

Assigning and Updating PTA Leaders in memberplanet

All PTA/PTSA's must update their officer information in memberplanet, the membership database used by WSPTA. It is a requirement for all PTAs per the WSPTA Standards of Affiliation, it gives WSPTA and Northshore Council PTSA a means to contact a PTA/PTSA if a need arises, and it also ensures that leaders are included in important WSPTA and Northshore Council communications.

Who Needs to be Entered?

At a minimum, each PTA/PTSA must update the following roles:

- President
- Vice-President
- Treasurer
- Secretary

However, PTAs are encouraged to include *all* elected officers as well as key non-elected positions. Non-elected (appointed) standing committee roles which a PTA's Standing Rules indicate are voting board positions should be included.

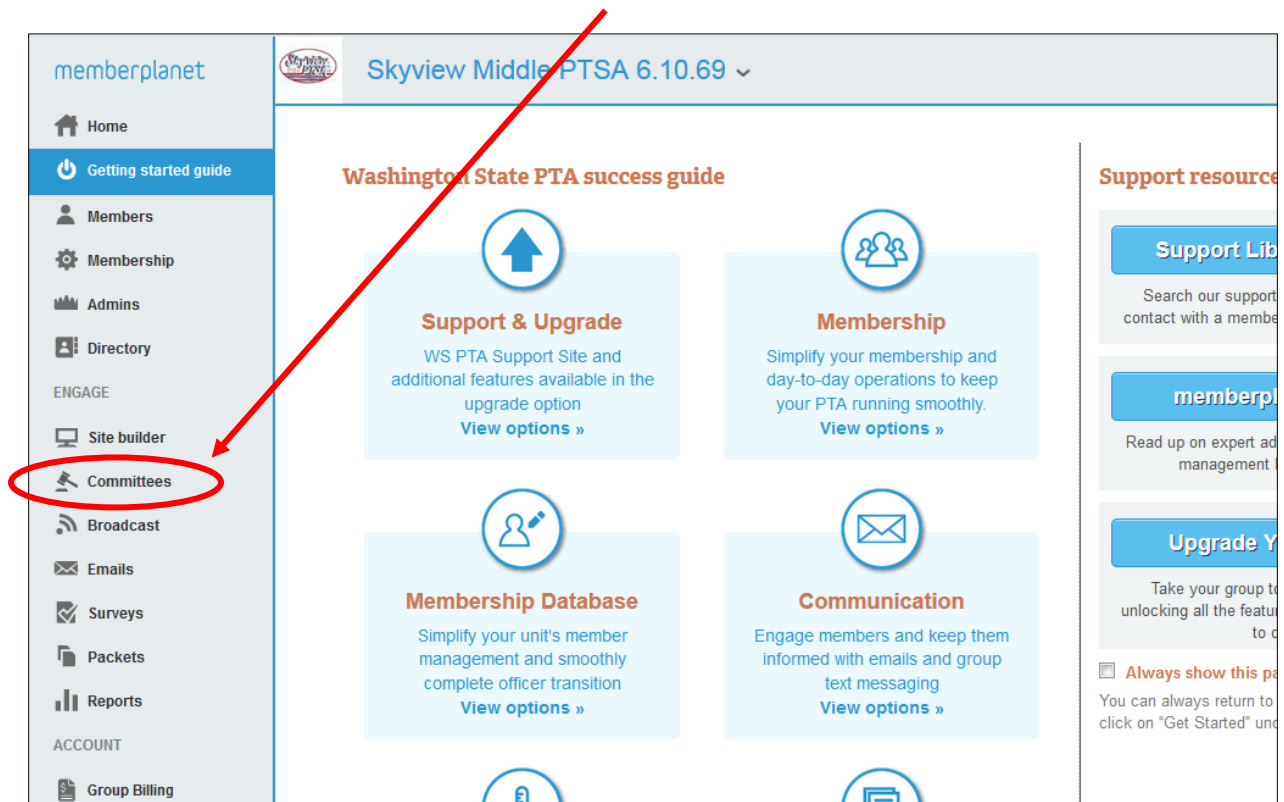
In addition, in Northshore, it is recommended that PTAs also include contact information for:


