

**WE'RE HAPPY
YOU'RE HERE!**



WELCOME

Utah PTA!

**MEMBERHUB
WELCOME PACKAGE**

*PTA volunteers
are the best.*

You help everyone. We're here to help you.



WELCOME LETTER

Welcome to MemberHub. As a PTA leader, you are part of an amazing army of volunteers. We know it's a challenging job – our company is led by parents of young children who've spent countless nights in school gymnasiums trying to solve the age-old problems facing our schools. How to better engage parents? How to raise more money? How to recruit more volunteers? How to make it easier for your school to coordinate a hundred little things?

We know that running a PTA is hard work. And that's why we started MemberHub. Our software is designed to make the life of PTA leaders like you a little easier – one place where you can manage everything including creating newsletters, managing volunteer signups, processing donations and sales, tracking membership dues, and filing necessary paperwork.

You know your school better than anyone. But we intimately understand the issues that volunteers like you are facing. MemberHub is working with more than 8,000 PTAs across the country to help solve those problems and make their PTAs more successful.

You may be wary about adopting a new software solution. You may already have too much on your plate, or you may not immediately see the value in doing anything different from what you're currently doing. We get that. And that's why we've put together plenty of training and support materials to help make the transition as seamless as possible. On the pages that follow, you will find an overview of MemberHub's benefits, helpful tips shared by other PTA leaders, and a step-by-step guide for getting started.

We can't wait to see how MemberHub helps you and your PTA succeed.

Will Bowen, CEO
MemberHub

GETTING TO KNOW MEMBERHUB

MemberHub is software designed specifically for the PTA! It helps PTA leaders to do their jobs with confidence - using tools to engage families, raise money, and stay in good standing.

[Video: See how Lacy PTA uses MemberHub!](#)

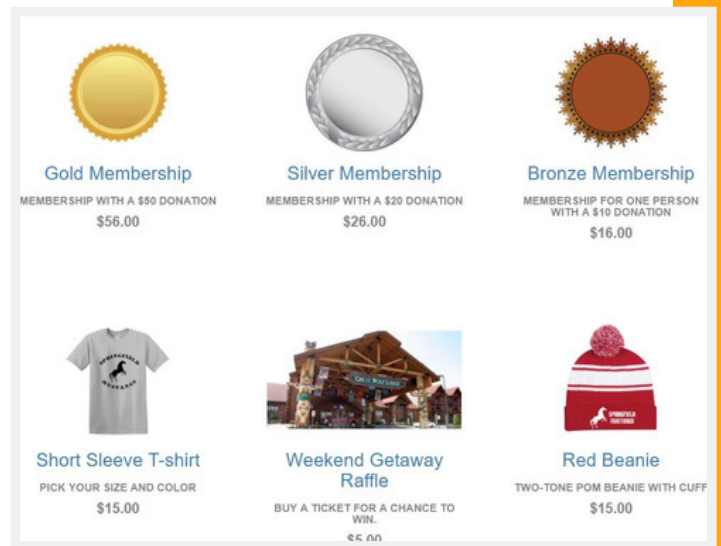


HERE ARE SOME OF MEMBERHUB'S MOST POPULAR FEATURES:

A customized online store that simplifies membership reporting

Sell PTA memberships, spirit wear, and collect donations – all online.

Membership information is **automatically reported** to your state, and members receive an **electronic membership card** in their emailed receipt. Huge time-saver.



The store is very easy to use, and report downloading is easy. ... We collect funds for PTA membership, donations, sport wear, after-school, school festivals. Anything we need."

Katrina Soutar, Thornton Creek Elementary PTA

Tools to better engage families and grow membership.

Keep families in the loop with email and text communication tools, targeted lists, calendars, volunteer signups, file-sharing, and directories.

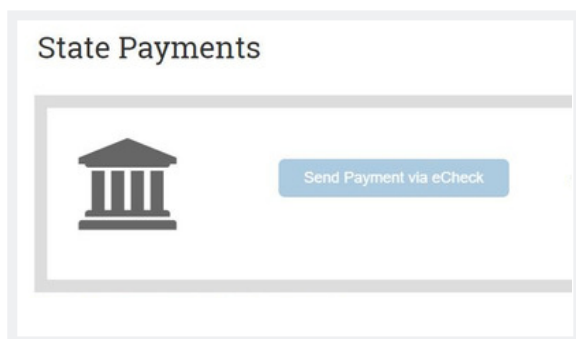
There's no better way to show the value of the PTA all year long.



“

We needed a more effective way to communicate with parents. We were using so many different tools, all cobbled together. It was incredibly confusing for our parents — and difficult for our PTA to know who was getting what information. Now, everyone gets our emails and we have a 60% open rate.”

Holly Hermansson, McKinley Elementary School



It's easy to stay in good standing.

With automated dues remittance, membership reporting and state PTA compliance, MemberHub makes it easy to stay in good standing without spending your valuable time on administrative headaches.

