

## Everett PTSA Council 7.3 Membership Subsidy Policy 2022-2023



Everett PTSA Council 7.3 does not use a membership dues subsidy program, as a result of being a PTA/PTSA Council that receives membership dues directly from its local PTAs. However, per Washington State PTA Uniform Bylaws Section 3.2.5 (“*Membership Subsidies and Gifts*”), a local PTA is welcome to designate part of its general funds to cover a membership subsidy program.

If a local PTA wishes to begin a membership subsidy program using its general funds, the following steps are required:

- 1) The board must create a written policy and procedure outlining the criteria for using general funds to pay for memberships. These criteria must fulfill a charitable purpose, such as encouraging engagement from a family for whom membership dues are a financial hardship at this time. A local PTA could violate IRS rules if it was buying memberships without a charitable purpose.

*A sample Membership Subsidy Policy that a local PTA can adapt is found on the following pages of this document. This policy can also be added to a local PTA’s Money Handling Policy.*

- 2) The membership must vote to add a standing rule to create the new membership subsidy program, referring to the written policy.

*Sample standing rule:*

*[PTA name] may offer full or partial membership subsidies to persons requesting them in accordance with the Membership Subsidy Policy, which shall be reviewed by the membership annually.*

- 3) The membership must vote to add a line to the PTA budget designating PTA funds to be used for subsidizing memberships. Note that, like all designated funds, the PTA membership may vote to “un-designate” the funds at a future membership meeting.

**Note:** PTAs may adapt this information to create their own form or may use the fillable form located on page 3.

[PTA name] shall run a membership dues subsidy program according to the following procedures:

1. Individuals become members by submitting a membership form (or using the online join at [link]) and by paying membership dues or requesting a membership subsidy.
2. Membership dues for joining [PTA name] are specified in the standing rules. The Washington State PTA (WSPTA) and National PTA (and council, if applicable) portions of the membership dues, found in WSPTA Policy section 3.3.1, shall be remitted to WSPTA for every member by entering the membership into the statewide membership database and paying the invoice.
3. Membership subsidies equal the WSPTA and National PTA (and council, if applicable) portions of the membership dues that are remitted to WSPTA. The sources of membership subsidy funds are:
  - a. Donations made by members or sponsors expressly for the purpose of subsidizing memberships. These donations make up the funds in the Membership Subsidies – Restricted budget line and unused funds carry forward in the restricted budget line from year to year until used.
  - b. [PTA name] general funds that the [PTA name] membership have designated for membership subsidies. The membership must vote on a specific number of membership subsidies to be funded. Those funds shall be included in the budget as Membership Subsidies – Designated. Unused funds carry forward in the designated budget line from year to year. The [PTA name] membership may vote to undesignate these funds at any membership meeting.
4. The criteria for receiving a membership subsidy are:

*NOTE: IRS regulations require that PTA funds be used to further its charitable purpose, as stated in its 1023 or 1024 filing. WSPTA recommends reviewing your PTA's charitable purposes before writing this section of the policy for your PTA, if your PTA chooses to fund membership subsidies using general funds designated for that purpose.*

*For privacy reasons, the PTA should not inquire with the school the names of families enrolled in the free and reduced lunch program in order to offer them membership subsidies.*

*Here are some possible criteria:*

a. Financial need.

A member for whom the membership dues constitute a financial hardship can indicate that by checking a box on the membership form.

I request a membership dues subsidy OR I request a subsidized membership

b. School staff.

*Many PTAs encourage participation of school staff by offering memberships. The PTA can make this offer to staff, but the staff member must actively accept the offer by filling out the membership form; a PTA cannot just enroll the entire staff without seeking the consent of each staff member.*

A staff member who wishes to have a subsidized membership shall fill out the membership form and indicate this by checking the box:

I request a subsidized staff membership