- Membership
- Advocacy/Legislative
- Special Education Representative
- Reflections
- Emergency Preparedness/E-prep

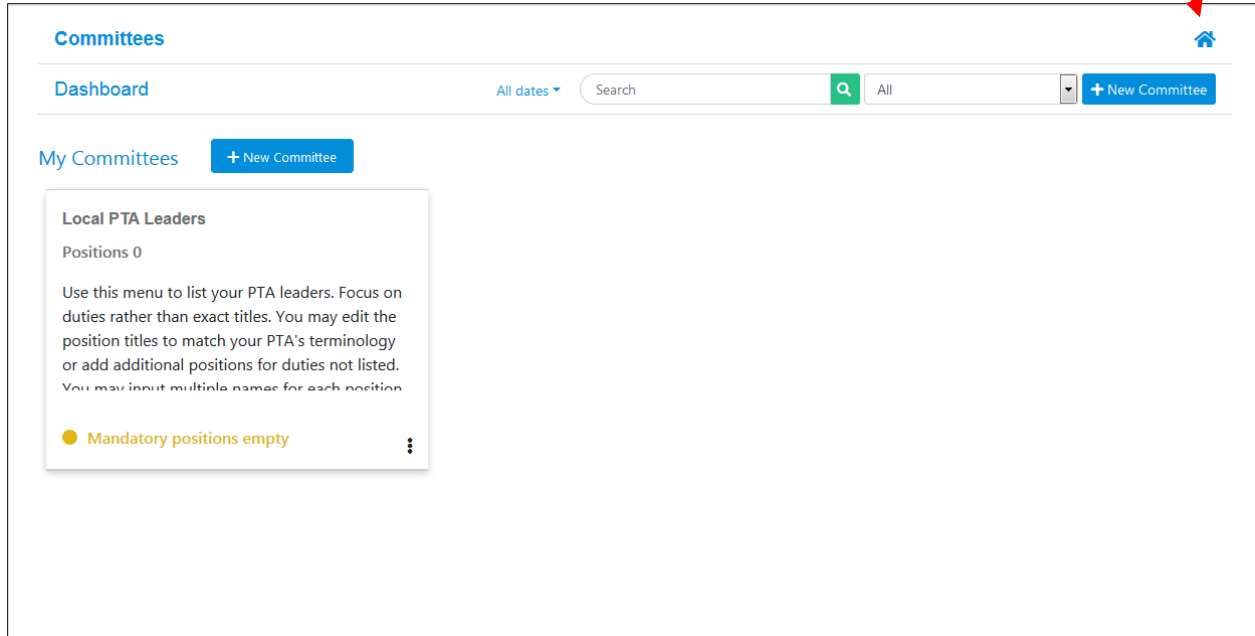
Officer information is communicated to WSPTA through memberplanet's "Committees" module.

Committee Module:

Access the Committee Module by clicking on “Committees” in the left navigation bar:



Note: After choosing "Committees," the view will change and the memberplanet navigation bar will no longer be visible. To go back to the main memberplanet admin screen, click on the home icon  in the upper right corner.



In the committee dashboard, click on the card that is displayed.



Note: The Committee Dashboard is in transition as memberplanet continues to adjust this feature. On launch, there was a board template that offered pre-selected position titles that users could edit to reflect their board. It was recently updated such that users must create a custom list. Regardless of the look, adding and editing positions continues to work in the same way.

Committees

Committee Dashboard Edit committee

Local PTA Leaders Edit committee

Mandatory positions empty

Use this menu to list your PTA leaders. Focus on duties rather than exact titles. You may edit the position titles to match your PTA's terminology or add additional positions for duties not listed. You may input multiple names for each position.

