita received by their respective due dates during this membership year.

## When do 'charter members' in a new PTA need to rejoin?

Charter members who pay dues at an organizational meeting held between April 1 and June 30 are entitled to a new membership card at the time of the next annual enrollment without further payment of dues, upon proof of their charter membership. Although *charter members* of a new unit organized between April 1 and June 30 are not required to rejoin the PTA for one year (*Toolkit 3.2.5*), the PTA is expected to run a membership drive in the new year and forward *additional memberships* once the new membership year begins. Those charter members are given membership cards at the organization meeting and should be given membership cards for the subsequent year when they become available.



## Can we sign up next year's members before the new year starts?

**Many schools – from preschools to high schools – wish to sign up PTA members in the spring when student registrations and/or parent orientations take place for the upcoming school year.** Often the PTA recognizes that some form of contact in the spring may be one of the few times they will have direct access to a large percentage of the incoming family members and the PTA wishes to offer them the opportunity to join the PTA for the following year. This might include the following:

1. A packet of materials mailed in preparation for registration.
2. An actual registration event at the school.
3. A parent orientation for incoming parents.

Since, in these cases, the prospective members are joining for the next/upcoming school year, their per capita should be held separately in a line item of the budget earmarked for that purpose, and only forwarded through channels from the PTA unit on June 30 – just before the new membership year begins. This results in those membership monies going through channels and being credited to the PTA unit for the new membership year but the unit PTA's year-end audit would find that all membership monies collected had been forwarded. **Note: This holding of membership monies can be done by a PTA unit. However, this would not be acceptable practice for a council PTA or district PTA.**

In this case, membership cards can be issued whenever they become available but their effective date of membership would be July 1. Care needs to be taken to keep the monies separate and make note on membership lists for which year the person is joining.

## If un-remitted membership per capita is discovered during the year or as part of an audit, must we still forward that money through channels?

Since un-remitted funds are generally per capita and “monies not belonging to the unit”, that money must be forwarded even though it is late and even if the reporting period or membership year has ended.

## How can a PTA avoid this situation?

All membership dues received at any level of PTA should be recorded in every financial report (treasurer's report, financial year end reports, budget-to-actual reports throughout the year) and should be separated into “monies belonging to the unit” and “monies not belonging to the unit.”

The membership vice president/chairman should report out at every meeting and reconcile the membership records with the records of the financial officers on a monthly basis.