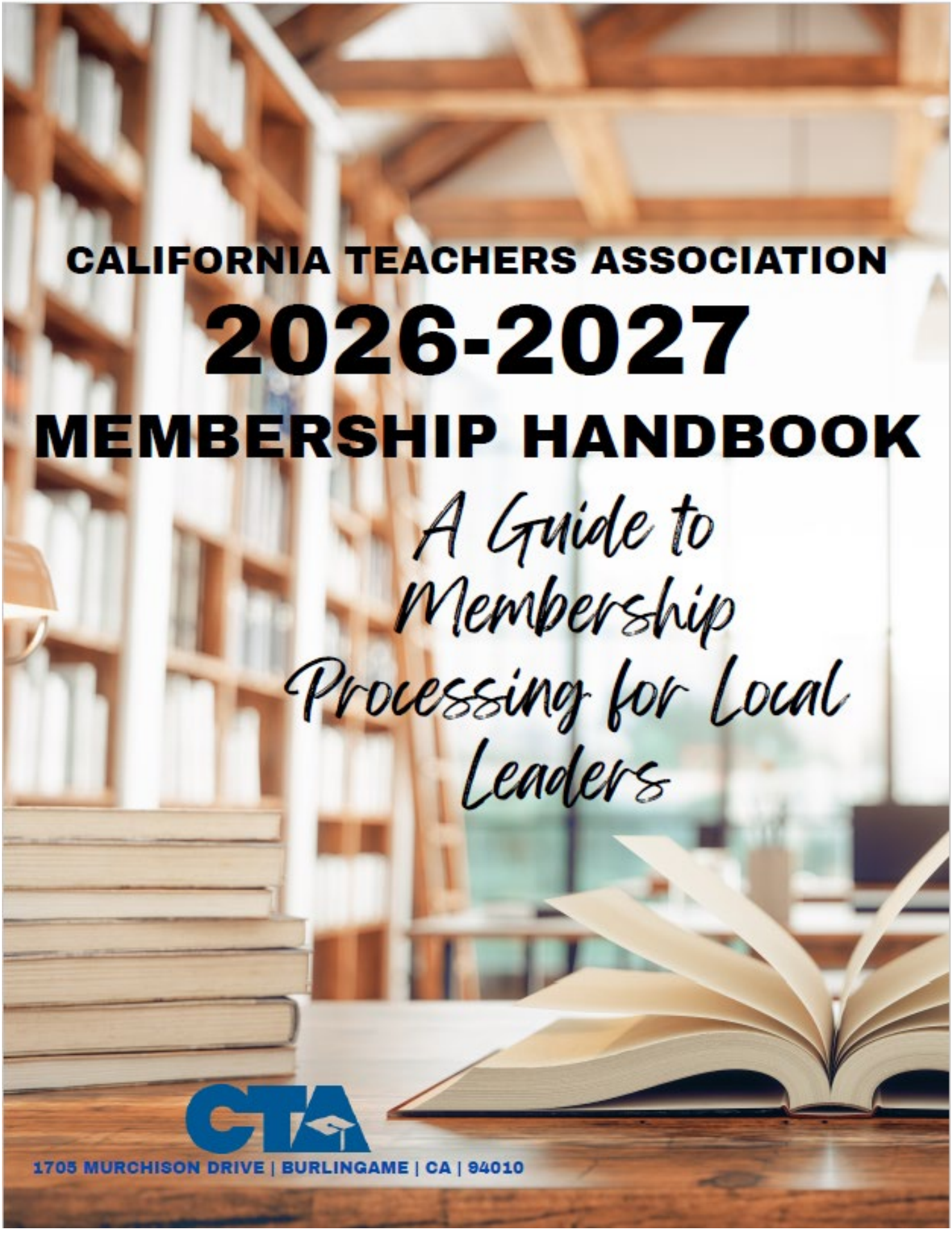

CALIFORNIA TEACHERS ASSOCIATION

# 2026-2027

# MEMBERSHIP HANDBOOK

## A Guide to Membership Processing for Local Leaders

1705 MURCHISON DRIVE | BURLINGAME | CA | 94010

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# INTRODUCTION

Welcome to your role as a Chapter Membership Contact! This is one of the most important leadership roles within your chapter, as maintaining accurate and up-to-date membership information is critical to building and sustaining a strong local association. Current membership records help support organizing efforts and ensure members receive timely communication regarding chapter activities, meetings, events, and opportunities for involvement.