Positions **Notes**

Edit positions Edit terms

2020 - 2021 (07/01/2020 to 06/30/2021)

In this example, there are no pre-selected positions, so they need to be added. Click on “Edit positions” to start adding board members and other key positions.

Committees

General info > Positions

Add positions Go back

1. **Position name***

President

Position description (optional)

0/250

2. **How many people may hold this position at the same time?***

2

3. Save & add another position Finish

Committee positions

No positions added yet

Type in the name of the position (1) and be sure to indicate how many people may hold the position at the same time (2). A position description may also be added, but is optional. Then click “Save & add another position” (3).

Note: Washington State non-profit law mandates four officer positions, including President, Vice President, Secretary and Treasurer. So, each PTA needs to make certain those four positions are included. If a PTA's Vice President role includes an associated duty (e.g., “Vice President Membership” or “Vice President Communications”, etc.), that can be included as well. The roles can be customized to match the PTA.

The screenshot shows a web interface for managing committees. At the top, there's a 'Committees' header with a home icon. Below it, a breadcrumb trail shows 'General info > Positions'. The main content area is titled 'Add positions' and includes a 'Go back' button. On the left, there are three form fields: 'Position name*' with a placeholder 'Enter position name', 'Position description (optional)' with a large text area and a '/250' character count, and 'How many people may hold this position at the same time?*' with a dropdown menu set to '1'. On the right, a 'Committee positions' list contains one entry, 'President(2)', which is circled in red. To the right of this entry are edit and delete icons. At the bottom right, there are two buttons: 'Save & add another position' and 'Finish'.

In the example above, the President has been added and now appears in the “Committee positions” box on the right. The numeric indicator next to the position indicates the number of people who may hold the position at the same time (in this case, 2).

Continue adding positions until all have been entered.

Note: With regards to communications from WSPTA and Northshore Council (and ensuring the right people are added to the right mailing lists), job function is an important consideration. If someone does the job of one of the key positions listed under “[Who Needs to Be Entered?](#)” (see page 1) but does not have a job title that explicitly calls out that function, they could miss out on important communications related to that role because WSPTA and Northshore Council use the position names/job titles to determine who to add to which mailing list.

For example, if a PTA does not have a specific “Membership” position of any kind because in their PTA that is part of the Secretary’s job—it is important to make sure to explicitly associate that individual with Membership in the database to ensure they are added to key mailing lists for membership chairs as the information is going to be very relevant to them. With just the title of Secretary—there is no way for WSPTA or Council to know that this person is also in charge of membership, so they could miss out on potentially critical information. In this instance, it would be good to also add a “Membership” position and then assign that individual as both the Secretary position and the Membership role. An individual can be assigned to multiple positions/roles.

Committees 🏠

General info > **Positions**

Add positions Go back

Position name*

Position description (optional)

How many people may hold this position at the same time?*

Committee positions

President(2)	✎	🗑
Vice President Membership(2)	✎	🗑
Vice President Communications(2)	✎	🗑
Secretary(2)	✎	🗑
Treasurer	✎	🗑
Reflections Chair(2)	✎	🗑
Advocacy Chair(2)	✎	🗑
Emergency Preparedness Chair(2)	✎	🗑
Staff Appreciation Chair(2)	✎	🗑

Save & add another position
Finish

If any edits/changes need to be made to a position, click on the respective pencil icon.

Committees 🏠

General info > **Positions**

Add positions Go back

Position name*

Position description (optional)

How many people may hold this position at the same time?*

Save changes Cancel

Committee positions

Emergency Preparedness Chair(2)
Advocacy Chair(2)
President(2)
Reflections Chair(2)
Secretary(2)
Staff Appreciation Chair(2)
Treasurer
Vice President Communications(2)
Vice President Membership(2)

Finish

Then make any changes and click on the “Save changes” button. In the example above, the Advocacy Chair is being renamed “Legislative Chair.”

