California Teachers Association

2018-2019

Membership Handbook

A Guide to Membership Processing

1705 Murchison Drive • Burlingame • California • 94010

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INTRODUCTION

Congratulations on your role as a chapter Membership Contact! This is one of the most important roles in the chapter as updated, accurate membership information is critical to building a strong local chapter. Correct and current membership information also helps in chapter planning so members can be contacted for activities, meetings and other organizing events.

As member contact information changes or members move work locations within the district, it is important to use the membership apps and tools discussed in this handbook to update member records. Also, as the local has elections or appoints members to leadership positions, those positions need to be recorded in the membership system to ensure those members receive all communication from CTA regarding their leadership roles. Lastly, it is important to learn how to sign up members, communicate membership information to the district, CTA and your site representatives and officers to keep them up to date with current membership roster information.

This handbook will provide you with the information you need to be successful in your role and we encourage you to thoroughly review this document, coordinate your activities based on these best practices and reference the handbook to explain membership policies and practices to leaders and members alike.

Be sure to visit the dedicated website for Membership Contacts and local leaders at www.CTAGo.org/Membership. At this site you'll find all the tools, resources and contacts you need to be successful in your role. Also, each local chapter has a dedicated CTA Membership staff person assigned to support you; they can be reached at 650-552-5278 or Membership@CTA.org.

MEMBERSHIP TIMELINES

ONGOING ACTIVITIES

Send in new enrollments weekly to CTA and submit district copy of enrollment form to district payroll office as soon as possible.

Establish a recruitment plan for working with non-members and develop ongoing strategies to encourage membership.

JULY- AUGUST

Receive start-up membership materials packets and membership roster. Continuing member's cards will be sent under separate cover. Meet with Site Representatives to distribute membership cards and materials.

Instruct Site Representatives to return cards for members no longer in their building to Membership Chairperson. Notify CTA if these individuals no longer work in the district.

Provide copy of membership dues schedule to Site Representatives.

Share this calendar with Site Representatives to ensure a coordinated effort.

Contact district payroll office to ensure correct deduction amounts and determine payroll cutoffs for new year.

SEPTEMBER

Return membership roster or cards/carrier strips with all changes noted to CTA Membership Accounting.

OCTOBER

October 31 deadline for remitting payments for cash membership renewals.

NOVEMBER

Receive Verification Roster from CTA to verify membership and counts for NEA Representative Assembly delegate allocation.

JANUARY

Deadline for returning November Verification Roster to CTA. Please return sooner if possible.

MARCH

Receive Verification Roster from CTA to confirm accuracy of local association membership file.

APRIL

Deadline for returning March Verification Roster to CTA.

FUTURE YEAR PROCEDURES

MAY

Local Association Treasurer receives Local Dues Request from CTA via email to provide future year local dues.

Local Association President receives Local Officer Request from CTA via email to provide update of future year local officers. This information is critical to ensure that current leaders receive all communications.

JUNE

Deadline to return Local Dues Request email regarding next year's dues.

Deadline to notify CTA of updated Local Officer name, role and contact information.

JULY

District payroll office or Membership Chairperson receives membership roster with dues amounts for the new year.

AUGUST

Deadline to return Payroll Member Verification Roster to CTA.

Note: Specific due dates will accompany all mailings. Please contact the CTA Membership Department at any time with questions. Contact us at Membership@cta.org or 650-552-5278.

DEFINITION OF ACTIVE CATEGORIES

Membership Year September 1 through August 31

ACTIVE - Active membership shall be open to any person engaged in, or who is on a limited leave of absence from non-administrative, non-supervisory professional educational work. The definition of administrative or supervisory status in higher education units shall be determined by the governing body of the local association chapter. Active members shall hold or shall be eligible to hold a baccalaureate or higher degree or the regular teaching, vocational, or technical certificates required by their employment.

Active Full Time - Category 1
For those faculty whose teaching assignment is more than 60% of a normal assignment, except for faculty employed as pre-school, head start and child care, adult education, and substitute teachers whose salaries are less than the minimum teacher salary for the district in which they are employed.

Active Part Time - Category 2A
For those faculty whose teaching assignment is greater than 1/3 but not more than 50% of a normal assignment.

Active Part Time - Category 2B
For those faculty whose teaching assignment is greater than 50% but not more than 60% of a normal assignment, or faculty employed as pre-school, head start, child care, adult education, and substitute teachers whose salary in the district in which they are employed is less than the minimum salary paid regular teachers in such district.

Active Part Time - Category 3A
For those faculty or substitutes whose teaching assignment is 25% or less than a normal assignment, including faculty on unpaid leave.

Active Part Time - Category 3B
For those faculty whose teaching assignment is greater than 25% but not more than 1/3 of a normal assignment or those faculty employed in private higher educational institutions or the University of California for whom no representation by the Association in employer-employee relations exists or is immediately contemplated.

Active Part Time – Category 4
For those adult education and community college employees employed only on a part-time or hourly basis.

NOTE: Article III, Sec. 2, d – Anyone admitted to any category of membership in the Association must also become a member through the payment of dues both in the chapter serving the area or level in which s/he is actively employed and of the National Education Association. (Amended January 1998)

Those eligible for membership in more than one school district shall be enrolled in their primary place of employment.

* Category placement is determined by the local chapter and based on the percentage of teaching assignment.

WHEN ARE DUES PRO-RATED?

After the beginning of any membership year, the dues of Active members who are enrolling for the first time may be pro-rated through payroll deductions. Cash payment of dues may also be pro-rated for the balance of the membership year for any member who authorizes payroll deduction of membership dues the following year.

Maintaining Continuous CTA Membership

Concern for our members is of the utmost importance. We highly encourage you to inform your local members that go on a leave of absence about the invaluable benefits they may be jeopardizing by not maintaining CTA membership. Maintaining membership during a leave of absence is critical because:

- Participation in the CTA Group Legal Services Program requires membership at the time the incident occurs and requires that membership be maintained while legal assistance is being provided.
- Members will keep their eligibility and continuous years of service for our Death & Dismemberment Plan (the benefit provided by this plan is determined by *continuous* years of CTA membership).
- Members who take advantage of CTA's insurance programs can continue their coverage at CTA exclusive rates and without coverage interruption.

CTA's practice is to allow members on a leave of absence to maintain membership at the category 3A level.

CTA Education Support Professionals

In June 2006, CTA State Council of Education held a historic vote that authorized full membership rights for all ESP members in California. This group is comprised of all of the classified employees in each school district.

Please see pages 21 and 22 for ESP enrollment form and instructions.

ASSOCIATE

Associate membership shall be open to any person who is interested in advancing the cause of public education but who is not eligible for any other class of membership in the Association. The different types of eligibility and services for such membership shall be prescribed in the CTA Standing Rules.

Administrative and supervisory personnel are eligible for CTA Associate membership. The dues level for Associate members is based on the full CTA Category 1 amount for the membership year for which they are eligible. Local Associate membership is available when the local chapter by-laws provide same.

CTA members who participated in the economic services programs of the Association prior to becoming CTA Associate members, may continue participation. All CTA Associate members shall receive the official publication of the Association.

Supervisors and/or Administrators may have payroll deductions for their CTA/NEA associate dues unless they are represented by a separate bargaining unit.

CTA/NEA RETIRED

Any person who was an Association member at, or prior to, the time of retirement and who is a qualified applicant for or recipient of service or disability retirement allowances from a public or private retirement system, is eligible for retired membership.

Active members who will be retiring should be encouraged to continue membership as retired members, especially if they participate in any of the economic services offered by CTA or NEA sponsored vendors. Participation in such programs requires continuous membership.

CTA/NEA-Retired	Annual	$ 70.00
	Lifetime	450.00

Annual dues may be paid by personal check or monthly through member's STRS benefit check. Authorization forms for monthly deductions are available from the Membership Accounting Department.

CTA/NEA PRE-RETIRED SUBSCRIBER

Members of CTA are eligible to become Pre-Retired Subscribers during the time prior to actual retirement. By paying life membership dues, members become eligible to receive the benefits and services of CTA/NEA Retired immediately upon retirement.

CTA/NEA Pre-Retired Lifetime $450.00

STUDENT

CTA $15.00 (includes $5 Local Student CTA dues); NEA $15.00 - Any person regularly enrolled in an institution of higher education in the State of California preparing to become a teacher and eligible to become a member of the Student California Teachers Association under the provisions of the governance documents of that association may become a Student member.

Any teacher joining CTA/NEA as an Active member during his/her first year of eligibility can request a rebate of Student dues paid; $10 per year up to five years for CTA and $20 per year, up to four years for NEA. Please contact CTA Human Rights Department for rebate application forms.

Students may enroll in one of two ways:

1. Complete a Student CTA enrollment form and send with check or money order for full annual Student CTA/NEA/Local dues to the SCTA office, P.O. Box 921, Burlingame, CA, 94011-0921.

2. On line with a major credit/debit card at http://www.nea.org/join.

MEMBERSHIP ROSTER INSTRUCTIONS

INSTRUCTIONS FOR UPDATING MEMBERSHIP ROSTERS

During the membership year, rosters will be sent to the local chapter for update and return (see timelines on page 2). When received, corrections should be made as follows (see sample on page 9).