As member demographic information changes and individuals transfer between work locations within the district, it is important to use CTA-provided membership applications and tools to keep records current. In addition, when your local conducts elections or appoints members to leadership positions, those assignments should be updated in the membership system to ensure leaders receive important communications and resources from CTA related to their roles.

Membership Contacts play a key role in enrolling members and communicating updates to the district, CTA, site representatives, and local officers so that all parties have access to accurate membership roster information.

This handbook is designed to provide the information and guidance you need to be successful in your role. We encourage you to review this document thoroughly, use these best practices to guide your work, and reference the handbook when explaining membership policies and procedures to local leaders and members.

To support your work, CTA has developed powerful local membership management tools. CTA 360 is a mobile app available for smartphones and tablets, and CTA 360Pro is a secure web-based platform that provides access to your local membership data. Membership Contacts and other local leaders can use these tools to view and update membership information in real time, including member contact information, work location changes, chapter leadership assignments, and new member enrollments.

To learn more about the full capabilities of CTA 360 and CTA 360Pro, visit:

- CTA 360
- CTA 360Pro

Be sure to also visit CTA Membership Resources, the dedicated website for Membership Contacts and local leaders. There you will find tools, resources, training materials, and contact information to support you in your role.

Each local chapter is also assigned a dedicated CTA Membership staff person to assist you. Membership staff can be found in CTA 360 or contact Membership Accounting at 650-552-5278 or Membership@CTA.org.

# DEPARTMENT CONTACT INFORMATION AND IMPORTANT LINKS

| SUBJECT: | CONTACT: |
|---|---|
| CTA Membership Accounting<br>- Membership Training<br>- CTA Membership Handbook<br>- Miscellaneous Local Membership<br>- Membership Materials<br>  - Enrollment Forms<br>  - Dues Schedules<br>  - Report Requests<br>  - Voluntary Deduction Forms<br>- Online Enrollment<br>- CTA 360 and CTA 360Pro | Order Materials<br>Membership@cta.org<br>(650) 552-5278 |
| ********** | ********** |
| CTA/NEA-Retired Membership<br>- Join CTA Retired Online<br>- Retired Benefits | CTA-Retired@cta.org<br>(650) 552-5439 |
| ********** | ********** |
| CTA-Aspiring Educators<br>- Join CTA-AE Online<br>- Student Member Benefits | CTA-AE@cta.org<br>(650) 552-5345 |
| ********** | ********** |
| CTA Member Benefits<br>- CTA Disaster Relief Fund<br>- The Standard Disability Insurance | Order Materials<br>MemberBenefits@cta.org<br>(650) 552-5200 |
| ********** | ********** |
| CTA Legal Services<br>- Group Legal Services (GLS)<br>- Educators Employment Liability Insurance (EEL) | Your Regional Uniserv Staff<br>CTA Legal Department<br>(650) 552-5425 |
| ********** | ********** |
| CTA Communications<br>- Promotional/Organizing Materials<br>- Member Engagement and Recruitment<br>- CA Educator Magazine | Order Materials<br>MembershipMaterials@cta.org<br>(650) 552-5365 |

# MEMBERSHIP TIMELINES

## ONGOING ACTIVITIES

New Membership Enrollment – Enroll new members through online enrollment at https://www.cta.org/join, CTA 360, or have them complete paper enrollment forms. Send in new paper enrollments weekly to CTA and submit the district copy of the enrollment form to your district payroll office as soon as possible. **Locals are responsible for notifying the district to begin deductions.**

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

Update member demographics (address, phone, email, work location, and leadership role) throughout the year using CTA 360 and/or CTA 360Pro.

## JUNE - AUGUST

**CTA 360 Access Renewal:** Email sent to chapter president requesting confirmation of continued user access to CTA 360 and CTA 360Pro for local leaders and representatives. Annual access expires August 31.

**Membership Materials**: Request sent by email to Membership Contact. Order Materials

**Membership Roster:** Update roster sent to local and/or district payroll. Contact district payroll office to ensure correct deduction amounts and determine payroll cutoffs for new year. Return membership roster with all changes noted to CTA Membership Accounting or make updates via CTA 360 or CTA 360Pro.