Committees 🏠

General info > **Positions**

Add positions Go back

Position name*

Position description (optional)
 /250

How many people may hold this position at the same time?*

Committee positions

- President(2)
- Vice President Membership(2)
- Vice President Communications(2)
- Secretary(2)
- Treasurer
- Reflections Chair(2)
- Legislative Chair(2)**
- Emergency Preparedness Chair(2)
- Staff Appreciation Chair(2)

Save changes **Cancel** Finish

Once the list is as desired, click on the “Finish” button at the bottom right to return to the Committee Dashboard main page.

Committees 🏠

Dashboard All dates ▾ Search All ▾ + New Committee

My Committees + New Committee

Local PTA Leaders

Positions 9

Use this menu to list your PTA leaders. Focus on duties rather than exact titles. You may edit the position titles to match your PTA's terminology or add additional positions for duties not listed. You may input multiple names for each position.

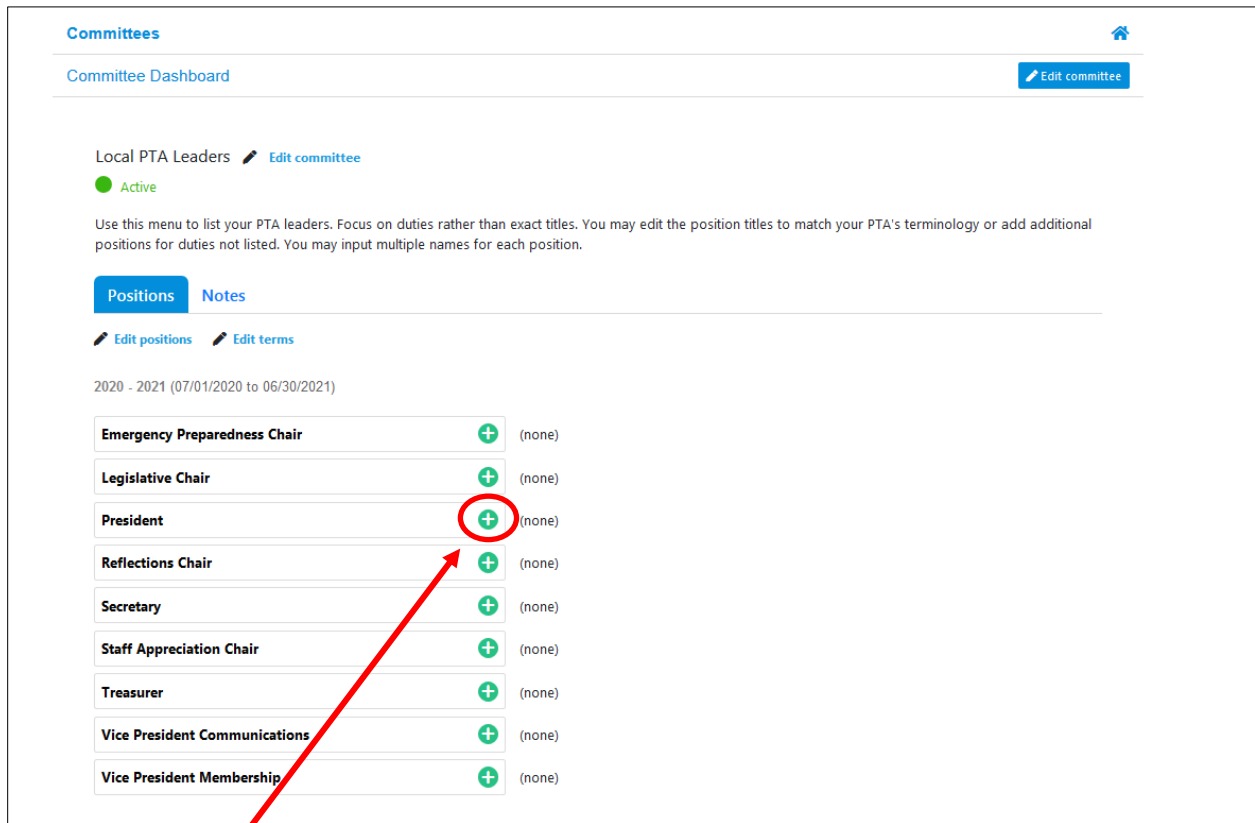
● Active

The Local PTA Leaders card is now Active and shows the total number of positions.