1. Review the roster for accuracy, making sure all changes have been noted.

   a. Make **all** corrections in space provided near information to be updated.

   b. **Do not write over any of the existing printed information. This must be kept legible for data entry purposes.**

   c. Write changes in red, or any color ink or pencil that will stand out.

   d. To remove someone from the roster, write **"DELETE"** in the center of the roster and the reason for deletion. **DO NOT CROSS THROUGH MEMBER NAME**. Ideally, the effective month of deletion should also be included. Please refer to page 11 on membership cancellation.

   e. To add a member, send a completed enrollment form to CTA. If an enrollment form has been provided previously and the member does not appear on the roster, send a copy of the enrollment form retained by the local or contact your CTA Membership staff person.

   f. If adding NEA-Fund for Children and Public Education, CTA/FACT Disaster Relief Fund, or scholarship fund contributions, send the CTA copy (top copy) of the authorization form. If that copy has been provided previously and the contribution does not appear in the member's record on the roster, send a copy of the authorization retained by the local.

   g. If your local has changed its local dues amount from what is reflected on the cover letter, which was provided with your roster, please send a memo to that effect when returning your roster. It is not necessary to correct every individual amount on the roster itself. **Important: Be sure to notify your district payroll department and Membership Accounting of any change in local dues.**

2. When returning a roster to CTA listing individuals paying cash, please include a check made payable to CTA to cover all cash renewals no later than the end of October to ensure that members renewing continue to receive CTA/NEA services. Renewal payments and enrollment forms for members switching from cash to payroll deduction can be sent without the roster by utilizing the membership transmittal form (see page 25).

CTA MEMBERSHIP ROSTER 20XX—20XX

Page 1 of 10
Run By: STAFF
Run Date: XX/XX/20XX

SAMPLE TCHRS ASSN—1234
SAMPLE UNIFIED

MEMBER NAME CONTACT ID SSN4 WORK LOCATION	ADDRESS CITY STATE ZIP TELEPHONE EMAIL	PRINT ALL UPDATES/NOTES IN THIS AREA	STATUS DED ENROLL DATE	NEA CAT CTA CAT LEA CAT CCA CAT	NEA DUES CTA DUES LEA DUES CCA DUES	ABC OPT OUT AND/OR VOL CONT	DUES TOTAL AMT/PR DED
ABBOT, ABIGAIL ① 0001235487 ② 4765 TEST ELEMENTARY ③	123 TESTING AVE ④ TEST CITY, CA 94066 (555)555-1234 ⑤ TEST@XXXX.COM ⑥	_____ _____ _____	ACTIVE 10 09/01/2013	61% - 100% ⑦ 61% - 100% 61% - 100%	$$$.$$ ⑧ $$$.$$ $$$.$$		⑨$$$.$$ $$.$$

THE NUMBERS BELOW CORRESPOND WITH THE NUMBERS ON THE SAMPLE ABOVE.

1. Member Name.
2. Contact ID - Member's computer-unique identification number. **DO NOT** mark over this number at any time.
3. Work Location.
4. Member’s home address, City, State and Zip.
5. Telephone number.
6. Member’s primary email.
7. Category.
8. Dues amounts.
9. Total dues and Monthly payroll deduction amount.

HANDLING OF MEMBERSHIP CARDS

INSTRUCTIONS FOR HANDLING MEMBERSHIP CARDS

Membership cards are imprinted with member's name, local affiliate and membership classification: Active, Life, Retired, etc. Cards are issued for all cash and payroll members on the CTA/NEA master file as of June, and mailed to Membership Chairpersons for distribution when school opens. The cards are run in alphabetical order by school to facilitate distribution. Because the June records were used for production of these membership cards, there may have been additions or deletions since that time. Consequently, these cards should be checked carefully before issuing to the members. If a membership card was not included for a member, it could indicate that CTA has not received enrollment information. In these instances, a new enrollment form or copy of the form retained by the local for their files must be sent to CTA.

For those members paying cash, upon receipt of cash payment, the card will be distributed to the member.

If a cash paying member changes to payroll deduction, have the member complete a new enrollment form (see instructions on page 13).

The membership card is attached to a carrier strip which has pre-printed member information. If any of this information is incorrect, the member should write the correct information in the space indicated on the carrier strip and give to the Membership Chairperson for forwarding to CTA or, the Membership Chair can make updates directly to the CTA system.

Membership cards issued for members who are no longer with the district should be destroyed. Please note on the payroll roster that the member is retired, left district, etc.

UPDATE: Janus v AFSCME – Fair Share Fees

The Supreme Court of the United States (SCOTUS) overturned 41 years of precedent on June 27, 2018, ruling the collection of fair share (agency) fees unconstitutional. Fair share fees were previously collected by fair share locals from bargaining unit members that chose not to join the union but received the benefits (wages, benefits and working conditions) of the collective bargaining process.

Given the SCOTUS decision, CTA provided notice to districts, locals and fee payers that fees only be collected from members after the SCOTUS decision. It is important the payroll deductions be collected only from members. Districts and locals must work collaboratively to reach this objective.

SB 866 legislation signed in June affirmed membership dues are a matter of agreement between members and their union, can only be revoked in writing and must comply with the terms of the employee's authorization. Revocation requests of membership must be directed to the local president.

CTA MEMBERSHIP DROP PROCESS

What is a Valid Membership Drop Request?
Requests to drop local/CTA union membership must be made in writing to the Local Chapter President by the individual wanting to drop membership. The request can be made only by the individual member on his/her own behalf. The request may not be made over the phone or by email.

The written letter request to drop membership must include:

- Stated formal request to drop membership
- Member's Full Name: First and Last
- Home Address
- Name of Local Chapter/Union
- Date
- Original signature (photo copies of signature are not acceptable)
- CTA Membership Identification number (optional)

Delivery:
Request should be delivered to the Local Chapter President via either U.S. mail or hand delivery.

Drop Process Timeframe:
Reasonable efforts should be made to process valid drop requests within 15 working days after the request is received by the Local Chapter President.
(See Steps to the Drop Process)

STEPS TO THE DROP PROCESS

Valid Drop Request Delivered:
Member provides a valid drop request to the Local Chapter President via U.S. mail or hand-delivery or by dropping it at local Chapter office if designated by the Chapter. For a drop request to be valid and processed, it must include a stated formal request to drop membership, member's full name, home address, name of local, date, and original signature. The fifteen working day process begins once a valid drop request is received by the local president.

Have Organizing Conversation with Member:
Identify the most compelling person to hold a one-on-one conversation with the member. Conversation can be done by any leader or member. The benefits of collective bargaining and advocacy should be discussed, and all the member benefits that will be lost should be shared. Utilize voluntary termination or recommitment forms in asking the member to reconsider. Be sure to listen, try to directly address the member's concerns, and document the reasons.

Completing the Request:
The member will either agree to rescind the request to drop or will want to drop membership. If the individual decides to drop membership, mail or scan a copy of the valid drop request along with a reason for the drop to the CTA Membership Department. Email to Membership@cta.org or mail to CTA Membership - P.O. Box 4178, Burlingame, CA 94011-4178.

INSTRUCTIONS FOR COMPLETING ENROLLMENT FORMS

Enrollment forms are used for enrolling new members, members returning from leave and/or members changing Districts/Locals.

PAYROLL DEDUCTION

Member completes, signs and dates enrollment form. Completed forms should be forwarded by site representatives to the Membership Chairperson. Site Representative gives fourth copy of the enrollment form to member as proof of membership. Pro-rated dues may be available after the beginning of the membership year for members joining the Association for the first time.

CASH PAYERS

Member completes enrollment form and issues check payable to the Local for full, unified dues. Site Representative gives fourth copy of form to member and collects check for payment of annual dues. Members may pay pro-rated dues by check providing a payroll authorization is completed for subsequent membership years. Site Representative forwards enrollment forms and checks to Membership Chairperson.

DISTRIBUTION OF ENROLLMENT FORM COPIES

1. Membership enrollment forms are generally printed in multiple copy form. The first copy of the form is sent to CTA Membership Accounting. Before forwarding the forms to CTA, check to be sure that the membership enrollment form is correctly and completely filled out and signed.

2. Second copy to school district payroll department. It is critical that the payroll department receive their copy as soon as possible.

3. Third copy to local association for its files.

4. Fourth copy given to member at time of enrollment.

See “How to Complete the Member Enrollment Form” for details on the various components of the new enrollment form.

Do not use old enrollment forms. Use only the form that is on the following pages. Please recycle old, blank forms.

How to Complete the Member Enrollment Form

This How-To Sheet is intended for Chapter Leaders that are assisting new members to complete the enrollment form

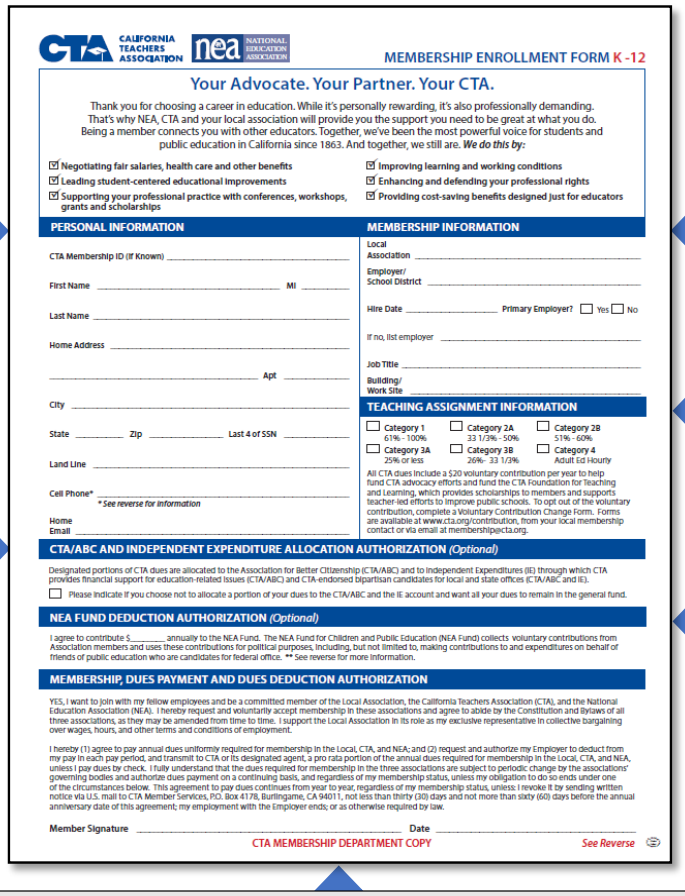
Be sure to only use this form, do not use any other enrollment form.

