

MCCPTA

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**Montgomery County Council of
Parent Teacher Associations**

**MEMBERSHIP
GUIDEBOOK**

Revised: June 2015

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MCCPTA Office Hours
9:00 am - 2:00 p.m. Monday - Thursday (School Year)
10 am - 12 pm Tuesday and Thursday (Summer)

THE PURPOSES OF PTA

The Purposes of MCCPTA, and those of the National PTA, Maryland PTA, and local PTAs are:

- To promote the welfare of children and youth in home, school, community, and place of worship.
- To raise the standards of home life.
- To secure adequate laws for the care and protection of children and youth.
- To bring into closer relation the home and the school, that parents and teachers may cooperate intelligently in the education of children and youth.
- To develop between educators and the general public such united effort as will secure for all children and youth the highest advantages in physical, mental, social, and spiritual education.

THE MISSION OF PTA

To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Useful Contacts

MCCPTA	www.mccpta.org
MCCPTA Office	301-208-0111
MCCPTA Office (FAX)	301-208-2003
Maryland PTA	www.mdpta.org
Maryland PTA (Glen Burnie)	1-800-707-7972 410-760-6221
Maryland PTA (Glen Burnie) (FAX)	410-760-6344
National PTA	www.pta.org

MCCPTA: PTA in Montgomery County

Founded in 1944, MCCPTA has grown from 15 PTAs to 192 local PTAs and PTSAs. This growth reflects the vital role PTAs have had - individually and in council – in meeting the needs of our children and families.

Local PTA Presidents and their MCCPTA Delegates serve as a link between the Montgomery County Council of PTAs and the local PTA by participating in MCCPTA Delegates Assemblies, working with their Cluster Coordinators and Area Vice Presidents, and sharing information between the two organizations. Delegates will have information about what is happening across the school system to share with the members of their local PTA and will bring the perspective of their local PTA to the discussions at the county level.

General MCCPTA meetings, Delegates Assemblies, normally are held on the fourth Tuesday of the month during the school year at 7:30 pm at Carver Educational Services Center in Rockville and are open to all PTA members. The privileges of introducing motions, debating, and voting are limited to the voting body, which consists of the delegates from local PTAs (the president, or alternate, and two accredited delegates) and the members of the MCCPTA Board of Directors (the officers, area vice presidents, cluster coordinators, and committee chairs). The monthly meetings provide an opportunity for delegates to present ideas, debate issues, become better informed, make personal contacts with other PTA leaders, and vote on MCCPTA business.

Area Vice Presidents and Cluster Coordinators will also coordinate meetings with their local respective PTAs to develop the relationship between the PTAs and discuss issues of concern across PTAs.

MCCPTA Presents!, special informational programs, usually are held from 6:30-7:30 pm on the fourth Tuesday of the month prior to the Delegates Assembly. This program is open to the public and is later broadcast on MCPS-TV.

Timetable for Growing Membership

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|----------------------------|--|
| July - August | <ul style="list-style-type: none"> ▪ Board sets membership goals ▪ Prepare summer PTA membership mailing |
| August | <ul style="list-style-type: none"> ▪ Send membership mailing to ALL families ▪ Arrange with Principal an opportunity to solicit teacher/staff members ▪ Organize volunteers to solicit PTA membership at Back-to-School Night and school events ▪ Coordinate Back-to-School Night plans with principal |
| September | <ul style="list-style-type: none"> ▪ Use Back-to-School Night, emails, to solicit membership ▪ Keep track of membership progress and opportunities ▪ Find additional ways to solicit teacher/staff membership ▪ Attend MCCPTA Fall Leadership Training |
| October | <ul style="list-style-type: none"> ▪ Assess membership drive: Who has become a member? Who is missing? ▪ Prepare a flyer/second mailing for families who have not yet joined PTA; send it home by mid-month ▪ Remit Dues Payment to Maryland PTA and to MCCPTA for PTA memberships sold to date ▪ Have Treasurer and Membership Chair/VP compare records ▪ Ensure Board members and chairs have paid dues |
| November – February | <ul style="list-style-type: none"> ▪ Remit Dues Payment to Maryland PTA and to MCCPTA (monthly) ▪ Have Treasurer and Membership Chair/VP coordinate monthly ▪ Continue to solicit memberships at PTA and school events |
| March | <ul style="list-style-type: none"> ▪ Remit Dues Payment to Maryland PTA and to MCCPTA ▪ March 31 is dues deadline for PTA Membership Awards ▪ Return all unused cards to Maryland PTA by the 15th |
| May-June | <ul style="list-style-type: none"> ▪ Assess your PTA's membership performance ▪ Prepare recommendations for the incoming Board ▪ Remit Late Dues Payment to Maryland PTA and MCCPTA for PTA memberships sold after March 31 ▪ Attend MCCPTA Spring Leadership Training |

Why Join PTA?

