**2020-2021 MCCPTA Membership & Engagement Committee**

**End of Year Report**

**Committee: Membership**

Chair: Carrie Palsson

**Other Members:**

Tracie Potts, Vice Chair of Engagement.

**Membership Number as of June 2, 2021:**  **23,228**

MCCPTA had a membership retention rate of 57% compared to the National PTA membership retention rate of 54%. We will likely get more membership dues paid throughout the summer as we always do. This past year we received payments for 1,321 members from the previous school year.

**We are missing payments from 39 units. Please see list at end of this report.**

**We also had 10 units pay for less than the required 25 members. Please see list at end of this report.**

**A Year of Challenges**

In an unprecedented year that challenged everyone to think creatively, PTAs in Maryland were hit with more challenges than anyone should have to endure. The pandemic, of course, was first in everyone’s mind but the challenges created by the Maryland PTA leaders created so much confusion, distrust, apathy, and anger that it is amazing any local unit was able to function at all. Kudos to all local units who worked hard to support the mission of PTA this year.

 Successes among the challenges:

* We had 13 local units exceed their membership numbers from last year!
* We had 57% member retention rate, which is greater than the National PTA average!
* Despite our local units’ frustration with not paying MD PTA dues on a normal schedule, we were able to keep our message consistent and prevent most local units from supplying the rogue MD PTA with funding. I consider this one of our biggest successes! We protected our membership’s money!
	+ Of course we communicated that locals would need to pay those funds—we just advised them to hold off on paying until we were sure the money would be used appropriately and in alignment with the PTA mission.

**Engage Series**

Tracie Potts too on the role of Membership VP this year to run the ENGAGE! Series of webinars for our parents. She will provide more information later. This was a great program and I hope there is someone who can continue her work!

**Memberhub**

We worked hard all through the 2019-2020 school year to convince our local units to use Memberhub, as we were told it would be required starting in July 2020. In late July/early August, the MD PTA board stated that Memberhub would not be required. This led to a lot of confusion for our local units. Some wanted to use it and were confused about if they were allowed to still use it. Others were relieved to be able to continue using AtoZ.

As of the time of this writing, local units are still allowed to use Memberhub. It is free for local units unless they want to purchase advanced features. There are fees associated with their e-commerce solutions.

The future of Memberhub is uncertain. At last count, 40 states were using Memberhub to manage membership and SOCA requirements. There is a lot of energy around creating digital PTA cards, which I wholeheartedly agree with. Convincing local units to issue paper cards in a digital word is a difficult task. Memberhub is built for this purpose. The big question: what will the new Free State PTA decide to do? We can’t properly train local units until we know what Free State PTA will require. Paper cards? Memberhub? Something else entirely? Who knows!

If MCCPTA has any influence at all, it would be wise to allow AtoZ to give a bid for becoming the Free State membership management program. AtoZ is a local company based in Maryland and many of our local units prefer it. Do they have the capability to provide digital cards? Do they have the capability to store SOCA documents and share them with the state? I don’t know, but it would go a long way toward making local units feel better about using a Free State required membership platform if AtoZ was allowed to make a bid.

**Membership Awards**

Membership awards are usually our go-to motivation to get local units to submit dues in a timely manner. We had a lot of comments from local units that they felt pushing awards was insensitive during a pandemic when PTAs were trying to provide basic services to their students. We did not want to be tone deaf and blithely keep pushing for membership when we knew there were more important things to worry about. Also, we had no idea when or how we would be able to give winning units their prizes. In prior years we set a monthly challenge and drew 10 gift card winners and one big prize winner at each DA. This year the logistics seemed impossible.

I would recommend re-establishing membership awards next year. I have several Giant gift cards to pass on to the next Membership Chair. There is also a form on Giant’s website to request support. Please contact me at carrie@palsson.us for help in filling out the form. Be sure to put your personal address down so the cards are delivered to you. They cannot be delivered to the Germantown MCCPTA office.