Personal Information:

- Enter the member name and contact information.
- Ensure to include both the land line & cell number.
- Home email is very important to be able to communicate with the member.
- If moving from another district, include the CTA Membership ID and/or the last 4 digits of the SSN to help link any previous records with any updated information.

CTA/ABC Allocation:

Allows the member to decide to opt out of allocating a portion of dues to support pro education candidates and issues.



CTA CALIFORNIA TEACHERS ASSOCIATION nea NATIONAL EDUCATION ASSOCIATION

MEMBERSHIP ENROLLMENT FORM K -12

Your Advocate. Your Partner. Your CTA.

Thank you for choosing a career in education. While it's personally rewarding, it's also professionally demanding. That's why NEA, CTA and your local association will provide you the support you need to be great at what you do. Being a member connects you with other educators. Together, we've been the most powerful voice for students and public education in California since 1863. And together, we still are. *We do this by:*

- ☑ Negotiating fair salaries, health care and other benefits
- ☑ Leading student-centered educational improvements
- ☑ Supporting your professional practice with conferences, workshops, grants and scholarships
- ☑ Improving learning and working conditions
- ☑ Enhancing and defending your professional rights
- ☑ Providing cost-saving benefits designed just for educators

PERSONAL INFORMATION

CTA Membership ID (If Known) _____

First Name _____ MI _____

Last Name _____

Home Address _____

Apt _____

City _____

State _____ Zip _____ Last 4 of SSN _____

Land Line _____

Cell Phone* _____ *See reverse for information

Home Email _____

MEMBERSHIP INFORMATION

Local Association _____

Employer/ School District _____

Hire Date _____ Primary Employer? ☐ Yes ☐ No

If no, list employer _____

Job Title _____

Building/ Work Site _____

TEACHING ASSIGNMENT INFORMATION

☐ Category 1 61% - 100% ☐ Category 2A 33 1/3% - 50% ☐ Category 2B 51% - 60%
☐ Category 3A 25% or less ☐ Category 3B 26% - 33 1/3% ☐ Category 4 Adult Ed Hourly

All CTA dues include a $20 voluntary contribution per year to help fund CTA advocacy efforts and fund the CTA Foundation for Teaching and Learning, which provides scholarships to members and supports teacher-led efforts to improve public schools. To opt out of the voluntary contribution, complete a Voluntary Contribution Change Form. Forms are available at www.cta.org/contribution, from your local membership contact or via email at membership@cta.org.

CTA/ABC AND INDEPENDENT EXPENDITURE ALLOCATION AUTHORIZATION *(Optional)*

Designated portions of CTA dues are allocated to the Association for Better Citizenship (CTA/ABC) and to Independent Expenditures (IE) through which CTA provides financial support for education-related issues (CTA/ABC) and CTA-endorsed bipartisan candidates for local and state offices (CTA/ABC and IE).

☐ Please indicate if you choose not to allocate a portion of your dues to the CTA/ABC and the IE account and want all your dues to remain in the general fund.

NEA FUND DEDUCTION AUTHORIZATION *(Optional)*

I agree to contribute $_____ annually to the NEA Fund. The NEA Fund for Children and Public Education (NEA Fund) collects voluntary contributions from Association members and uses these contributions for political purposes, including, but not limited to, making contributions to and expenditures on behalf of friends of public education who are candidates for federal office. ** See reverse for more information.

MEMBERSHIP, DUES PAYMENT AND DUES DEDUCTION AUTHORIZATION

YES, I want to join with my fellow employees and be a committed member of the Local Association, the California Teachers Association (CTA), and the National Education Association (NEA). I hereby request and voluntarily accept membership in these associations and agree to abide by the Constitution and Bylaws of all three associations, as they may be amended from time to time. I support the Local Association in its role as my exclusive representative in collective bargaining over wages, hours, and other terms and conditions of employment.

I hereby (1) agree to pay annual dues uniformly required for membership in the Local, CTA, and NEA; and (2) request and authorize my Employer to deduct from my pay in each pay period, and transmit to CTA or its designated agent, a pro rata portion of the annual dues required for membership in the Local, CTA, and NEA, unless I pay dues by check. I fully understand that the dues required for membership in the three associations are subject to periodic change by the associations' governing bodies and authorize dues payment on a continuing basis, and regardless of my membership status, unless my obligation to do so ends under one of the circumstances below. This agreement to pay dues continues from year to year, regardless of my membership status, unless: I revoke it by sending written notice via U.S. mail to CTA Member Services, P.O. Box 4178, Burlingame, CA 94011, not less than thirty (30) days and not more than sixty (60) days before the annual anniversary date of this agreement; my employment with the Employer ends; or as otherwise required by law.

Member Signature _____ Date _____

CTA MEMBERSHIP DEPARTMENT COPY See Reverse

Membership Information:

- Include the full name of the local, employer and hire date.
- If this is not the primary employer, include the name of the primary employer.
- Include the full school name where the member works so the local can contact the new member.

Teaching Assignment:

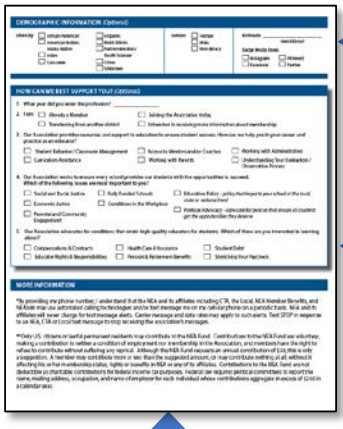
Select the percentage of time worked, see reverse for more info on categories. Note the explanation of the voluntary dues amount.

NEA Fund Deduction:

Members have an opportunity to contribute to the NEA Fund supporting federal candidates that are pro-education. The total contribution will be deducted on a pro-rata basis over the school year.

Membership, Dues Payment and Dues Deduction:

Outlines the terms of membership and identifies the local as the exclusive representative of the member for collective bargaining and employment conditions. Dues for the local, state and national associations will be deducted each pay period during the year. The member may revoke membership by notifying the local chapter president in writing and may cancel dues payments during a window between 30-60 days before their anniversary date of enrollment by notifying CTA via mail. **Important: Member must sign and date the form.**



Demographics:

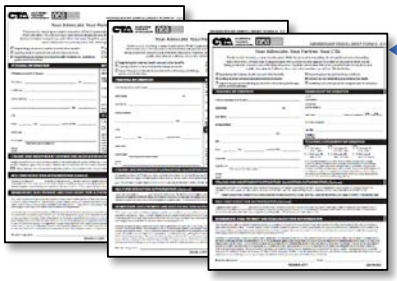
Optional information to help CTA better serve members.

CTA Survey:

This brief survey helps to identify the areas of interests of the new member. CTA has many programs and benefits for members and by completing this section, the local and CTA can better meet the needs of members.

More Information:

More details about how a member may be contacted via text messaging. Also, details regarding the contribution to the NEA Fund.



4 Part Form:

- Top sheet = Return to CTA Member Services in Burlingame as soon as complete.
- Page 2 = District Copy
- Page 3 = Local Copy
- Page 4 = Member Copy

Four easy ways to return forms to CTA:

☑ Fax forms to CTA at 650-552-5061

☑ Mail forms to CTA, PO Box 4178, Burlingame, CA 94011

☑ Email forms to Membership@CTA.org

☑ Drop off forms at your local CTA Office

CERTIFICATED

ENROLLMENT FORM DATA FIELD EXPLANATION

1. Individual ID #. Please provide if known; an established membership number stays with the member as they change school districts.

2. Member name and address.

3. Last four SSN. This helps to eliminate duplicate records and match members that may have worked in other districts.

4. Landline and cell telephone numbers.

5. Home e-mail address.

6. Name of local association, please write in full local name.

7. Employer/school district.

8. Date of hire/primary employer; if a member works at two different locations, please indicate the primary place of employment.

9. Job Title, for example – classroom teacher, counselor, etc.

10. School/work site to which the member is assigned.

11. Membership category. Categories are based on percentage of teaching, please refer to the membership dues structure on page 36.

12. General Fund Allocation and Independent Expenditure – members may opt not to have a portion of dues allocated for political purposes.

13. NEA Fund For Children and Public Education, a voluntary contribution; used to fund candidates for public office who support quality public education. Please see page 29 for more explanation.

14. Membership Authorization to join all three levels of the unified organizations, authorize payroll deductions, and authorize the maintenance of dues from year to year.

15. Member must sign and date form.

16. Demographic information; see reverse side. This entire section is optional.

17. Member Survey Questions on how CTA can best support members.

18. More information regarding cell phone usage and NEA Fund.

CALIFORNIA TEACHERS ASSOCIATION | NATIONAL EDUCATION ASSOCIATION

MEMBERSHIP ENROLLMENT FORM CERTIFICATED

Your Advocate. Your Partner. Your CTA.

Thank you for choosing a career in education. While it's personally rewarding, it's also professionally demanding. That's why NEA, CTA and your local association will provide you the support you need to be great at what you do. Being a member connects you with other educators. Together, we've been the most powerful voice for students and public education in California since 1863. And together, we still are. ***We do this by:***

- ☑ Negotiating fair salaries, health care and other benefits
- ☑ Leading student-centered educational improvements
- ☑ Supporting your professional practice with conferences, workshops, grants and scholarships
- ☑ Improving learning and working conditions
- ☑ Enhancing and defending your professional rights
- ☑ Providing cost-saving benefits designed just for educators

PERSONAL INFORMATION

CTA Membership ID (If Known) 1

First Name _____ MI _____

Last Name _____

2

Home Address _____

_____ Apt _____

City _____

State _____ Zip _____ Last 4 of SSN 3

Land Line _____

4

Cell Phone* _____

** See reverse for information*

Home Email 5

MEMBERSHIP INFORMATION

Local Association 6

Employer/ School District 7

Hire Date 8 Primary Employer? ☐ Yes ☐ No

If no, list employer _____

Job Title 9

Building/ Work Site 10

TEACHING ASSIGNMENT INFORMATION

11

- ☐ Category 1 — 61% - 100%
- ☐ Category 2A — 33 1/3% - 50%
- ☐ Category 2B — 51% - 60%
- ☐ Category 3A — 25% or less
- ☐ Category 3B — 26%- 33 1/3%
- ☐ Category 4 — Adult Ed Hourly

All CTA dues include a $20 voluntary contribution per year to help fund CTA advocacy efforts and fund the CTA Foundation for Teaching and Learning, which provides scholarships to members and supports teacher-led efforts to improve public schools. To opt out of the voluntary contribution, complete a Voluntary Contribution Change Form. Forms are available at www.cta.org/contribution, from your local membership contact or via email at membership@cta.org.