**Membership Dues Structure**: Distribute to Chapter Leaders and Site Representatives.

## OCTOBER

**Cash Membership Renewal**: Due by October 31. See pages 7 and 14 for more details.

**Membership Cards**: Direct mailed to members home address.

**NOVEMBER - JANUARY**

**1st Verification Roster**: Sent to local Membership Contact to verify member counts for NEA Representative Assembly delegate allocation.

**REPLY DUE: 1st Verification Roster:** Deadline to return roster to CTA or make updates via CTA 360/360Pro.

**MARCH - APRIL**

**2nd Verification Roster**: Sent to local Membership Contact to verify member counts.

**Reply Due: 2nd Verification Roster:** Deadline to return roster to CTA or make updates via CTA 360/360Pro.

**MAY - JUNE**

**Future Year Local Officers**: Local Association **President** receives Local Officer Update Request from CTA Membership via email to provide update of future year local officers. This information is critical to ensure that current and future leaders receive all communications.

**Reply Due: Future Local Officers Update**: Reply to CTA with updated Local Officers - name, role, and contact information for the coming year.

**Future Year Local Dues**: Local Association **President** and **Treasurer** receive Local Dues Update Request from CTA Membership via email to provide future year local dues.

**Reply Due: Future Year Local Dues Update**: Reply to Local Dues Update Request email regarding future year dues.

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

# DEFINITION OF MEMBERSHIP TYPE

## 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 education employment. The definition of administrative or supervisory status in higher education units shall be determined by the governing body of the local Association chapter.

**Active Full Time - Category 1**
For those faculty whose teaching assignment is more than 60% of a normal assignment, except for those certificated personnel whose salaries are less than the minimum teacher salary for the district in which they are employed, such as preschool, head start, childcare, adult education, and substitute teachers whose daily salaries are less than the regular 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 whose salary is less than the minimum salary paid regular teachers in the district where they are employed in the following categories: preschool, head start, childcare, adult education, and substitutes whose contract provides for a teaching assignment at one site for an entire school year shall qualify for payment of the dues prescribed by this category.

**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 they are actively employed and of the National Education Association.

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.

**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 and NEA Category 1 dues for the membership year for which they are eligible. Local Associate membership is available when the local chapter by-laws provide the same.

CTA Associate members shall be eligible for continuing participation in the economic services program of the Association, including payroll deductions where necessary, and shall receive the official publication of the Association.

Non-Bargaining Unit Members must make arrangements with their district/employer to deduct their CTA/NEA Associate dues via payroll deduction or payment in full is required.

**CTA/NEA RETIRED** - Any person who is or was a member of the Association and who is a qualified applicant for or recipient of service or disability retirement allowances from a public or private retirement system may become a member of CTA/NEA-Retired.

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.

| CTA/NEA-Retired | Annual | Lifetime | Monthly Deduction from CalSTRS or CalPERS pension |
|---|---|---|---|
| K12 & CCA | $85.00 | $600.00 | $5.70 |
| ESP | $51.00 | $360.00 | $3.40 |

Participation in such programs requires continuous membership.
Annual and Lifetime dues may be paid by personal check, monthly through member's STRS or PERS benefit check, or online at https://www.cta.org/for-educators/meet-cta/ctanea-retired. Questions regarding retired membership should be referred to CTA-Retired@cta.org or 650-552-5439.

**CTA/NEA PRE-RETIRED SUBSCRIBER** - Members of CTA are eligible to become Pre-Retired Subscribers any time prior to actual retirement. By paying Retired Life membership dues, members become eligible to receive the benefits and services of CTA/NEA-Retired immediately upon retirement.

CTA/NEA Pre-Retired Lifetime membership dues: $600.00 for K12 & CCA member
$360.00 for ESP member

**CTA/NEA RETIRED PARTNER MEMBER** - Any person who is a member of the NEA-Retired and a member of his/her NEA/Pension State Retired Affiliate, but was not a member of CTA, and is a qualified recipient of service or disability retirement allowances from a public or private retirement system.

CTA/NEA Retired Partner Member $200.00

**CTA ASPIRING EDUCATORS** – CTA-AE $15.00 (includes $5 Local dues); NEA $15.00 - Any person regularly enrolled in an institution of higher education preparing to become a teacher and eligible to become a member of the CTA Aspiring Educators 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 their first year of eligibility can request a rebate of Aspiring Educator dues paid; $10 per year up to five years for CTA and $20 per year, up to four years for NEA. For questions about CTA Aspiring Educators rebates, contact cta-ae@cta.org.