“

What I love the best about MemberHub is that I don't have to run into school constantly to pick up checks and order forms for Science Olympiad, chess or any other after-school program. Parents are taking care of orders, signups, and payments themselves.”

Lori Leneschmidt, Thornton Creek Elementary PTA



YOUR KEYS TO SUCCESS

We've worked with thousands of PTAs across the country and picked up some valuable tips along the way.

Here are some of the best practices to help you make the most of your MemberHub experience.

“

To make MemberHub effective for our parents, we had to give up the crutch of using [other cobbled-together free tools]. At our inception of adopting MH, we had a talk about going all in. ... We went all in."

Lori Leneschmidt, Thornton Creek Elementary PTA

KEYS TO SUCCESS: SEIZE THE MOMENTUM AT KEY TIMES OF YEAR

SPRING 2019 - END OF SCHOOL YEAR: ONBOARD & INTRODUCE

Identify a MemberHub chair for the 2019-2020 school year.

Chairs help make sure your school is successful in MemberHub. They get special access to MemberHub support and help train other leaders, parents, and teachers to use MemberHub.



BONUS! Set up your MemberHub store and do an end-of-year membership drive to build momentum for next year.

Communicate, communicate, communicate! Introduce MemberHub to your school staff and families. Here's a [sample email](#) you can use to introduce and explain the value of your school's new software tools.

SUMMER 2019: LAY THE GROUNDWORK FOR SUCCESS

Stay in touch with families through MemberHub to get them familiar with your new communications tools.

Introduce MemberHub to school administrators and teachers. Then, set up teachers for success! We often see membership chairs, communications chairs/secretaries, and room parents build grade-level and classroom hubs for teachers to easily communicate with their classroom families all year.

Set up your school store to sell memberships and spirit wear, collect donations, and raise money with fundraisers in MemberHub. You'll also want to learn how to submit good standing acknowledgements and remit state dues via ACH.

It's a great idea to get all of this done over the summer so you can hit the ground running when it's time for back-to-school season!

MAKE THE MOST OF BACK-TO-SCHOOL SEASON

Get your [back-to-school playbook](#) with sample letters and fliers! The package of helpful advice includes introducing MemberHub with teacher assignment letters and providing a "join the PTA" flier to families at back-to-school night.



you got this!

AND WE'RE HERE TO HELP

ONBOARDING PLAYBOOK: HOW TO SET UP YOUR PTA IN MEMBERHUB

1. Create your MemberHub account.

- Visit app.memberhub.com
- Enter your email address.
- Choose the second option: "I need to create a password" and enter your first and last name.
- Check your inbox for a confirmation email. Enter the code from the email on the MemberHub site.

2. Activate your site & set the domain name.

- Log in and update your school's MemberHub site address, if prompted. Only the first site admin to log in will need to complete this step. Example: "ABCElementary.MemberHub.com"
- If you don't see an Admin Console button in the upper right, please contact your state PTA.

3. Update/add your officers, if needed.

- Select the Admin Console button in the upper right. You'll be taken to the PTA tab.
- On the right, click Officers.
- If needed, click the Add Officer button on the left under the officer list. In the popup, enter the officer's details and check whether to give them admin rights. Then, click the Add Officer button on the bottom.
- Only your state's PTA-required officer roles are listed here, but you can still give admin access to officers with roles not listed. [Here's how to give them admin rights.](#)

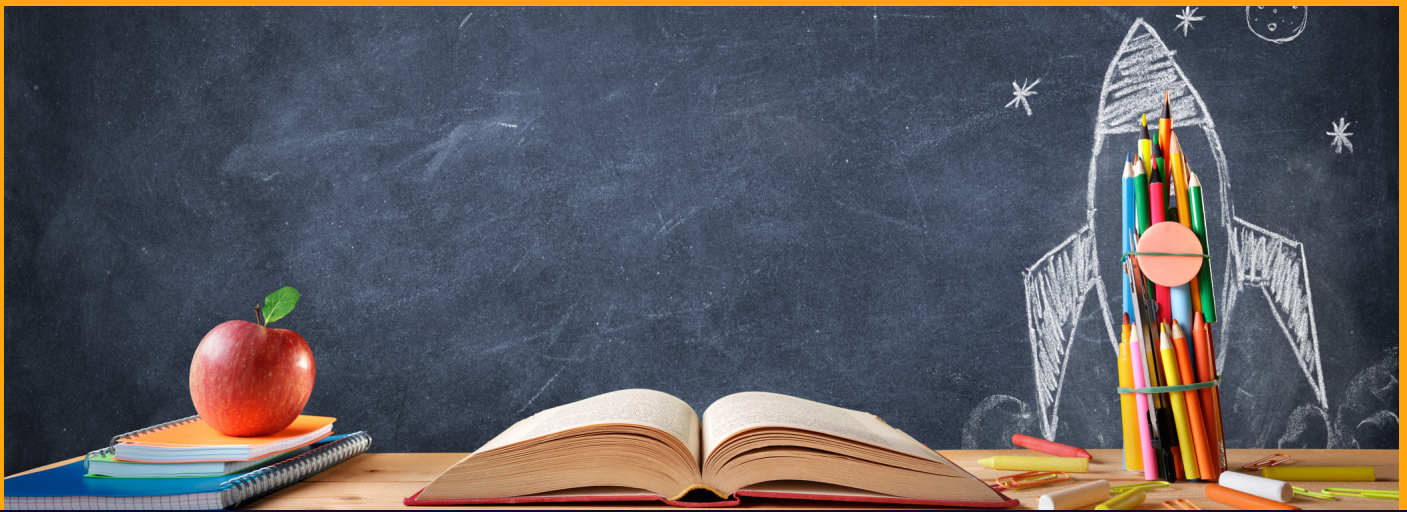
4. Personalize your MemberHub site.