Advice/Recommendations:

* Before the school year starts, set up your membership awards for each month. The local units really like winning personalized banner or tablecloths, so be sure to budget enough for those items.
	+ I like to have at least one award be dependent on people sending in pictures showing that they are out there doing some of the suggestions we give them such as setting up a table at a school event or using the National PTA provided social media campaign materials. I have used Google Forms for this in the past.
* Use wheelofnames.com during the Delegates’ Assemblies to distribute the gift cards. It is easier than drawing names out of a hat.
	+ Be sure to ask DA secretary to put Membership Drawing on the agenda
* Determine year end membership awards prior to school starting and send a list to Pam in the office for printing in the blue book.
	+ I find the awards problematic. They favor higher income schools. I tried to create an application process for awards in the 2019-2020 school year but did not receive applications. This could have been due to the pandemic taking over. A change in awards would be very welcome. I am happy to brainstorm with you.
	+ For the future, I would HIGHLY recommend working with the Awards Chair as early as possible in the school year. If the Membership Awards could be packaged in with the other awards I think there would be a lot more traction for application based membership awards. It would also be much more convenient to have Membership and Awards committees coordinate one person purchasing the trophies than having two different committees trying to fit it into their busy schedules.
	+ Silver, Gold, Diamond, Platinum Awards—these are awards that were given out each year to recognize membership growth starting at just 5% growth. You really need a committee to handle awards because they need to be printed, put in envelopes and put in the pony at your local school (MCPTA internal mail system). This takes a lot of man hours. I think local units do appreciate these awards—you just need some help getting it all done.

**Dues Payments**

Getting dues payments in takes a lot of education and cooperation from the Cluster Coordinators. There is a membership groups.io where reminders are posted. I always sent dues reminders to all the groups.io lists—treasurer, president, and delegates. You never know who will check the e-mail and ask their board if dues are being paid.

Two years ago I started collecting the e-mail addresses of all the presidents and including them on the dues payment spreadsheet so that I could use the e-mail merge feature of Word to send out an occasional e-mail to the presidents to let them know what they had paid for so far this year and what they paid last year. I have included instructions for this in the Membership & Engagement one drive. The major issue is getting all of the e-mails. Because of the pandemic, this year many units did not fill out the blue book and many units were in disarray. It didn’t make a lot of sense to send out the reminders via the mail merge since it caused more confusion than clarity this year. Hopefully next year things will be more normal.

**Recommendations:**

* Ask Pam, the office manager, to keep the e-mail list up to date based on blue book listings. *Does Pam have enough hours to do this task?*
* Use the mail merge function to send a monthly statement out to the presidents.

**Dues Coupon**

Laura Mitchell, who often heads up our financial review team, has requested that we use google forms to collect payment information instead of a dues coupon. This gives an additional layer of record keeping, which is useful for the financial reviews. I have started working on this and need to finish testing the notifications. It will be ready prior to July 1 and the Comms team will need to replace the dues coupon link on the website.

Process:

* Local treasurer uses google form to fill out information regarding the amount of their payment, their school, and their contact information.
* Person submitting form and Pam receive a PDF notification that includes all information from the form (set up with Form Notification, a third party form add-on)
* Person submitting form prints out two copies of PDF. They keep one for their receipt book and send one to our PO Box with the check.
* When Pam receives the check, she goes into the google spreadsheet attached to the form and marks off payment received.
* Pam monitors the google spreadsheet and notifies units when their payment is not received. *How often should that happen?*

**Payments & Voting**

At the beginning of the year, find out from the President when local units must be paid and how much they must pay to participate in voting at the Delegates’ Assembly. Communicate this information widely to all the groups.io so that it is not a surprise when the delegates arrive and are unable to vote (spoiler alert: it will be a surprise to many no matter what you do).

The Membership Chair distributes the delegate cards at the DAs. At the first DA that the cards are required for voting you may have a long line of people wanting their cards and not understanding why they can’t get their cards. I recommend working with the executive committee ahead of this meeting to plan for support people to help move the line along.