CTA/ABC AND INDEPENDENT EXPENDITURE ALLOCATION AUTHORIZATION *(Optional)*

12

Designated portions of CTA dues are allocated to the Association for Better Citizenship (CTA/ABC) and to Independent Expenditures (IE) through which CTA provides financial support for education-related issues (CTA/ABC) and CTA-endorsed bipartisan candidates for local and state offices (CTA/ABC and IE).

☐ Please indicate if you choose not to allocate a portion of your dues to the CTA/ABC and the IE account and want all your dues to remain in the general fund.

NEA FUND DEDUCTION AUTHORIZATION *(Optional)*

13

I agree to contribute $_____ annually to the NEA Fund. The NEA Fund for Children and Public Education (NEA Fund) collects voluntary contributions from Association members and uses these contributions for political purposes, including, but not limited to, making contributions to and expenditures on behalf of friends of public education who are candidates for federal office. ** See reverse for more information.

MEMBERSHIP, DUES PAYMENT AND DUES DEDUCTION AUTHORIZATION

14

YES, I want to join with my fellow employees and be a committed member of the Local Association, the California Teachers Association (CTA), and the National Education Association (NEA). I hereby request and voluntarily accept membership in these associations and agree to abide by the Constitution and Bylaws of all three associations, as they may be amended from time to time. I support the Local Association in its role as my exclusive representative in collective bargaining over wages, hours, and other terms and conditions of employment.

I hereby (1) agree to pay annual dues uniformly required for membership in the Local, CTA, and NEA; and (2) request and authorize my Employer to deduct from my pay in each pay period, and transmit to CTA or its designated agent, a pro rata portion of the annual dues required for membership in the Local, CTA, and NEA, unless I pay dues by check. I fully understand that the dues required for membership in the three associations are subject to periodic change by the associations' governing bodies and authorize dues payment on a continuing basis, and regardless of my membership status, unless my obligation to do so ends under one of the circumstances below. This agreement to pay dues continues from year to year, regardless of my membership status, unless: I revoke it by sending written notice via U.S. mail to CTA Member Services, P.O. Box 4178, Burlingame, CA 94011, not less than thirty (30) days and not more than sixty (60) days before the annual anniversary date of this agreement; my employment with the Employer ends; or as otherwise required by law.

Member Signature 15 Date _____

CTA MEMBERSHIP DEPARTMENT COPY

See Reverse

DEMOGRAPHIC INFORMATION *(Optional)*

Ethnicity

16

- ☐ African American
- ☐ American Indian/ Alaska Native
- ☐ Asian
- ☐ Caucasian
- ☐ Hispanic
- ☐ Multi-Ethnic
- ☐ Native Hawaiian/ Pacific Islander
- ☐ Other
- ☐ Unknown

Gender

- ☐ Female
- ☐ Male
- ☐ Non-Binary

Birthdate _____
(mm/dd/yyyy)

Social Media Used:

- ☐ Instagram
- ☐ Facebook
- ☐ Pinterest
- ☐ Twitter

HOW CAN WE BEST SUPPORT YOU? *(Optional)*

1. **What year did you enter the profession?** _____

2. **I am:**
   - ☐ Already a Member
   - ☐ Joining the Association today
   - ☐ Transferring from another district
   - ☐ Interested in receiving more information about membership

3. **Our Association provides resources and support to educators to ensure student success. How can we help you in your career and practice as an educator?**

17

- ☐ Student Behavior / Classroom Management
- ☐ Access to Mentors and/or Coaches
- ☐ Working with Administrators
- ☐ Curriculum Assistance
- ☐ Working with Parents
- ☐ Understanding Your Evaluation / Observation Process

4. **Our Association works to ensure every school provides our students with the opportunities to succeed. Which of the following issues are most important to you?**
   - ☐ Social and Racial Justice
   - ☐ Economic Justice
   - ☐ Parental and Community Engagement
   - ☐ Fully Funded Schools
   - ☐ Conditions in the Workplace
   - ☐ Education Policy - *policy that impacts your school at the local, state or national level*
   - ☐ Political Advocacy - *advocate for policies that ensure all students get the opportunities they deserve*

5. **Our Association advocates for conditions that retain high-quality educators for students. Which of these are you interested in learning about?**
   - ☐ Compensations & Contracts
   - ☐ Educator Rights & Responsibilities
   - ☐ Health Care & Insurance
   - ☐ Pension & Retirement Benefits
   - ☐ Student Debt
   - ☐ Stretching Your Paycheck

MORE INFORMATION

18

*By providing my phone number, I understand that the NEA and its affiliates including CTA, the Local, NEA Member Benefits, and NEA360 may use automated calling technologies and/or text message me on my cellular phone on a periodic basis. NEA and its affiliates will never charge for text message alerts. Carrier message and data rates may apply to such alerts. Text STOP in response to an NEA, CTA or Local text message to stop receiving the association's messages.

**Only U.S. citizens or lawful permanent residents may contribute to the NEA Fund. Contributions to the NEA Fund are voluntary; making a contribution is neither a condition of employment nor membership in the Association, and members have the right to refuse to contribute without suffering any reprisal. Although the NEA Fund requests an annual contribution of $50, this is only a suggestion. A member may contribute more or less than the suggested amount, or may contribute nothing at all, without it affecting his or her membership status, rights or benefits in NEA or any of its affiliates. Contributions to the NEA Fund are not deductible as charitable contributions for federal income tax purposes. Federal law requires political committees to report the name, mailing address, occupation, and name of employer for each individual whose contributions aggregate in excess of $200 in a calendar year.

CCA

ENROLLMENT FORM DATA FIELD EXPLANATION

1. Individual ID#. Please provide if known; an established membership number stays with the member as they change school districts.

2. Member name and address.

3. Last four SSN. This helps to eliminate duplicate records and match members that may have worked in other districts.

4. Landline and cell telephone numbers.

5. Home E-mail address.

6. Name of local association, please write in full local name.

7. Employer/school district.

8. Date of hire/primary employer; if a member works at two different locations, please indicate the primary place of employment.

9. Job Title, for example – professor, faculty, etc.

10. Campus/Center to which the member is assigned.

11. Membership category. Categories are based on percentage of teaching, please refer to the membership dues structure on page 37.

12. General Fund Allocation and Independent Expenditure – members may opt not to have a portion of dues allocated for political purposes.

13. NEA Fund For Children and Public Education, a voluntary contribution, used to fund candidates for public office who support quality public education. Please see page 29 for more explanation.

14. Membership Authorization to join all three levels of the unified organizations, authorize payroll deductions, and authorize the maintenance of dues from year to year.

15. Member must sign and date form.

16. Demographic information; see reverse side. This entire section is optional.

17. Member Survey Questions on how CTA can best support members.

18. More information regarding cell phone usage and NEA Fund.

CALIFORNIA TEACHERS ASSOCIATION | NEA NATIONAL EDUCATION ASSOCIATION | CCA COMMUNITY COLLEGE ASSOCIATION

MEMBERSHIP ENROLLMENT FORM CCA

Your Advocate. Your Partner. Your CTA.

Thank you for choosing a career in education. While it's personally rewarding, it's also professionally demanding. That's why NEA, CTA and your local association will provide you the support you need to be great at what you do. Being a member connects you with other educators. Together, we've been the most powerful voice for students and public education in California since 1863. And together, we still are. ***We do this by:***

- ☑ Negotiating fair salaries, health care and other benefits
- ☑ Leading student-centered educational improvements
- ☑ Supporting your professional practice with conferences, workshops, grants and scholarships
- ☑ Improving learning and working conditions
- ☑ Enhancing and defending your professional rights
- ☑ Providing cost-saving benefits designed just for educators

PERSONAL INFORMATION

CTA Membership ID (If Known) 1 _____

First Name _____ MI _____

Last Name _____

Home Address 2 _____

_____ Apt _____

City _____

State _____ Zip _____ Last 4 of SSN 3 _____

Land Line _____

Cell Phone* 4 _____

** See reverse for information*

Home Email 5 _____

MEMBERSHIP INFORMATION

Local Association 6 _____

Employer/ College District 7 _____

Hire Date 8 _____ Primary Employer? ☐ Yes ☐ No

Additional employer _____

Job Title 9 _____

Campus/ Center 10 _____

FACULTY ASSIGNMENT INFORMATION

☐ Category 1 Full-Time ☐ Category 4 Part-Time or Hourly 11

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CTA/ABC AND INDEPENDENT EXPENDITURE ALLOCATION AUTHORIZATION *(Optional)*

12 Designated portions of CTA dues are allocated to the Association for Better Citizenship (CTA/ABC) and to Independent Expenditures (IE) through which CTA provides financial support for education-related issues (CTA/ABC) and CTA-endorsed bipartisan candidates for local and state offices (CTA/ABC and IE).

☐ Please indicate if you choose not to allocate a portion of your dues to the CTA/ABC and the IE account and want all your dues to remain in the general fund.