The next step is to assign names to each position.

Assigning Positions

On the main page of the Committee Dashboard, click on the Local PTA Leaders card to open it.



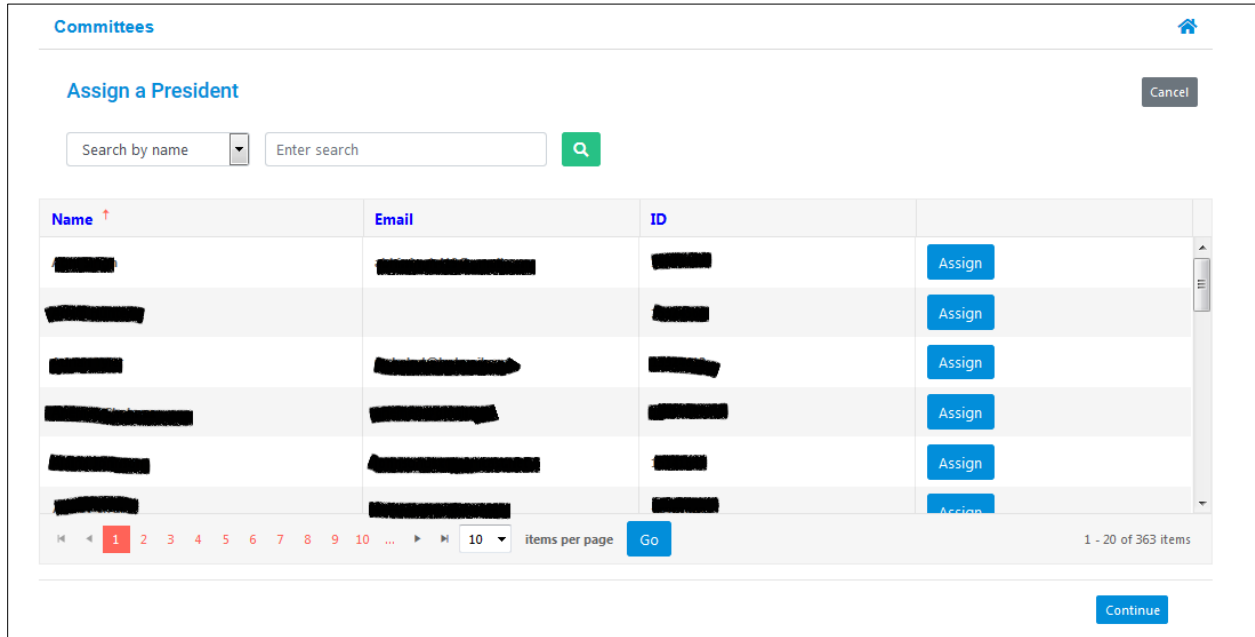
The screenshot shows the 'Committees' section of a dashboard. Under 'Committee Dashboard', there is a card for 'Local PTA Leaders' which is 'Active'. Below this, there are tabs for 'Positions' and 'Notes'. A list of positions is shown for the period '2020 - 2021 (07/01/2020 to 06/30/2021)'. The positions listed are: Emergency Preparedness Chair, Legislative Chair, President, Reflections Chair, Secretary, Staff Appreciation Chair, Treasurer, Vice President Communications, and Vice President Membership. Each position has a green plus sign icon to its right. The plus sign for the 'President' position is circled in red, and a red arrow points to it from below the screenshot.