Students may enroll in one or two ways:

1. Online with a major credit/debit card at https://www.cta.org/for-educators/meet-cta/ctaae.
2. Complete a CTA Aspiring Educators enrollment form and send with check or money order for full annual dues to the CTA-AE office, P.O. Box 921, Burlingame, CA, 94011-0921.

**CTA EDUCATION SUPPORT PROFESSIONALS (ESP)** - 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 eligible classified employees in each school district.

**MISCELLANEOUS LOCAL MEMBERSHIP** – The Miscellaneous Local allows individuals to maintain CTA/NEA membership while employed in public education but not represented by a bargaining contract. There are several eligibility requirements that need to be met for an individual to qualify under the Miscellaneous Local.

Common examples of Miscellaneous Local members may include:

- Unpaid Leave of Absence
- Ongoing Group Legal Services
- Substitutes (No Local Representation)
- Public Charter School Teacher (Not Represented by CTA)

Additionally, the category of Associate Membership is available under Miscellaneous Local for 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.

Miscellaneous Local membership inquiries regarding Group Legal Services should be directed to the CTA Primary Contact Staff.

For any other Miscellaneous Local membership inquiry, please contact CTA Membership at 650-552-5278 or membership@cta.org.

## PRO-RATED MEMBERSHIP DUES

After the beginning of any membership year, the dues of Active members who are enrolling for the first time may be prorated, provided enrolling by payroll deduction if such deductions are available or by any one of the other payment methods approved by the Board of Directors. Cash payment may also be accepted for the balance of such membership year for any member who previously enrolled through a payroll deduction.

## 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 an unpaid leave of absence about the invaluable benefits they may be jeopardizing by not maintaining CTA membership.

Maintaining membership during an unpaid 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 Member-Only benefits
- Members who take advantage of CTA's insurance programs can continue their coverage at CTA exclusive rates and without coverage interruption.

CTA recommends that active members maintain their membership while on an unpaid leave of absence. Members can maintain their membership and benefits while on LOA at a significant discount, **Category 3A** dues rate. Members need to make arrangements with their local to pay these dues before their pay ceases.

Members on an LOA can be tracked and managed through CTA 360. Use the checkbox to identify members in these scenarios.

Members opting not to continue active membership while on unpaid leave will be transitioned in the CTA membership database (CTA 360/Falcon) to **Inactive Member** status and are ineligible for member benefits. As the individual is still part of the bargaining unit, they will remain on chapter rosters so leaders can track them and invite them to retain their membership once they return. CCA members converted to this category will receive an email notification with an option to remit dues to CTA to continue Active membership.

# ACTIVE MEMBER vs INACTIVE MEMBER vs NON-MEMBER

An **Active Member** is any current bargaining unit member who has signed a CTA Membership Enrollment Form and is current on dues payments. Union benefits and representation are available to all Active members.

**Inactive Members** are not current on dues payments. They must resume dues deductions or make payment in full to continue as Active.

**Non-Members** are all other bargaining unit members. Non-Members are identified in the CTA membership system using the following categories:

1. POTENTIAL – Bargaining unit members who are eligible to become an Active Member but have not joined.
2. DROPPED – Formerly Active members who voluntarily and officially dropped membership.
3. FORMER FEE PAYER (PRIOR JANUS) – Potential members who have declined membership historically and do not want to be contacted.

**Dues Payers** (CTA Dues Category) are Non-Members who dropped membership outside the Maintenance of Dues commitment window and continue to owe dues until eligible to revoke the payroll authorization.

## CONTINUITY OF MEMBERSHIP

To support local organizing efforts and to reduce local administrative burden, CTA's practice is to allow for the reinstatement of formerly Active members that ended their membership less than one year prior in the same local, regardless of the original signature date. See examples below.

This also applies to temporary employees represented by the bargaining unit. They do not need to re-enroll if a new contract is signed within one year of the last Active membership.

Examples:

- John Smith was an Active member with Staff Teachers Association from 9/1/2018 to 11/30/2020. He took an unpaid LOA from 12/1/2020 to 2/28/21 in the same local. He can be reinstated as an Active member as of 3/1/2021 without requiring a new enrollment form. The local needs to tell the district to add John Smith to the payroll deduction register as a CTA member.