NEA FUND DEDUCTION AUTHORIZATION *(Optional)*

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MEMBERSHIP, DUES PAYMENT AND DUES DEDUCTION AUTHORIZATION

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I hereby (1) agree to pay annual dues uniformly required for membership in the Local, CTA, and NEA; and (2) request and authorize my Employer to deduct from my pay in each pay period, and transmit to CTA or its designated agent, a pro rata portion of the annual dues required for membership in the Local, CTA, and NEA, unless I pay dues by check. I fully understand that the dues required for membership in the three associations are subject to periodic change by the associations' governing bodies and authorize dues payment on a continuing basis, and regardless of my membership status, unless my obligation to do so ends under one of the circumstances below. This agreement to pay dues continues from year to year, regardless of my membership status, unless: I revoke it by sending written notice via U.S. mail to CTA Member Services, P.O. Box 4178, Burlingame, CA 94011, not less than thirty (30) days and not more than sixty (60) days before the annual anniversary date of this agreement; my employment with the Employer ends; or as otherwise required by law.

Member Signature 15 _____ Date _____

CTA MEMBERSHIP DEPARTMENT COPY

See Reverse

DEMOGRAPHIC INFORMATION *(Optional)*

16

Ethnicity

- ☐ African American
- ☐ American Indian/ Alaska Native
- ☐ Asian
- ☐ Caucasian
- ☐ Hispanic
- ☐ Multi-Ethnic
- ☐ Native Hawaiian/ Pacific Islander
- ☐ Other
- ☐ Unknown

Gender

- ☐ Female
- ☐ Male
- ☐ Non-Binary

Birthdate _____
(mm/dd/yyyy)

Social Media Used:

- ☐ Instagram
- ☐ Facebook
- ☐ Pinterest
- ☐ Twitter

HOW CAN WE BEST SUPPORT YOU? *(Optional)*

17

1. **Date of Hire? (Year)** _____

2. **What issues are most important to you?**

- ☐ Academic Freedom
- ☐ Campus Safety
- ☐ Job Security
- ☐ Office Space & Resources
- ☐ Promotion & Tenure
- ☐ Shared Governance
- ☐ Wages & Benefits

3. **Our Association works to ensure every school provides students with opportunities to succeed. Which of the following issues are most important to you??**

- ☐ Social and Racial Justice
- ☐ Economic Justice
- ☐ Conditions in the Workplace
- ☐ Education Policy - *policy that impacts your college/university at the local, state or national level*
- ☐ Political Advocacy - *advocate to ensure that all students get the opportunities they deserve*

4. **Our Association advocates for conditions that retain high-quality faculty and staff. Which of the following are you interested in learning about?**

- ☐ Compensations & Contracts
- ☐ Health Care & Insurance
- ☐ Pension & Retirement Benefits
- ☐ Student Debt
- ☐ Stretching Your Paycheck

MORE INFORMATION

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EDUCATION SUPPORT PROFESSIONALS

ENROLLMENT FORM DATA FIELD EXPLANATION

1. Individual ID#. Please provide if known; an established membership number stays with the member as they change school districts.

2. Member name and address.

3. Last four SSN. This helps to eliminate duplicate records and match members that may have worked in other districts.

4. Landline and cell telephone numbers.

5. Home E-mail address.

6. Name of local association, please write in full local name.

7. Employer/school district.

8. Date of hire/primary employer; if a member is at two different locations, please indicate the primary place of employment.

9. Job Title, example secretary, aide, bus driver, etc.

10. School/work site to which the member is assigned.

11. Membership category. Categories are based on annual salary, please refer to the membership dues structure on page 38.

12. General Fund Allocation and Independent Expenditure – members may opt not to have a portion of dues allocated for political purposes.

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15. Member must sign and date form.

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17. Member Survey Questions on how CTA can best support members.

18. More information regarding cell phone usage and NEA Fund.

CALIFORNIA TEACHERS ASSOCIATION | NATIONAL EDUCATION ASSOCIATION

MEMBERSHIP ENROLLMENT FORM ESP

Your Advocate. Your Partner. Your CTA.

Thank you for choosing a career in education. While it's personally rewarding, it's also professionally demanding. That's why NEA, CTA and your local association will provide you the support you need to be great at what you do. Being a member connects you with other educators. Together, we've been the most powerful voice for students and public education in California since 1863. And together, we still are. ***We do this by:***

- ☑ Negotiating fair salaries, health care and other benefits
- ☑ Leading student-centered educational improvements
- ☑ Supporting your professional practice with conferences, workshops, grants and scholarships
- ☑ Improving learning and working conditions
- ☑ Enhancing and defending your professional rights
- ☑ Providing cost-saving benefits designed just for educators

PERSONAL INFORMATION

CTA Membership ID (If Known) 1 _____

First Name _____ MI _____

Last Name 2 _____

Home Address _____

_____ Apt _____

City _____

State _____ Zip _____ Last 4 of SSN 3 _____

Land Line _____

Cell Phone* 4 _____

** See reverse for information*

Home Email 5 _____

MEMBERSHIP INFORMATION

Local Association 6 _____

Employer/ School District 7 _____

Hire Date 8 _____ Primary Employer? ☐ Yes ☐ No

If no, list employer _____

Job Title 9 _____

Building/ Work Site 10 _____

ANNUAL SALARY CATEGORY

11 (see CTA ESP DUES SCHEDULE)

☐ ESP Category 1 ☐ ESP Category 2 ☐ ESP Category 3

☐ ESP Category 4 ☐ ESP Category 5

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Member Signature 15 _____ Date _____

CTA MEMBERSHIP DEPARTMENT COPY

See Reverse

DEMOGRAPHIC INFORMATION *(Optional)*

16

Ethnicity

- ☐ African American
- ☐ American Indian/ Alaska Native
- ☐ Asian
- ☐ Caucasian
- ☐ Hispanic
- ☐ Multi-Ethnic
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- ☐ Other
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Gender

- ☐ Female
- ☐ Male
- ☐ Non-Binary

Birthdate _____
(mm/dd/yyyy)

Social Media Used:

- ☐ Instagram
- ☐ Facebook
- ☐ Pinterest
- ☐ Twitter

HOW CAN WE BEST SUPPORT YOU? *(Optional)*

17

1. **What year did you enter the profession?** _____

2. **I am:**
   - ☐ Already a Member
   - ☐ Transferring from another district
   - ☐ Joining the Association today
   - ☐ Interested in receiving more information about membership

3. **Our Association provides resources and support to members to ensure student success. What areas of support would be most useful to help you and your students succeed?**
   - ☐ Student Behavior / Classroom Management
   - ☐ Access to Mentors and/or Coaches
   - ☐ Meeting the Needs of Students in Poverty
   - ☐ Student Bullying and Suicide
   - ☐ Child Nutrition
   - ☐ Whole Student Education Tools
   - ☐ Communications & Advocacy Training

4. **Our Association works to ensure every school provides our students with the opportunities to succeed. Which of the following issues are most important to you?**
   - ☐ Social and Racial Justice
   - ☐ Economic Justice
   - ☐ Parental and Community Engagement
   - ☐ Fully Funded Schools
   - ☐ Conditions in the Workplace
   - ☐ Education Policy - *policy that impacts your school at the local, state or national level*
   - ☐ Political Advocacy - *advocate for policies that ensure all students get the opportunities they deserve*

5. **Our Association advocates for conditions that retain high-quality educators for students. Which of these are you interested in learning about?**
   - ☐ Wages & Benefits
   - ☐ College Affordability (continuing your education)
   - ☐ Educator Rights & Responsibilities
   - ☐ Health Care & Insurance
   - ☐ Pension & Retirement Benefits
   - ☐ Privatization/Outsourcing
   - ☐ Stretching Your Paycheck

MORE INFORMATION

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MEMBERSHIP TRANSMITTAL FORM

The transmittal form should accompany all transactions involving new payroll members and cash renewals. (See sample on page 25) Transmittal forms are your record of membership forms sent to Membership Accounting. You should retain a copy for your local association file.

PAYROLL

1. Fill in name of local association, date and assign a transmittal number. Indicate the month the first deduction will be taken by your district payroll.

2. List members in alphabetical order, check category placement box and indicate voluntary contributions with a check mark under the appropriate organizations. Write the monthly payroll deduction amount in the total column.

3. Send transmittal form with accompanying enrollments to CTA Membership Accounting on a weekly basis. **DO NOT HOLD FORMS**.

CASH

1. Use a separate transmittal form for cash members. Include local's check for full payment of CTA/NEA dues and any voluntary contributions. **Retain local portion of dues**.

2. Fill in name of local association, date and assign a transmittal number. Indicate if member is renewing or is a new cash payer.

3. Check appropriate category and show total cash payment received.

4. Retain local dues, and write a check payable to CTA for the remaining dues and contributions collected for all cash members listed.

5. Send transmittal forms with accompanying enrollments and checks to CTA Membership Accounting on a weekly basis. **DO NOT HOLD FORMS.**

MEMBERSHIP TRANSMITTAL FORM (FOR NEW ENROLLMENTS AND CASH PAYMENTS)

THIS FORM IS FOR REMITTING COMPLETED ENROLLMENT FORMS AND CASH MEMBERSHIP DUES.
DO NOT USE FOR REMITTING MONTHLY PAYROLL DUES DEDUCTIONS.