The PTA and National PTA are membership organizations and growing membership is important. Membership provides the resources - talent, time, ideas, volunteers, and funds - to benefit the children of our schools.

People join to show support of the work done locally and collectively to help children, families, and schools, and when they understand the benefits to themselves and/or the school community. The work the local PTA does must be relevant to the community.

The Membership Chair ensures that the PTA defines the benefits of membership and communicates that message to the community.

Do the PTA leaders and members answer “yes” to these questions?

- Do you believe every parent and guardian in your community gains by being part of your local organization?
- Does your community need a strong collective voice to advocate for the needs of the students and the school and a fully representative PTA/PTSA would provide that voice?
- Do you need those members’ contributions, either financial from their dues payments or their volunteer time and expertise?
- Does your PTA/PTSA provide programs and events that benefit your students and community that would not happen if they were not organized by your PTA/PTSA?
- Do you know that parental involvement is key to the successful education of a child and you see PTA as the means to help ensure student success?
- Do you believe in student membership in PTSA?
- Is there something else that makes you believe every adult in your school should be a PTA member?

These are the reasons why PTA membership is important. Discuss these with the Board. Select the top three to five. Come up with a unified vision of the PTA’s goals and the most important benefits to the students and school community. Make sure the majority of the community would embrace those reasons.

Make it the goal of the PTA, and the Membership Committee, particularly, to ask every parent, every staff member, and, for PTSAs, every student to join the PTA and tell them why membership matters. Then, even if they don’t join, they will more fully understand just what PTA does for their school, their children, and them.

Share the benefits and purpose of the PTA:

- Put them in the summer mailing, as part of a welcome letter, or as a standalone flyer.
- Post them up on the website homepage.
- Have the PTA/PTSA president and principal say them at Back-to-School Night.
- Keep those reasons in front of the school community all year long.
- Have an “elevator pitch” ready – be able to tell someone in 30 seconds why the PTA needs them to be part of the organization.
- Put those reasons on display. Spell them out on a PTA bulletin board, in a PowerPoint, or in a slideshow. Play them on monitors or TVs in the school—hallways or classrooms—when parents gather, for Back-to-School Night or other parent assemblies and school events.

Your Community, Your Board, Your Membership Strategy

The PTA/PTSA membership drive should be a reflection of the community and should follow guidelines and goals established by the PTA Board in line with current bylaws. Start planning in July and wrap up the drive by mid-March, although members can continue to join for the remainder of the school year.

The membership strategy should include:

- **Numeric targets.** How much membership growth is achievable? Look at the past year. Consider what percentage of families and staff joined in the past. Is there room for growth? At a minimum, a local PTA must have 25 members to remain a unit in good standing.
- **Inclusion goals.** Who generally has joined the PTA? Who hasn't? Are specific groups under-represented? Devise a plan to reach them.
- **Types of membership.** PTA is an individual member association, which means that the organization is an association of individuals who voluntarily join to support the work of the PTA. Therefore, “membership” must be defined as *one member = one card = one vote*. If the PTA offers family membership, explicitly define how many voting members are included. “Family” membership could include, for example, two adults, or, in the case of a PTSA, a student and an adult, or even two adults and a student. Such memberships would require a specific number of membership cards, dues must be paid for the same number to Maryland PTA and MCCPTA, and those individuals' names would be listed on the membership roster.

- **Student PTSA members.** Middle and high schools should have a membership form or forms that encourage and enable students to join, with their parents or without. Include in your membership plans a strategy to get students to join and participate.

Membership Dues & Cards

Dues Payments

Each local PTA must make dues payments to MCCPTA and Maryland PTA in order to remain in good standing each year; otherwise, the PTA will not receive National PTA material or be able to participate in programs such as Reflections. Payment of dues is required to receive credential cards for the Maryland PTA annual convention. In addition, if a PTA is no longer in good standing, Maryland PTA is required to notify the IRS that the PTA is no longer covered by the tax-exempt status conferred by being a PTA in Maryland. Collect memberships ONLY for the current school year.