- Go to Admin Console, then Settings.
- Add your school's logo, colors, and social media links.

5. Important: Get set up to take payments online.

This step is important so you can use your e-store to sell memberships, collect donations, sell spirit wear, and more. An authorized signer on your PTA's bank account will need to complete this step. You'll also need your PTA's EIN and bank account information handy.

- Select the Admin Console button in the upper right.
- Click Store Admin, then Merchant Processing Agreement.
- See the [step-by-step guide](#) for completing the agreement. You'll most likely get instant approval.
- See this [fact sheet](#) on taking payments in MemberHub. You'll get FAQs on privacy, security, and how it works.



ONBOARDING PLAYBOOK, CONT'D

6. Add People to MemberHub.

There are several ways to add people to MemberHub, so you can get your entire school community in one place!

- Import a list of non-members. [Here's how.](#)
- [Add PTA members individually](#), or contact your state PTA office to import a list of members.
- Set up your [Site Joins page](#) to invite school families to sign up to receive communication through MemberHub.
- Invite families to purchase their PTA memberships in your school store (see Step 9 below)!

7. Build your hubs.

Hubs are secure distribution lists for your school communities -- PTA committees, grade levels, classrooms, clubs, teams and more. Here are three recommended hubs, but you can also get started by sending weekly PTA newsletters to your everyone hub. [Learn how to set up hubs.](#)

- The Everyone hub (automatically in your account - just add people) -- you're one click from email and text to all school families. [Learn how to start sending your PTA newsletter.](#)
- The PTA Board hub -- easily communicate with your fellow PTA leaders.
- The Transportation hub -- quickly get in touch with families of bus-riders.

8. Start communicating!

Start by sending weekly newsletters to keep your school families in the loop! [Here's how.](#)

You can also use hubs to share files and pictures, and create sign-ups for volunteers, items, and more - all in one place!

9. Start selling memberships and more in your school store.

Once you're set up to take payments online, you'll need to set up your store.

- In your Admin Console, go to the Store Admin tab. This will open the Admin screen of your MemberHub store in a separate tab.
- Click Memberships. Here, you'll see your standard state member types. They're already posted in your store, so all you have to do is click Edit to adjust pricing and other details. You can also [customize PTA membership types and pricing](#) for your school store.
- Then you can [add items](#) like spiritwear, donations, event tickets, and fundraisers to get the most out of your store and provide the ultimate flexibility to parents.
- Tell everyone in your school community! Get started with these [sample communications](#) to promote your store by email, newsletters, or social media!



*Did we
mention
you aren't
alone?*

MEMBERHUB IS HERE TO HELP

Every PTA volunteer we know is eager for help. That's why we have a team of dedicated customer engagement representatives – who are all PTA leaders themselves – to help you get the most out of MemberHub.

They'll help you set up your MemberHub site. Just [schedule a call!](#)

Here are some resources to help you customize your site and get families on board:

- [MemberHub support](#): Email and chat support, plus articles and videos to help you get started
- Setup [video series](#)
- [Help articles](#) on customizing your account
- [Support resource list](#) to find quick answers about MemberHub and PTA operations

THE MEMBERHUB MODEL: YOUR SUCCESS IS OUR SUCCESS

When it comes to the PTA, MemberHub doesn't operate like most traditional software companies, which rely on annual subscription fees and charge extra for customized software and support services.

The PTA Council representing the largest school system in North Carolina challenged us to do something different: Find a way to give PTAs the software for free. Why? Because MemberHub addresses many of their greatest needs, but many schools can't afford to pay for it.

The result: a partnership with PTAs across the country that ties our success to the success of PTAs like yours. And that helps us continue to innovate and make the product better for you.

Here is how our partnership works:

- We work with states to provide software made for the PTA.
- States, regions, and councils drive onboarding and training, with plenty of help from MemberHub.
- PTAs use MemberHub features that generate revenue for the PTA, like selling memberships and fundraising online. MemberHub makes a nominal fee on those transactions to put back into the business. Most MemberHub PTAs pass transaction fees onto buyers, so the PTA's effective fee is \$0.
- MemberHub uses that revenue to continue innovating and providing additional features that PTAs want.

That's how we keep our software free for the PTA.

*Running the PTA is
hard work.*

*Smart
software
makes it
easier.*