FROM: _____ DATE: _____ TRANSMITTAL # _____ PAYROLL ☐
(Local Name) (Assigned by Local)

BY: _____ ( ) _____ CASH ☐
(Name of person completing the form) (Area Code) (Phone #)

TITLE: _____ E-Mail: _____

NAME (List Alphabetically)	PAYROLL	CASH RENEW	NEW CASH	CTA ACTIVE CATEGORIES 1	2	3	4	CTA ISSUES PAC	NEA FCPE	DIS. RELIEF	CC/MLK	GLBT	Month Deduction Begins	Monthly P/R Deduction Amount	Cash
1														$	$
2															
3															
4															
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															
19															

COMPLETE ONLY IF REMITTING CASH MEMBERSHIP DUES →

TOTAL CASH	
LESS DUES (retained by Local)	
TOTAL REMITTED TO CTA	$

IMPORTANT NOTE !!! A DUPLICATE OF THIS COMPLETED MEMBERSHIP FORM SHOULD BE RETAINED AT THE LOCAL ASSOCIATION OFFICE FOR INCLUSION IN THE TOTAL MEMBERSHIP RECORDS. MAKE SURE YOU MATCH THIS RECORD WITH THE MEMBERSHIP FORMS SUBMITTED.

CTA Membership Accounting Department, P.O. Box 4178, Burlingame, California 94011-4178

5/08

PAYROLL DUES REMITTANCE INSTRUCTIONS

PAYROLL DUES REMITTANCE PROCEDURES

CTA maintains a Dues Transmittal Program through which the majority of membership dues are received and processed. Locals or school districts complete a transmittal form (pre-coded with the local information) which will accompany their monthly dues warrant. Payments are then remitted to the designated post office box, resulting in more timely receipt of deposit. Use pre-addressed envelopes provided.

Remittance instructions are as follows:

A set of pre-coded transmittals with your local/district's identification name and number is provided to each local/district. With each remittance, complete one of the transmittal forms by coding the total remittance amount in the space, "***Total Amount."*** If you are sending *more than one* warrant, the *total of all* warrants should be entered in that space. Refer to sample below.

CALIFORNIA TEACHERS ASSOCIATION
20XX-20XX Payroll Dues Transmittal
Membership Accounting Department
P.O. Box 45529, San Francisco, CA 94145-0529

Staff Code	Acct. Yr	ID #	Local Name		Total Amount
AC	**XX**	**0990**	**HAPPY VALLEY TCHRS ASSN**		

Please Enter Amount Enclosed

☐ ADDITIONAL FORMS ☐ MORE ENVELOPES ☐ Small ☐ Large

Requestor: Phone #

Address:

Comments:

Note: All payroll deductions are required to be sent to the San Francisco address.

If you are currently sending back-up (i.e., vendor listing, payroll remittance advice, etc.) relating to the transmittal amount, continue to do so.

Use the comments line to provide us with any information we should be aware of or to request additional materials.

All locals/school districts will receive instructions and forms in August, prior to the September payroll deduction. If you have questions or concerns, please call the Membership Accounting Department.

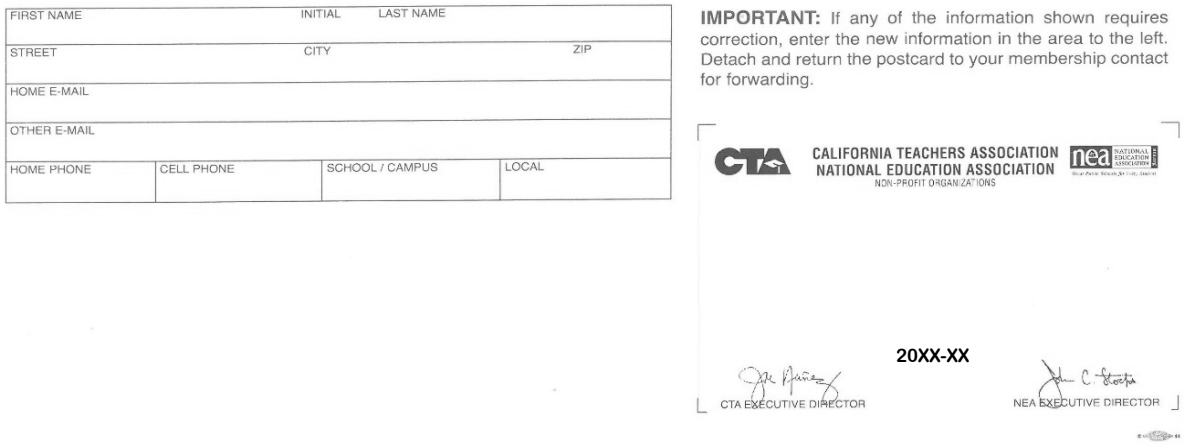
NAME AND ADDRESS CHANGE FORMS

Inaccurate addresses are costly to CTA, NEA and the local and may cause an interruption of publications and other services to members. We encourage you to provide CTA/NEA timely notification of name/address and other data changes which affect your members.

Currently, there are three methods of communicating these updates to the Membership Accounting Department: (1) returning the carrier strip of the membership card, (2) returning corrected rosters, or (3) using CTA 360 or CTA 360Pro to make the updates locally.

(1) CARRIER STRIP OF MEMBERSHIP CARD

Have the member check the information printed on the carrier strip and update as necessary.



FIRST NAME	INITIAL	LAST NAME	
STREET	CITY		ZIP
HOME E-MAIL			
OTHER E-MAIL			
HOME PHONE	CELL PHONE	SCHOOL / CAMPUS	LOCAL

IMPORTANT: If any of the information shown requires correction, enter the new information in the area to the left. Detach and return the postcard to your membership contact for forwarding.

CALIFORNIA TEACHERS ASSOCIATION
NATIONAL EDUCATION ASSOCIATION
NON-PROFIT ORGANIZATIONS

20XX-XX

CTA EXECUTIVE DIRECTOR

NEA EXECUTIVE DIRECTOR

(2) VERIFICATION ROSTERS (November and March)

The Membership Chairperson can apprise CTA of changes through notations made on the rosters.

CTA MEMBERSHIP ROSTER 20XX—20XX

Page 1 of 10
Run By: STAFF
Run Date: XX/XX/20XX

SAMPLE TCHRS ASSN—1234
SAMPLE UNIFIED

MEMBER NAME CONTACT ID SSN4 WORK LOCATION	ADDRESS CITY STATE ZIP TELEPHONE EMAIL	PRINT ALL UPDATES/NOTES IN THIS AREA	STATUS DED ENROLL DATE	NEA CAT CTA CAT LEA CAT CCA CAT	NEA DUES CTA DUES LEA DUES CCA DUES	ABC OPT OUT AND/OR VOL CONT	DUES TOTAL AMT/PR DED
ABBOT, ABIGAIL 0001235487 4765 TEST ELEMENTARY	123 TESTING AVE TEST CITY, CA 94066 (555)555-1234 TEST@XXXX.COM	_____ _____ _____	ACTIVE 10 09/01/2013	61% - 100% 61% - 100% 61% - 100%	$$$.$$ $$$.$$ $$$.$$		$$$.$$ $$.$$

(3) CTA 360 AND CTA 360Pro FOR LEADERS

CTA 360 and CTA 360Pro are useful tools available for local leaders. The tools are integrated – an addition or update of member information in one tool is reflected in the other. These tools can greatly assist local leaders in member engagement and organizing activities. The tools provide an alternative to updating member demographic information on a roster by allowing a leader to update member demographics through the mobile application or via a web browser.

CTA 360 – a mobile app available for local leaders provides the ability to search, view and update member and non-member data within the local, add new members, convert non-members to active members, as well as view local organization information. Leaders can also use CTA 360 to complete the member survey to identify the important priorities of our new members. Understanding their needs will assist in engaging members as we look to the future.

Newly added Counts report provides counts of members and non-members, with detail by work location. Also, a Survey report provides counts and graphic display of new active members that have completed the New Member Survey, and those that have yet to be contacted for easy follow-up.

Training is available on these tools at CTA Conferences or via web-based videos. Completion of a security authorization form with local president approval is required before credentials for access are issued to users. Visit www.CTAGo.org/CTA360 to get access.

CTA 360Pro – CTA 360Pro is the desktop/laptop access point for local leaders to access CTA's Association Management System. The system is similar to the CTA 360 app with enhanced reporting functionality.

Users can search and view local member data, update member demographics and work locations, view and update local leaders and request membership cards.

Some of the additional reports local leaders will have access to are: full roster of members, building lists, mailing labels, leadership rosters, voter rosters, and more. To get access to CTA 360Pro; visit www.CTAGo.org./CTA360Pro.

THE NEA FUND FOR CHILDREN AND PUBLIC EDUCATION

The NEA Fund is the National Education Association Fund for Children and Public Education. The contributions received from NEA members are used to fund candidates for public office who support quality public education.

The NEA Fund Council consists of representatives from every NEA state affiliate. It meets throughout the year to decide which candidates to endorse and to determine campaign funding. In California, CTA endorses candidates recommended by locals from the electoral district. Candidates are interviewed by teachers to determine where they stand on education issues.

Suggested contribution to the NEA Fund is $50.00.

TRANSMITTAL OF THE NEA FUND CONTRIBUTIONS

A. Individual NEA Fund contributions of more than $50.00 must be received by the CTA Membership Accounting Department within 5 days of receipt by the Local, Service Center Council, or any person collecting NEA Fund contributions.

B. Individual NEA Fund contributions of $50.00 or less must be received by the CTA Membership Accounting Department, within 15 days of receipt by the Local, Service Center Council, or any person collecting NEA Fund contributions.