2015-16 Dues (per member - parent, teacher, or student)

- MCCPTA: \$1.00
- Maryland PTA: \$2.00
- National PTA: \$2.25

MCCPTA (County):

- Make checks payable to “MCCPTA” and send with the dues voucher to the MCCPTA office (see cover for address).
- A copy of the "MCCPTA Dues" voucher is located in the back of this Guidebook and on the MCCPTA website on all membership-related pages.
- The voucher form and your PTA’s checks should be sent to the MCCPTA office on a monthly basis. PTAs should make a dues payment to MCCPTA at the same time the PTA is making payment to Maryland PTA.
- MCCPTA will distribute MCCPTA delegate voting cards to the president when the first dues to MCCPTA are received.

State/National:

- State and National PTA annual dues are paid together to Maryland PTA.
- Make checks payable to Maryland PTA and send to 5 Central Avenue, Glen Burnie, MD, 21061
- Maryland PTA sends membership cards based on the previous year and will invoice each local PTA monthly.

- Remember to pay Maryland PTA only for the amount of memberships sold during that month.
- Return any unused membership cards to Maryland PTA by March 15th.
- There are no refunds for overpayment; do not pay the entire invoice unless and until all membership cards have been sold.
- If additional cards are needed, send a check to Maryland PTA with the invoice requesting additional membership cards.

Membership Cards

Membership cards are issued by Maryland PTA directly to each local PTA or PTSA on behalf of National PTA for a specific fiscal year; the number of cards initially usually sent is based on the previous year's membership.

Complete the following on each card; cards change annually but this basic information is always necessary:

- National PTA ID number, that number is available from the Maryland PTA officer; and
- Local Unit (school) name.

Members join ALL levels of PTA; each local PTA/PTSA has an obligation to distribute PTA membership cards to each member, each year.

- Cards should include the name of the individual PT(S)A member. Again, there are no "family" or "parent or guardian cards". Membership cards are good for one individual for the current school year.
- Membership in one local PTA does not constitute privileges in any other local PTA or PTSA.
- Membership in a PTA is required for the privilege of voting, and of holding an office in that local and/or in the county, Maryland or National PTA.
- **ALL damaged, invalid, or unused cards must be returned to the Maryland PTA office no later than March 15; they can be returned with the monthly dues payment. Local PTAs will have to pay for any cards not returned by that time.**

For additional membership cards:

- Put the request on the monthly invoice received from Maryland PTA;
- Maryland PTA will not issue additional cards until the unit has paid for at least 75% of the cards originally issued.

Pricing Local PTA Membership Dues

Each individual, upon payment of dues, joins the local PTA, MCCPTA, Maryland PTA, and National PTA. The local board of directors sets the PTA dues, which should cover the dues for the larger organizations.

So what should the PTA charge on top of the dues the local will send to Maryland PTA and MCCPTA? Know the community. Know the membership goals. Know the funding needs and methods.

- What has the PTA/PTSA historically charged? If that amount is working, maintain that amount.
- If membership is low, do not automatically decrease the dues amount. Lowering the cost will not necessarily achieve this goal. Instead, reconsider the reasons of “why one should join the PTA.”
- If the PTA does not seek to raise operating funds through membership or the community is not in a position to pay more than required costs, consider making the dues equal to the required county, state, and national dues, making PTA affordable to many.
- If the PTA does want to raise funds, look at the budget and determine how much can and should come from membership dues. Let the potential members know what PTA dues pay for at the school.

Contribution Paperwork

A federal law that became effective on January 1, 1994, affects PTAs, which receive charitable donations. Since PTAs in Maryland, by virtue of their IRS 501(c)(3) status, are charitable organizations, gifts to PTAs are tax-deductible for the donors. **The law requires that the charity (the PTA) send a written receipt to a donor for any charitable contribution of \$250 or more.** Thus, the taxpayer may no longer rely solely on a cancelled check to substantiate such a cash contribution, and the taxpayer's deduction may be disallowed in an audit without such documentation. In general, the \$250 threshold applies to each donation, not to the sum of several donations made by the same donor at different times. The receipt must be sent by the charity to the donor, not to the IRS. There is no requirement for the charity (the PTA) to report the gift to the IRS. There is also no prescribed format for the written acknowledgment of the gift, except that the acknowledgment should be sufficient to substantiate the amount of the contribution.