**Recommendations**

* Announcements from as many parties on as many platforms as possible prior to the event encouraging payment to be sent to the PO Box well ahead of the deadline
* At least seven people managing the line
	+ Two (maybe more?) people (SSL high schoolers?) with lists that meet people at door and direct them into the correct line
		- Paid
		- Paying that night
		- Not going to pay—will just listen—send them in and they can bypass line
	+ Two people handing out cards to paid units. Make the person picking up write their name legibly on the spreadsheet.
	+ Three people taking payments and issuing receipts. Again, be sure to have the person picking up the cards write their name legibly on the spreadsheet. Being able to say exactly who picked up the cards is more important than a signature.
		- Bring enough receipts! You’ll need two copies for each payment—one for MCCPTA treasurer and one for the local unit. *If you get fancy, you could bring a printer and laptop to issue receipts. A carbon copy receipt book would also work well*
		- If at Carver, I would have the paid people go in through the first set of auditorium doors and snake the unpaid units along the back hall into the set of doors on the opposite side so no one is stuck out in the cold. Supply pens, clipboards, and dues coupons so they can fill out check and dues coupon while waiting in line.

**Training**

Plan to host trainings in the fall and spring. You may have to remind the training coordinator that you need training slots. I highly recommend at least two Membership sessions—Membership 101 for people who have no idea what they are doing. Many time membership chairs are brand new to the role and don’t understand the organization of PTA. I also like to have an event that is a sharing session. One year it was called “A Harvest of Ideas” where the leader acts as a moderator and encourages other local leaders to share. They have a wealth of information, and it is always great to hear new ideas. I can run trainings this spring and fall. Membership 101 will be difficult since we don’t know what is going on with Free State PTA and what they will require. I personally would like to see a training for Focus Schools and Title 1 Schools. I would like to share information on how to make PTA work at those schools. It is all about staff engagement! I am happy to lead or help with such a training.

***Local Units Missing Dues—as of June 2, 2021***

|  |  |
| --- | --- |
| Benjamin Banneker MS | NEC-Paint Branch |
| Brown Station ES | QO |
| Cannon Road ES | NEC-Springbrook |
| Captain James E. Daly ES | Clarksburg/Watkins Mill |
| Cedar Grove ES | Clarksburg/Damascus |
| Clarksburg HS | Clarksburg |
| Clearspring ES | Damascus |
| Cresthaven/Roscoe Nix ES | NEC-Springbrook |
| Fairland ES | NEC-Paint Branch |
| Fields Road ES | QO |
| Francis Scott Key MS | NEC-Springbrook |
| Gaithersburg ES | Gaithersburg |
| Gaithersburg MS | Gaithersburg |
| Georgian Forest ES | DCC |
| Germantown ES | Northwest |
| Greencastle ES | NEC-Paint Branch |
| Hallie Wells MS | Clarksburg/Damascus |
| JoAnn Leleck ES at Broad Acres | NEC-Springbrook |
| Lakelands Park MS | Northwest/QO |
| Lee MS | DCC |
| Little Bennett ES | Clarksburg |
| Lois P. Rockwell ES | Damascus |
| Montgomery Village MS | Watkins Mill |
| Rolling Terrace ES | DCC |
| Rosemont ES | Gaithersburg |
| Sargent Shriver ES | DCC |
| Snowden Farm | Clarksburg |
| South Lake ES | Watkins Mill |
| Spark Matsunaga ES | Northwest |
| Springbrook HS | NEC-Springbrook |
| Stedwick ES | Watkins Mill |
| Summit Hall ES | Gaithersburg |
| Thomas Edison HS | Wheaton |
| Watkins Mill ES | Watkins Mill  |
| Watkins Mill HS | Watkins Mill |
| Weller Road ES | DCC |
| White Oak MS | DCC |
| William B. Gibbs ES | Clarksburg |
| Wilson Wims ES | Clarksburg/Damascus |

***Local Units that have not met the 25 member threshold for due Dues—as of June 2, 2021***

|  |  |  |
| --- | --- | --- |
| Forest Oak MS | Gaithersburg |  10  |
| Jackson Road ES | NEC-Springbrook |  10  |
| Harmony Hills ES | DCC |  12  |
| Laytonsville ES | Damascus/Gaithersburg |  12  |
| Gaithersburg HS | Gaithersburg |  15  |
| Viers Mill ES | DCC |  16  |
| Dr. Sally K. Ride ES | SV |  19  |
| Brookhaven ES | DCC |  20  |
| Shady Grove MS | Magruder |  24  |
| Washington Grove ES | Gaithersburg |  24  |