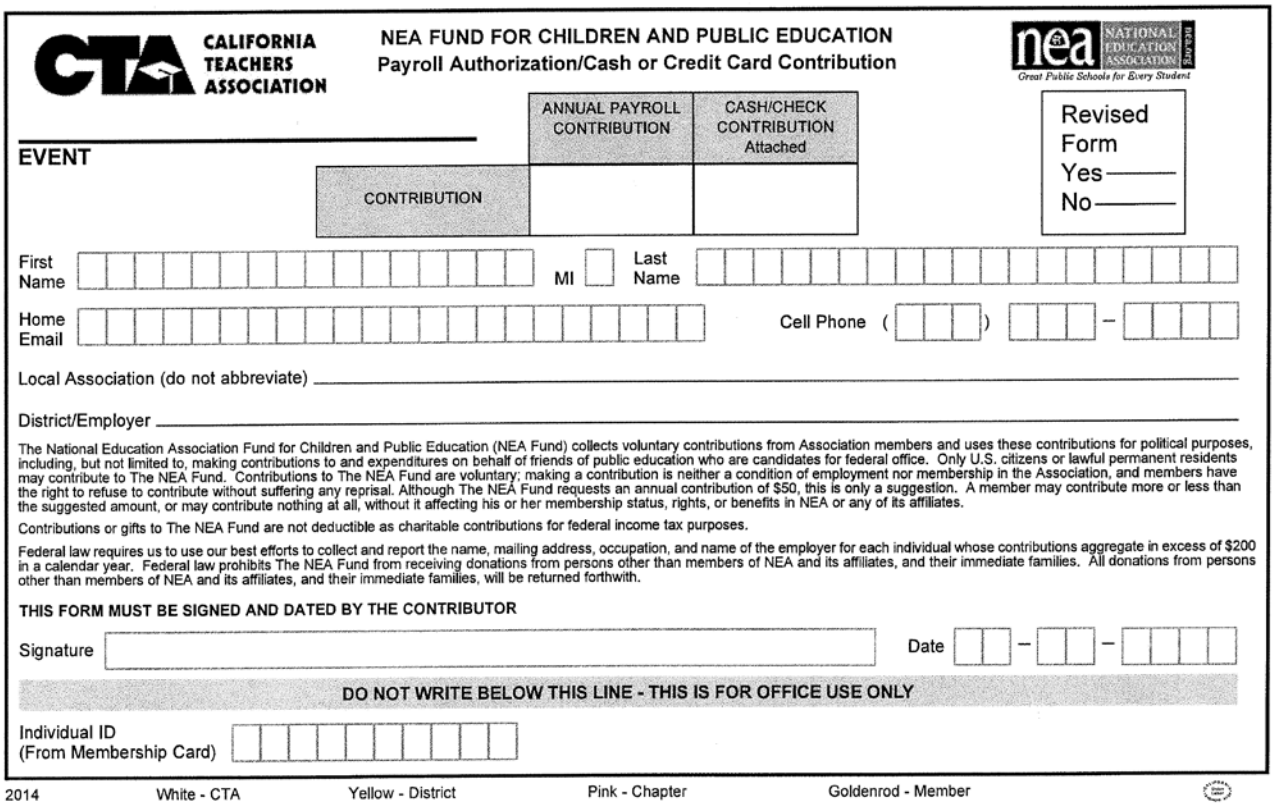
C. Contributions transmitted must be accompanied by a copy of the appropriate form (enrollment or supplemental authorization).

D. The NEA Fund payroll contributions that are commingled with dues money must be separated and deposited into an approved NEA Fund account. Therefore, all locals which received payroll deductions from the school district for remittance to CTA **MUST IMMEDIATELY** remit the money to the CTA Membership Accounting Department upon receipt from the school district. The Membership Accounting Department will separate the money immediately and deposit it in the NEA Fund account. NEA Fund contributions may not remain with dues money in an account that earns interest of any kind for the Association for even one day.

E. Guidelines for local associations who conduct The NEA Fund drives/campaigns are available through the Governmental Relations Department.

Please Note:

Because of FEC (Federal Elections Commission) regulations, NEA Fund contributions not transmitted within the specified timelines become "soft", that is, the funds cannot be used for political contributions, only for administrative purposes (postage, stationery, etc.).



CALIFORNIA TEACHERS ASSOCIATION

NEA FUND FOR CHILDREN AND PUBLIC EDUCATION
Payroll Authorization/Cash or Credit Card Contribution

NEA NATIONAL EDUCATION ASSOCIATION — Great Public Schools for Every Student

EVENT

	ANNUAL PAYROLL CONTRIBUTION	CASH/CHECK CONTRIBUTION Attached
CONTRIBUTION		

Revised Form Yes ——— No ———

First Name | MI | Last Name

Home Email | Cell Phone ( ) –

Local Association (do not abbreviate) _____

District/Employer _____

The National Education Association Fund for Children and Public Education (NEA Fund) collects voluntary contributions from Association members and uses these contributions for political purposes, including, but not limited to, making contributions to and expenditures on behalf of friends of public education who are candidates for federal office. Only U.S. citizens or lawful permanent residents may contribute to The NEA Fund. Contributions to The NEA Fund are voluntary; making a contribution is neither a condition of employment nor membership in the Association, and members have the right to refuse to contribute without suffering any reprisal. Although The NEA Fund requests an annual contribution of $50, this is only a suggestion. A member may contribute more or less than the suggested amount, or may contribute nothing at all, without it affecting his or her membership status, rights, or benefits in NEA or any of its affiliates.

Contributions or gifts to The NEA Fund are not deductible as charitable contributions for federal income tax purposes.

Federal law requires us to use our best efforts to collect and report the name, mailing address, occupation, and name of the employer for each individual whose contributions aggregate in excess of $200 in a calendar year. Federal law prohibits The NEA Fund from receiving donations from persons other than members of NEA and its affiliates, and their immediate families. All donations from persons other than members of NEA and its affiliates, and their immediate families, will be returned forthwith.

THIS FORM MUST BE SIGNED AND DATED BY THE CONTRIBUTOR

Signature | Date – –

DO NOT WRITE BELOW THIS LINE - THIS IS FOR OFFICE USE ONLY

Individual ID (From Membership Card)

2014 White - CTA Yellow - District Pink - Chapter Goldenrod - Member

When a member has completed the NEA Fund contribution form, please review to be sure that:

1. The member has completed the form legibly and completely.

2. The member has signed and dated the form.

3. If the contribution is in cash, it is transmitted, along with top copy of the form to CTA Membership Accounting in a timely manner as outlined in the previous section on transmittal of The NEA Fund contributions.

4. If the contribution is through payroll deduction, the authorization is submitted to the district office as soon as possible, and the district office is informed 1) that this replaces all previous authorizations for The NEA Fund and not an addition to current NEA Fund deductions, and 2) these are annual amounts. Any contributions received which exceed the amount on the signed authorization will be refunded to the member by the CTA Membership Accounting Department. Be sure to keep the Local Chapter copy of the payroll authorization for your records.

5. The Member Copy is given to the member for his/her records.

NEA Fund contribution forms may be requested from the Membership Accounting Department.

VOLUNTARY DUES CONTRIBUTION

In June 2008, CTA State Council approved a $20 voluntary dues contribution to support CTA advocacy efforts and CTA foundation activities which provide scholarships and grants to members and their children as well as supports the Institute for Teaching. The CTA Foundation for Teaching and Learning is the Board approved name of the foundation. The voluntary dues contribution is a component of the CTA dues. Active members contribute the $20 at each respective dues category. Members may elect to opt out of all or a portion of the $20 by requesting a refund. Existing members may elect to redirect or opt out by November 1st each year. Members will not need to repeat the election process each year, but can change their election each year. New members will have 30 days from becoming members to make an election regarding the voluntary dues amount.

More information regarding the $20 voluntary dues contribution will be available in the September California Educator as well as online at MyCTA at www.cta.org. The member only website, MyCTA, provides an online application members may use to request a refund or redirect the $20 voluntary dues contribution. Additionally, a Voluntary Contribution Change Form will be available through the CTA website.

Questions may be directed to your CTA Membership staff person or to membership@cta.org.

FALCON OUTPUT REQUESTS

CTA 360 and CTA 360Pro provide many standard reports users can generate as needed. Users can export the results or print in standard formats. Mailing labels, building lists, and membership rosters are a few examples of the available reports in CTA 360Pro.

Requests for more complex sets of data can be submitted through the Report Request process. The Report Request form is an interactive PDF file that can be completed online and then emailed to ReportRequest@CTA.org. To receive the PDF file, contact ReportRequest@CTA.org. Before you begin it's important that you save the interactive PDF to your desktop.

- Specify the organization (Local, UniServ or SCC) the request is from and the date the request is made.
- Include requester information and due date. Please allow 1 to 2 weeks lead time to ensure your request can be fulfilled by the desired due date.
- Data Required and Purpose: be as specific as possible for what data fields and membership types are needed. Submit a sample if possible.
- Provide the purpose of how the data will be utilized.
- Approvals are required. Requests will not be completed without necessary approvals. Locals requesting labels or rosters of their respective members can be approved by the local President. To ensure timely processing, obtain approval before submitting request.
- Sort sequence is required.
- Desired Output: provide format and delivery method.
- Note: electronic lists are password protected to ensure the confidentiality of our member's information.
- Save the interactive PDF to your own workspace.
- For follow-up, to make edits to your initial request, or to obtain status of an existing request contact ReportRequest@cta.org.

Send completed and approved report requests to: ReportRequest@cta.org

All Political Campaign Releases should be sent to CTA Governmental Relations. The Membership Accounting Department does not generate election related lists.