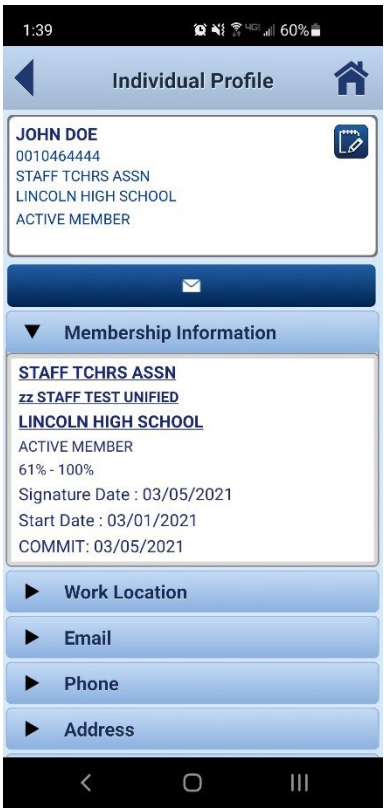
- Jane Doe was an Active member with Staff Teachers Association from 2/1/2016 to 2/28/2020. She took an unpaid LOA from 3/1/2020 to 4/30/2021 and did not maintain her membership. She returns to the classroom as of 5/1/2021. She must complete a new enrollment form to re-join as an Active member and resume payroll deductions for dues because she was gone longer than 12 months.

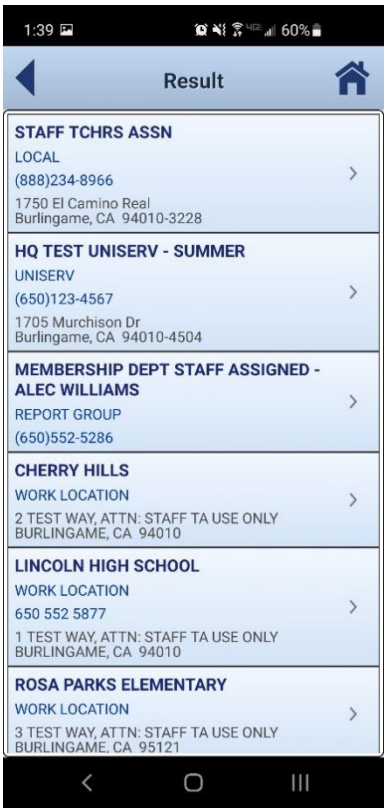
# CTA 360 AND CTA 360PRO FOR LEADERS

CTA 360 and CTA 360Pro are free-to-use tools available for local leaders. The tools are integrated – an addition or update of member information in one tool is reflected in the other in real time and can greatly assist local leaders in member engagement and organizing activities. These tools provide an easy way to verify and update member and non-member information by allowing a leader to update the information through the mobile application or via a web browser.

**How To Access** - CTA 360 and CTA 360Pro access must be authorized by the chapter president. Access is always given on an annual basis and automatically terminates August 31st of each year or when the leadership position ends. Access must be renewed annually with permission from the chapter president. Each summer, chapter presidents are sent and tasked with reviewing the list of local leaders whose access should be extended for an additional year.

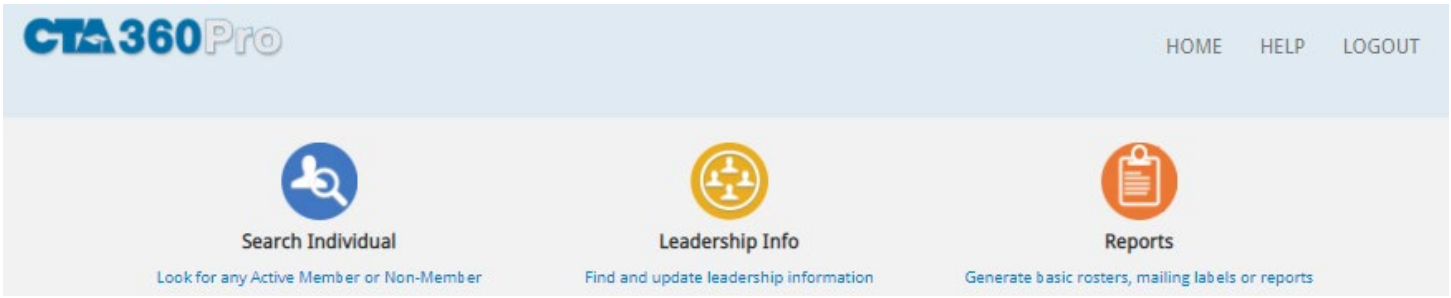
**CTA 360** – CTA 360 is a mobile app available for local leaders on mobile devices and tablets. CTA 360 provides the ability to search, view and update member and non-member data within the local, enroll new members, and convert non-members to active members. Local leaders can also view local organization information and access graphical reports to view the member and non-member counts. To learn more about the full capabilities of CTA 360 and how to request access, visit: www.CTA.org/Membership/CTA360.