Position	Action	Status
Emergency Preparedness Chair	+	(none)
Legislative Chair	+	(none)
President	+	(none)
Reflections Chair	+	(none)
Secretary	+	(none)
Staff Appreciation Chair	+	(none)
Treasurer	+	(none)
Vice President Communications	+	(none)
Vice President Membership	+	(none)

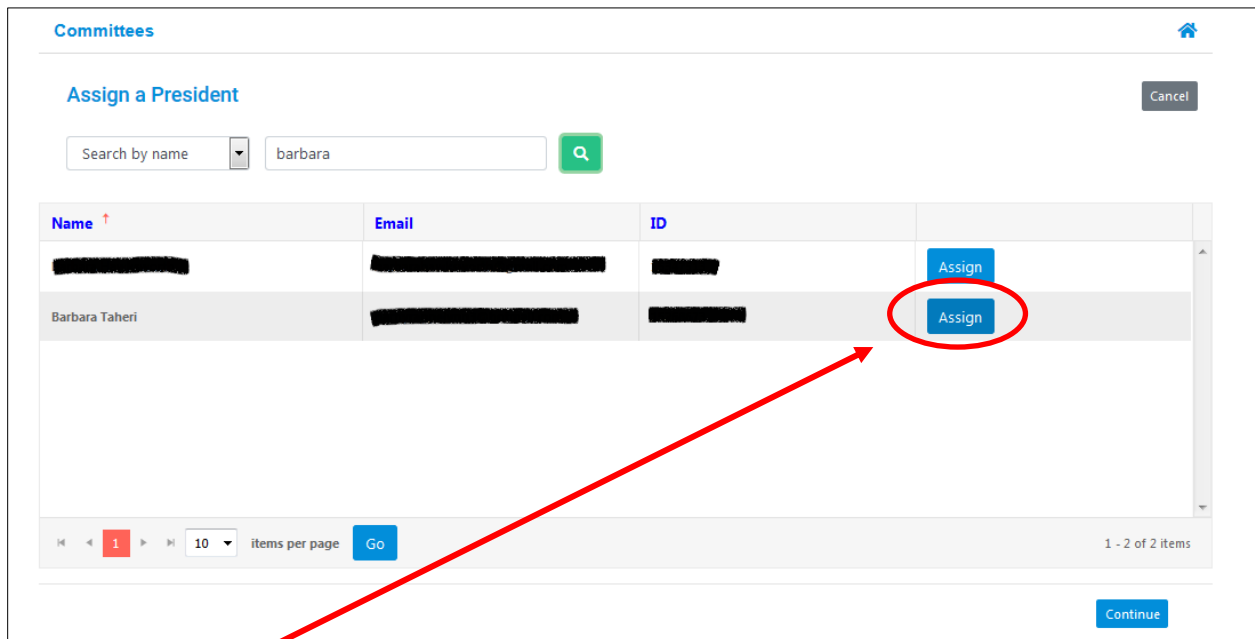
Click on the green plus sign next to a position to assign the role.

*Note: Individuals to be assigned **must already be in the database** for you to assign them their roles. If they are not in the database, be sure to add them as admins to the database account before proceeding. Instructions for adding admins are available in the "Washington State PTA Checklist for Online Membership Setup" (pages 5-6) available for download at: <http://wastatepta.memberplanet.com/membership.html>.*

Clicking on the green plus will open a list of all individuals listed in the local PTA's database (this list includes members from 2019-20 and any new members added in 2020-21).



Locate the person you wish to assign. You can use the search bar to search by name or email, then select a header to sort the column.



Click the "Assign" button that appears next to the individual to be associated with the position.

Committees 🏠

Assign a President Cancel

Search by name

Name ↑	Email	ID	
[REDACTED]	[REDACTED]	[REDACTED]	Assign
Barbara Taheri	[REDACTED]	[REDACTED]	✓

10 items per page 1 - 2 of 2 items

The entry will then be marked with a green checkmark. Click the “Continue” button at the bottom right to finish and return to the Local PTA Leaders assignment page. The leader’s first name will appear next to the assigned position.