Charities, such as PTAs, which fail to comply with the provisions of this law, are subject to financial penalties by the IRS. For more information on this law, see IRS Publication 1771 (Charitable Contributions - Substantiation and Disclosure Requirements) or Sections 6701 and 6115 of the IRS Code.

Charitable Contribution Guideline

If a donation is \$75.00 or more, then issue a contribution receipt – regardless of the value of the goods exchanged for the donation. The time expended writing receipts will certainly be less than any penalty the IRS may impose! Sometimes a W-9 form is requested for a donation. This can be pulled from the IRS website, and should include PTA EIN# and name of the individual/organization and address.

Summer (Membership) Mailings

A summer mailing is the opportunity to reach EVERY parent or guardian of a child at the school. **This is an essential step to strong membership.**

A standalone PTA summer mailing should include a welcome letter that states the top 3-5 reasons to support and join the PTA, a membership form, and a key information sheet (calendar of PTA events, contact information for PTA leaders, website address and other communications tools). If there's space, add a volunteer opportunities sheet.

If the mailing will be included in the school's summer mailing or shared with another school-group (such as a Booster club), the PTA may be limited to one or two pages. Be sure to include a membership form and/or information on how to join the PTA.

To Go Green or Not To Go Green? Should your PTA/PTSA go green, that is, save paper and seek members via online communications only? It's recommended that PTAs continue to make paper membership forms available in order to grow membership that includes each and every member of the community. Not all families are connected to the internet. And potential members in even the most connected communities respond to mail and flyers.

Bulk Mailing Permits PTAs may apply for a bulk mailing postal permit, which can save substantial money. This permit can be used when mailing 200 pieces or 50 pounds of like mail at one time. A permit costs \$150.00 per year plus an initial application fee. Contact USPS for an application form and other information. If the post office requests a copy of the IRS tax exemption ruling for Maryland PTAs, it can be obtained from the Maryland PTA treasurer. Maryland PTA checks that the local is in good standing and then issues the tax determination letter and a letter indicating the PTA is in good standing.

A Back-to-School packet is an alternative if the PTA doesn't do a summer mailing, especially for an elementary school PTA. Make it bright, to stand out amongst all the other back-to-school forms. Make it informative and be sure to include a membership form.

Getting Ready for Back-to-School Events

While the membership drive runs all year, **Back-to-School time is the high season for PTA membership.** Parents and staff will be excited about PTA if leaders share their enthusiasm and communicate what the PT(S)A has planned to benefit the children and school over the coming year.

Be ready to recruit members at every PTA and school event from the first open house at least through November. At each and every event, plan to have a lively, welcoming PTA membership table, ideally staffed with leaders and members of the PTA who represent the diversity of the community. Be prepared:

- Have an “elevator pitch” ready – a short, quick statement about joining PTA
- Have membership forms, change, and a current membership list.
- Make the PTA table stand out. Have balloons in school’s colors. (PTA logo balloons are available at the Maryland and National PTA Store.)
- Recruit current and past members of the board to greet parents. This is the time to get them out to introduce themselves to parents and staff
- Have displays of what the PTA does....tri-folds, a laptop with the website or slide presentation highlighting your efforts.
- Ask for 2-3 minutes for PTA during Back-to-School Night whether it is over the intercom or at an assembly.
- Play a role in the assemblies and/or messages that are conveyed at these events. Ask the Principal to remind parents of the importance of PTA membership and parent involvement.
- Place PTA membership forms in the school where handouts or flyers are kept available to the community

When parents/staff say “no” to PTA membership. Don’t take it personally. But don’t take it without hesitation. Ask “why not?” Listen. Be prepared to respond (borrowed from National PTA’s Membership Guide):

- “I don’t have the time!” PTA RESPONSE: “It only takes a moment to join. It’s not the amount of time you can contribute that’s most important, but rather your commitment to help PTA make a difference in the lives of children.” OR “You don’t have to be a volunteer to be a member.”
- “I don’t agree with a lot of the PTA positions!” PTA RESPONSE: “The only way to avoid disagreement would be to adopt a ‘do-nothing’ policy. As a grassroots association, our policies are determined by a democratic process. We welcome your involvement in this effort. It is through members like you that our direction is determined.”
- “Your organization doesn’t really do anything!” PTA RESPONSE: “I cannot speak for what may have happened in previous years, but let me bring you up-to-date on what we are doing

now...” OR “As you see, we are a very active group, doing many things that benefit all our children. We need time, funds, and good will from people like you to keep it happening. There is so much for us to do, but we need your support. Join us and help us do even more.”