FALCON OUTPUT REQUEST

TO: CTA MEMBERSHIP DEPARTMENT
P.O. BOX 4178, BURLINGAME, CA 94011
EMAIL: ReportRequest@CTA.org FAX: 650-552-5061

FROM:	(Specify name)	**REQUESTER INFORMATION**
LOCAL: ☐	_____	NAME: _____
DEPARTMENT: ☐	_____	PHONE: _____
OTHER: ☐	_____	EMAIL: _____
REQUEST DATE:	/ /	DUE DATE: / /

DATA REQUIRED *and* PURPOSE: (ie: All bargaining unit, Active members only, Zip Codes, Data fields needed in output, Local Newsletter email)

APPROVALS:

	Signature	Date
Department Manager:	_____	_____
Region Manager:	_____	_____

SORT SEQUENCE:

	(Please check one)				
☐ ALPHABETIC:	Last Name	First Name	Local/Group Name	Local/Group then First Name	Local/Group then Last Name
☐ ZIP CODE:	Ascending	Descending			
☐ CTA ID:	Ascending	Descending			
☐ OTHER:	Please Specify:				

DESIRED OUTPUT:

	HARD COPY (Printed & Mailed)	# of copies	ELECTRONIC PASSWORD PROTECTED (Email Attachment)	MYFALCON USERS (Query or Report)
☐ MAILING LABELS	Y N	_____	Y N	Y N
☐ ROSTER/LIST	Y N	_____	Y N	Y N
☐ OTHER: _____	Y N	_____	Y N	Y N

NOTE:
PLEASE PROVIDE A SAMPLE IF AVAILABLE

Mail hard copy to:	Mail electronic copy to:	Notify of MyFalcon Availability:
_____	Name: _____	_____
_____	Email: _____	_____
_____	Name: _____	_____
_____	Email: _____	_____

FOR OFFICE USE ONLY

Date Received: _____ Completed by: _____ Completed Date: _____

Query/Report Title: _____ Admin. Use: _____

GENERAL FUND ALLOCATION FORM

CALIFORNIA TEACHERS ASSOCIATION
GENERAL FUND ALLOCATION FORM

Name _____ Last Four Digits SS# _____
Last First M.I.

City _____ State _____ Zip _____

Chapter Name _____ School District_____

I choose not to allocate a portion of my dues to the CTA/ABC (Association for Better Citizenship) or to IE (Independent Expenditures) and want all of my dues to remain in the General Fund.

Signature _____ Date _____
(Please see reverse side)

This form applies to members who choose not to allocate a portion of their CTA dues to CTA/ABC (California Teachers Association/Association for Better Citizenship) or to IE (Independent Expenditures) and instead want it to go to the General Fund.

When completed, the card should be forwarded to the CTA Membership Accounting Department at the address shown below.

Continuing payroll members who allocated the political portion of their CTA dues to the General Fund in prior years **do not** need to complete this form again. Their prior request will be honored.

Forms can be requested from:

CTA Membership Accounting Department
P.O. Box 4178
Burlingame, CA 94011-4178

ADDITIONAL CONTACT INFORMATION / IMPORTANT DATA

SUBJECT:	**CONTACT**:
Dedicated Support Sites for Membership Contacts and Local Leaders	www.CTAGo.org/Membership www.CTAGo.org/CTA360 www.CTAGo.org/CTA360Pro

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Membership forms and materials

MyFalcon – Association Management System

Falcon Data Output Requests

Issues PAC	(650) 552-5278
CTA/NEA Retired Membership	or Membership@cta.org

Cesar Chavez Memorial Education Awards Program/Martin Luther King Jr. Memorial Scholarship Fund/GLBT Safety in Schools

CTA/FACT Disaster Relief Fund

The NEA Fund for Children and Public Education

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Legal Services	Your Regional UniServ Staff
Promotion materials or calendars	CTA Communications (650) 552-5365
Educators Employment Liability Insurance	CTA Legal Department (650) 552-5425
Member Benefits	CTA Member Benefits (650) 552-5200
DUESTAB certification	NEA Member Benefits 1-800-637-INFO

MEMBERSHIP DUES STRUCTURE 2018-19

CATEGORY 1

For those faculty whose teaching assignment is more than 60% of a normal assignment, except for faculty employed as pre-school, head start, child care, adult education, and substitute teachers whose salaries are less than the minimum teacher salary for the district in which they are employed.

State Dues $ 700.00
NEA Dues $ 192.00

CATEGORY 2A

For those faculty whose teaching assignment is greater than 1/3 but not more than 50% of a normal assignment.

State Dues $ 360.00
NEA Dues $ 107.50

CATEGORY 2B

For those faculty whose teaching assignment is greater than 50% but not more than 60% of a normal assignment, or faculty employed as pre-school, head start, child care, adult education, and substitute teachers whose salary in the district in which they are employed is less than the minimum salary paid regular teachers in such district.

State Dues $ 360.00
NEA Dues $ 192.00

CATEGORY 3A

For those faculty or substitutes whose teaching assignment is 25% or less than a normal assignment, including faculty on unpaid leave.

State Dues $ 190.00
NEA Dues $ 65.50

CATEGORY 3B

For those faculty whose teaching assignment is greater than 25% but not more than 1/3 of a normal assignment or those faculty employed in private higher educational institutions or the University of California for whom no representation by the Association in employer-employee relations exists or is immediately contemplated.

State Dues $ 190.00
NEA Dues $ 107.50

CATEGORY 4

For those adult education and community college employees employed only on a part-time/hourly basis.

State Dues $ 88.00
NEA Dues $ 65.50

Notification of Local chapter dues will be provided separately.

NOTE: Those eligible for membership in more than one school district shall be enrolled in their primary place of employment.

CTA dues at each category includes a $20 Voluntary Dues Contribution to support CTA advocacy and the CTA Foundation for Teaching and Learning. Members not wishing to contribute may request a refund.

Voluntary Contribution:
NEA-Fund – suggested amount $ 50.00 - (NEA – Fund for Children and Public Education)

CTA/CCA MEMBERSHIP DUES 2018-19

Dues amounts for UEP ACTIVE membership categories:

CATEGORY 1

For those faculty whose teaching assignment is more than 60% of a normal assignment except for faculty employed as pre-school, head start, child care, adult education, and substitute teachers whose salaries are less than the minimum teacher salary for the district in which they are employed.

State Dues $**799.00**
NEA Dues **$192.00**

CATEGORY 4

For those adult education and community college employees employed only on a part-time/hourly basis.

State Dues $**137.50**
NEA Dues **$ 65.50**

Notification of Local chapter dues will be provided separately.

NOTE: Those eligible for membership in more than one school district shall be enrolled in their primary place of employment.

CTA dues at each category includes a $20 Voluntary Dues Contribution to support CTA advocacy and the CTA Foundation for Teaching and Learning. Members not wishing to contribute may request a refund.

Voluntary Contribution:
NEA-Fund – suggested amount $ 50.00 – (NEA – Fund for Children and Public Education)

CTA EDUCATION SUPPORT PROFESSIONALS

2018-19 DUES SCHEDULE

BASED ON ANNUAL SALARY:

Category 1		
$46,000 and OVER	**State Prof. Dues**	**$ 700.00**
	NEA Prof. Dues	**$ 116.50**
Category 2		
$31,000 - $45,999	**State Prof. Dues**	**$ 360.00**
	NEA Prof. Dues	**$ 116.50**
Category 3		
$20,000 - $30,999	**State Prof. Dues**	**$ 190.00**
	NEA Prof. Dues	**$ 116.50**
Category 4		
$7,000 - $19,999	**State Prof. Dues**	**$ 139.00**
	NEA Prof. Dues	**$ 70.00**
Category 5		
$ 0 - $6,999	**State Prof. Dues**	**$ 88.00**
	NEA Prof. Dues	**$ 46.75**
Associate		
Associate/CASH ONLY	**State Prof. Dues**	**$ 88.00**
	NEA Prof. Dues	**$ 46.75**

Notification of Local chapter dues will be provided separately.

NOTE: Those eligible for membership in more than one school district shall be enrolled in their primary place of employment.

CTA dues at each category includes a $20 Voluntary Dues Contribution to support CTA advocacy and the CTA Foundation for Teaching and Learning. Members not wishing to contribute may request a refund.

Voluntary Contribution:
NEA-Fund - suggested amount $50.00 (NEA – Fund for Children and Public Education)

CRISIS ARBITRATION FUND

For chapters that have a provision in their contract for binding arbitration of grievances by an outside neutral party, CTA will provide up to 50% of the chapter's share of the arbitrator's fees and cost of the transcript up to $2,000 per arbitration as long as the chapter category I dues level meets the CTA procedural requirement. Under extraordinary circumstances due to a lengthy hearing or complex grievance up to an additional fifty (50%) percent of the chapter's share but no more than $1,500 is authorized to be allocated.

The CTA Arbitration Participation Fund procedures state that the chapter must have a local dues (includes UniServ dues) level of at least 30% of the previous year's CTA dues rounded down to the nearest $5.00. The rationale behind the minimum dues requirement is that locals should have dues set at an amount that will allow them to accumulate reserves to cover the cost of arbitrations, since that is a responsibility of the locals as the bargaining agent. UniServ and CCA dues are also included as local dues in the calculation.

The following is an example of the calculation that locals should use to determine the required dues level:

For fiscal year 2018-19:	Educators	ESP (Category 3)
Prior Year (2017-18) CTA Dues	$ 677.00	$ 184.50
Less Advocacy/Foundation	- 20.00	
Less Initiative Fund	- 36.00	
Less Media Fund	- 16.00	
Applicable CTA Dues	$ 605.00	$ 184.50
Multiplied by	30%	30%
Minimum Local Dues Level	$ 181.50	$ 55.35
Rounded *down* to the nearest $5:	$ 180.00	**$ 55.00**
Board Approved Amount at	$ **175.00***	

In general, this does not apply to a grievance procedure which contains a "loser" pay provision.

Also, please be advised that there is no minimum dues requirement to qualify for Crisis Assistance Funding. Please refer to the CTA Policy on Crisis Assistance for further information.

* State Council moved NBI 3/09-29 for immediate action and carried by two-thirds vote at its March 2009 meeting to freeze the minimum Category I dues level local requirement to qualify for the Crisis Arbitration Fund at $150.00 for the 2009-10 and 2010-11 fiscal years**.** At the April 17-18, 2012 and at the April 16-17, 2013 Board meetings, the CTA Board of Directors approved the continuation for the minimum Category I Dues level to qualify for the Crisis Arbitration Fund for 2012-13 and 2013-14, respectively to remain at $150.00. For fiscal year 2014-15, the CTA Board of Directors at its February 2014 meeting approved the raising of the minimum dues amount by $5.00 per year until it is in accordance with the formula.

MEMBERSHIP NOTES

CALIFORNIA
Union
Labor
TEACHERS ASSN