Committees 🏠

Committee Dashboard

Local PTA Leaders

● Active

Use this menu to list your PTA leaders. Focus on duties rather than exact titles. You may edit the position titles to match your PTA's terminology or add additional positions for duties not listed. You may input multiple names for each position.

Positions **Notes**

2020 - 2021 (07/01/2020 to 06/30/2021)

Emergency Preparedness Chair	<input type="button" value="+"/> (none)
Legislative Chair	<input type="button" value="+"/> (none)
President	<input type="text" value="Barbara"/> <input type="button" value="✎"/> <input type="button" value="🗑"/>
Reflections Chair	<input type="button" value="+"/> (none)
Secretary	<input type="button" value="+"/> (none)
Staff Appreciation Chair	<input type="button" value="+"/> (none)
Treasurer	<input type="button" value="+"/> (none)
Vice President Communications	<input type="button" value="+"/> (none)
Vice President Membership	<input type="button" value="+"/> (none)

Continue to assign individuals to each of the roles.

If there are co-leaders in a role, be sure to assign each of them to the role.

Local PTA Leaders [Edit committee](#)

● Active

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Positions [Notes](#)

[Edit positions](#) [Edit terms](#)

2020 - 2021 (07/01/2020 to 06/30/2021)

Emergency Preparedness Chair		(none)
Legislative Chair		(none)
President		Barbara
Reflections Chair		(none)
Secretary		(none)
Staff Appreciation Chair		(none)
Treasurer		(none)
Vice President Communications		(none)
Vice President Membership		Megan
Vice President Membership		Bushra

Once the position has been 'filled' – i.e., the maximum number of people who could hold the position is met – the green plus next to the position disappears.

To edit the number of people who may hold the position at the same time, click on "Edit position" above the table. (See page 4 for more info.)

There may be an instance where the email in the database (i.e., the email used to sign up for membership) is different than the email that individual wants used for PTA business, or perhaps the email just needs to be updated.

Legislative Chair	+	(none)
President	+	
Reflections Chair	+	
Secretary	+	
Staff Appreciation Chair	+	
Treasurer	+	
Vice President Communications	+	(none)
Vice President Membership	+	(none)

Barbara

[Redacted Email Address]


+ Add another email address

[Empty Input Field]


+ Add another phone number

Cancel Continue

Once you have assigned a role, you can change a person's contact info by clicking the pencil icon next to their name. That will open a box where the additional email address can be entered. Then use the dropdown to select their preferred email for PTA business.

Committees 



Committee Dashboard [Edit committee](#)

Local PTA Leaders  [Edit committee](#)


























● Active


Use this menu to list your PTA leaders. Focus on duties rather than exact titles. You may edit the position titles to match your PTA's terminology or add additional positions for duties not listed. You may input multiple names for each position.

Positions [Notes](#)

 [Edit positions](#)  [Edit terms](#)

2020 - 2021 (07/01/2020 to 06/30/2021)

Emergency Preparedness Chair 	Cynthia  
Legislative Chair 	Jennifer  
President 	Barbara  
Reflections Chair 	(none)
Secretary 	Lucy  
Staff Appreciation Chair 	Pauline  
Treasurer	Serena  
Vice President Communications 	Melissa  
Vice President Membership	Megan  
Vice President Membership	Bushra  

Once all leaders are entered, click on the home icon  at the top right to return to the Committee Dashboard home.

Then click the home icon one more time to return to the main memberplanet interface.

Resources:

- WSPTA Success Site - <http://wastatepta.memberplanet.com/>
- memberplanet webinar (7/16/2020) (Committees info starts at 41:52) - <https://vimeo.com/441517073>
- "Washington State PTA Checklist for Online Membership Setup" (Committees info on pages 8-10) can be downloaded at - <http://wastatepta.memberplanet.com/membership.html>