Membership after Back-to-School Night

While the PT(S)A membership drive is in high gear from August through October, there are still many members to be added after Back-to-School fever has ebbed. November through January is a great time to keep growing the PTA/PTSAs. Here are a few tips:

- **New Families.** Get a list from the school of families who enrolled AFTER the start of the school year. Make a personal phone call or send them a welcome letter with a membership form. Invite them to upcoming meetings and events and tell them all that the PTA is doing for their child and that their support is vital.
- **Directories.** If this is part of PTA membership dues, remind families of this useful benefit.
- **Not-Yet-Members.** Create a list of the parents who have NOT yet joined the PTA and send these parents notes. Divide the list amongst the officers and committee chairs and make the notes personal and relate it to their child or their interests.

MCCPTA Membership Awards

MCCPTA annually recognizes local PTA/PTSAs that are building and sustaining membership and engagement with three categories of awards. Award winners will be announced at the Presidents and Principals Dinner, generally held in May. Winners also will receive certificates. Membership totals for the current year are based on MCCPTA dues paid and received as of March 31. Membership for the previous year—used to calculate growth—is based on total dues received by MCCPTA for that fiscal year (July 1 – June 30).

- **GROW IT!** These awards will recognize PTA/PTSAs for their year-on-year growth in percentage terms.
- **BUILD AND SUSTAIN IT!** These awards will be given to the three PTA/PTSAs from each school category--elementary, middle, high, and special school--that have the largest memberships in absolute terms.
- **ENGAGE IT!** These awards will be given to the PTA/PTSA from each school category--elementary, middle, high, and special school--that has the greatest PTA member to student number ratio. That ratio serves as a proxy for community involvement.

SAMPLE CHARITABLE CONTRIBUTIONS RECEIPT

Required for Contributions over \$250.00 and over

Donor Receives No Goods or Services

This acknowledges receipts of the following described property from you as a charitable contribution made on _____, 20__ to the _____ PT(S)A:

\$ _____ Cash Contribution

We have not provided you with any goods or services in exchange for this contribution.

Please retain this document for your records. It is an important document necessary for any available federal income tax deduction for this contribution.

President

Date

Please note that more information for building PTA membership is provided by National PTA and Maryland PTA. The National (www.pta.org) and Maryland (www.mdpta.org) PTA websites include additional information on growing membership, as well as on the state awards programs. The Members Only sections of those websites can be accessed by using the password found on the back of your PTA membership card.

MCCPTA Dues Form Sample

This form is available at www.mccpta.org on every page that has membership-related information. PTAs may also copy this page and use the form below. After completing the form, return the bottom portion to the MCCPTA office, 12900 Middlebrook Road, 3rd Floor, Germantown, MD 20874 through US mail or through the Pony mail system to MCCPTA at URSC, 3rd Floor, Germantown. Keep the top portion for your records. **It is strongly recommended that PTAs submit payment to MCCPTA when payment is submitted to Maryland PTA. This practice will ensure consistency in membership records between MCCPTA and Maryland PTA.**

MCCPTA Dues Payments 2015 - 2016			
Local PTA Receipt - Keep this portion for your records			
Name of PTA: _____		Level: <input type="checkbox"/> Elem <input type="checkbox"/> Middle <input type="checkbox"/> High	
Number of Members: Parents _____	Students _____	Teachers _____	Total _____
Amount Remitted (\$1.00 per member): \$ _____		Check #: _____	
PTA Treasurer: _____		Phone Number: _____	
<input type="checkbox"/> Initial Payment <input type="checkbox"/> Additional Payment			

MCCPTA Dues Payments 2015 - 2016	
Remit this portion to MCCPTA	
Name of PTA: _____ Level: <input type="checkbox"/> Elem <input type="checkbox"/> Middle <input type="checkbox"/> High	
Number of Members: Parents _____	Students _____ Teachers _____ Total _____
Amount Remitted (\$1.00 per member): \$ _____ Check #: _____	
PTA Treasurer: _____ Phone Number: _____	
For MCCPTA Office Use Only:	
<input type="checkbox"/> Initial Payment <input type="checkbox"/> Additional Payment _____	Date Rcvd: _____