

Signing up next year's members before the new membership year starts

PTA membership in the spring

The California State PTA membership year begins on July 1 and ends on June 30. Per *Toolkit 3.2.1*, an individual joining during one membership year – between July 1 and June 30 – needs to rejoin in the new year, after July 1. The “first required per capita remittance” is based on this membership year and the awards are based on per capita received by their respective deadlines during this membership year.

*Often unique questions arise.
Here are some guidelines to deal with real-life situations that may come up.*

Officers for the upcoming year might be identified from a group that is not yet part of the PTA. For example, it is excellent practice for the nominating committee of a PTA to seek candidates for office from feeder schools. If the PTA is recruiting officers from the incoming parent or student group, Article V, Section 6 of Bylaws for Local PTA/PTSA Units reads:

The privilege of nomination and election to office for the ensuing year in this association may be extended to individuals who are already members in any PTA or PTSA unit in good standing and who, upon nomination to office, pay dues to this association in order to qualify as a member at the time of assuming office.

As a result, the candidate is required to join the PTA that is proposing the candidate for office. The per capita would be forwarded immediately through channels to the council, district, state and national associations. The candidate becomes a voting member of the association 30 days after joining the PTA and should be issued a card immediately.

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 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 parent orientation for incoming parents;
2. registration at the school; and
3. a packet of materials mailed in preparation for registration.

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 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.**

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 new 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.