FOURTH DISTRICT PTA
SPRING TRAINING
JUNE 1, 2019

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Course Learning Objectives

- Explain why membership is so important to PTA.
- Understanding your role as a membership chairman.
- How to set goals and create a membership marketing plan.
- Recognize the diverse nature of your school community and include ways to have a representative cross section of the community into your membership plans.
- Access tools and resources to help you succeed including awards, perks and incentives.
**Why is Membership So Important?**

- *PTA is a Membership Funded Non-Profit Organization*
- *Without our members, there is no PTA*
- *Membership + Advocacy = SUCCESS*
- *PTA Operates on both the Macro and Micro Level*

[www.capta.org](http://www.capta.org)
The Five “Levels” of PTA

National
State
Districts
Councils
Units
Responsibilities of the Membership Chairman

- Set Membership Goals
- Create and Implement a Membership Plan
- Promote Membership Throughout the Year
- Help Set the Membership Budget
- Collect Dues and Verify “Per Capita” is Remitted
- Create a Membership List
- Distribute Membership Cards
MEMBERSHIP BASICS

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Goal Setting

- Where are you?
- Where do you want to go?
- What strategies will you use to get there?
Goal Setting

Where are you?

- Know your past membership numbers
- Keep track of your members
Goal Setting

Where do you want to go?

- **Set number goals for each month**
- **Set goals for target groups**
  - Parents and Family members
  - Teachers
  - Students
- **Check against your goal**

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**Parent Mindset**

- Parents’ biggest problem is lack of time.
- Working parents often feel guilty that they don’t spend enough time on their children’s education.
- Parent sphere of interest is how the school is serving their child.
- Primary point of contact with the school is their child’s teacher.
- Parents are concerned about their finances – current and future.
- Additionally, immigrant parents do not know what is expected of them in terms of involvement/participation; they may feel intimidated.
PERCEPTIONS OF PTA

▪ Parents’ image and perceived value of PTA is completely based on the people, programs and tangible benefits they see at their own school.

▪ Local Leaders are PTA leaders.

▪ Awareness of State/National PTA is extremely limited.
Why Parents Don’t Join PTA

- Don’t want to be forced to volunteer.
- Don’t want to be obligated to attend meetings.
- Don’t want to be asked to take on a task.
Most Effective Messages
Top three identified

- Don’t want to be forced to volunteer.

- Don’t want to be obligated to attend meetings.

- Don’t want to be asked to take on a task.
MARKET AND PROMOTE THE VALUE OF PTA

- Add voices to the PTA advocacy voice.
- Understand what PTA has accomplished and continues to champion.
- Assess and address the reasons people don’t join.
- Encourage current members to rejoin.
Your Membership Plan = Inclusiveness
Reach out to all audiences and ask them to join PTA

- Create an inviting environment for all
- Consider cultures, languages and religious holidays
- Develop and maintain respectful relationships
- Make sure your PTA represents your community
- Avoid clique-like behavior
- Consider who is missing – men, military, grandparents
SUCCESSFUL MEMBERSHIP PLANS

- Start early and use multiple touch points.
- Use teachers as key influencers and campaign drivers.
- Utilize one-on-one outreach by PTA board members and parents.
- Utilize personal outreach by bilingual board members and/or PTA parents to non-English speaking parents.
- Reach out to parents of special needs students.
- Reach out to students.
- Reach out to past PTA members.
- Include other school groups (boosters, ASB, sports teams, etc.).
- Track and reports membership progress.
- Target those who have not signed up yet.
- Publicly post progress – citing specific classrooms and even specific teachers.
- Organize events, contests, prizes and incentives.

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“The Elevator Pitch”

HOW EXCITING!! PLEASE TELL ME MORE!!
Join PTA because it helps the school and it helps all the children. It allows you to be involved in your child’s education. It also keeps you informed with what is going on at the school. Without PTA, our kids would not have art, field trips, or our yearly carnival.
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Promoting Membership

Why PTA?
Who can join PTA?

Any individual who subscribes to the purposes and basic policies of PTA becomes a member upon payment of dues to a PTA or PTSA unit.
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Basic Responsibilities

Ways to Join

- Have a systematic way for people to join (envelopes or other)
PTA Electronic Membership

Multiple memberships and donations

Options for next steps, social sharing, info.

True electronic membership card

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Why?

The way we:

• Join groups has changed
• Pay and receive money has changed
• Communicate has changed
• Collect information has changed
Unit Leader Dashboard

Tulita PTA
Redondo Beach, CA

521
ACTIVE MEMBERS

$5,814
REVENUE YTD

$2,837
DONATIONS YTD

437
ONLINE MEMBERS

MEMBERS BY TYPE
Parent/Guardians 369
Students 111
Teachers 19
Other 8
Grandparents 6

REACH BY CHANNEL
Email 312
Phone 55
Facebook 43
Postal 9

MEMBER BENCHMARKS
Auto-renewing 40%
Paying Online 84%
Donating 7%

Grow Your Membership

550 Member Goal
You are 94% to your goal of 550 members. You need 29 new members to reach your goal.

Promotion Checklist
Simple steps to promote your association using web, social media, email and more.

Add a Join Now link to your Facebook Page
Use your Facebook Page to drive memberships.

Register Offline Members
Manually invite members who signed up offline.

More Promotion Tools

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Reports

Tulita PTA
Redondo Beach, CA

Finance & Accounting

- Cash Flow [PREVIEW]
  All credits and debits to your account.
- Donors & Donations [PREVIEW]
  Donors and donations processed by TOTEM.
- Online Performance [PREVIEW]
  Income statement and key metrics for your association.
- Payments [PREVIEW]
  All payments
- Payouts
  Payouts deposited to your bank account to date.
- Transfers Summary
  Income from memberships, donations and other transactions.

Members

- Member Email List
  Email list of members who have opted-in to receive email from your association.
- Member List
  Complete member list including contact information and membership status.

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Electronic Membership Highlights

Easy and fast login using Facebook or email

Geolocation and search to find the right school

Simple forms, multiple schools all in one step

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Flow of Money

Electronic Membership Flow

- Member
  - $1 convenience fee
  - Simultaneous transfer to all levels

  - Unit
  - Council
  - District
  - CA State PTA
  - National PTA

Regular cash/check Membership Flow

- Member
  - Unit
  - Council
  - District

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MEMBERSHIP BASICS

Remit Dues

- Help keep financial records in good shape
- Maintain “good standing” status
- Forward the portion of dues to council (or district if out-of-council)
- Keep a current and accurate membership list

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- *Distribute Membership Cards*
Membership Cards:

Membership cards are provided by California State PTA and distributed through PTA channels. Each member should receive an official membership card from the unit PTA upon payment of dues. The same PTA membership card is used by all PTAs.
Awards, Incentives & Perks

National Contests and Incentives
State Contests and Incentives
District Contests
Council Contests
Unit Contests and Local Perks

Strategies For Success

www.capta.org
RESOURCES AND TOOLS

- **California State PTA**
  www.capta.org
  
  *Toolkit*, membership marketing tools and past issues of “Membership Monday”

- **National PTA**
  www.pta.org
Idea Exchange
Membership Support

Jeff Price
CAPTA Membership Services Comm.
National PTA Strategic Outreach Comm.
jprice@capta.org
(562) 208-1741

Please remember that YOU ARE NOT ALONE!! We are all here to help you!!
Questions?
THANK YOU FOR ATTENDING!