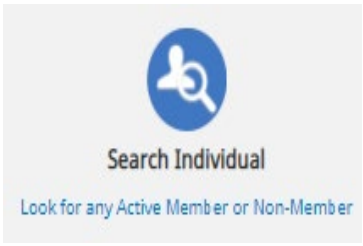


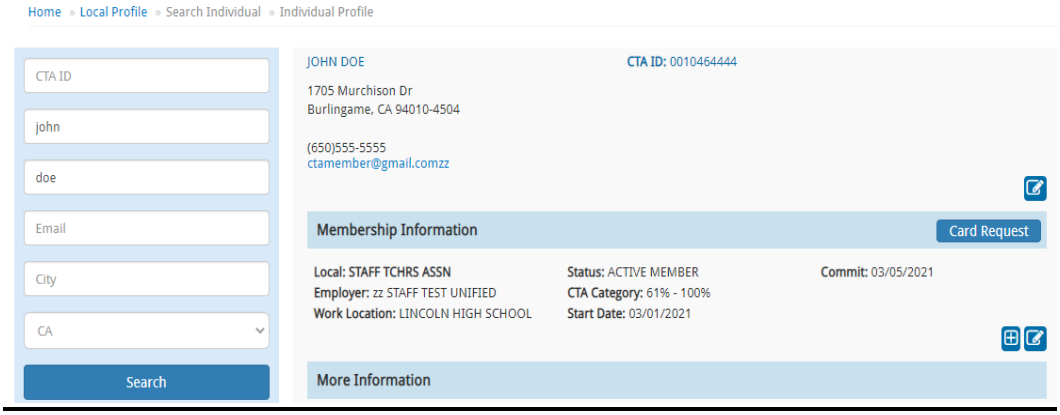






**CTA 360Pro** – CTA 360Pro is a secure, dedicated website accessible from any internet browser on a desktop/laptop. CTA 360Pro users will be able to search, view and update member and non-member data within the local, view and update local leadership information, and request membership cards. CTA 360Pro provides additional reporting functionality with more detailed reports such as full member roster, building lists, mailing labels, leadership rosters, voter rosters, and more. To learn more about the full capabilities of CTA 360Pro and how to request access, visit: https://www.cta.org/membership/cta360-pro.

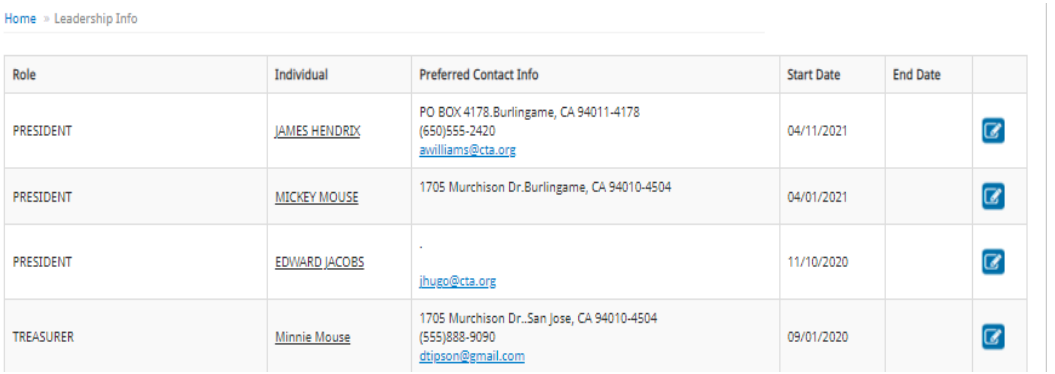


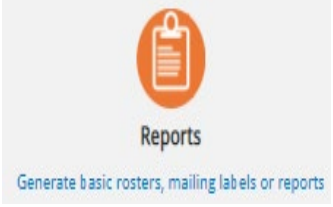



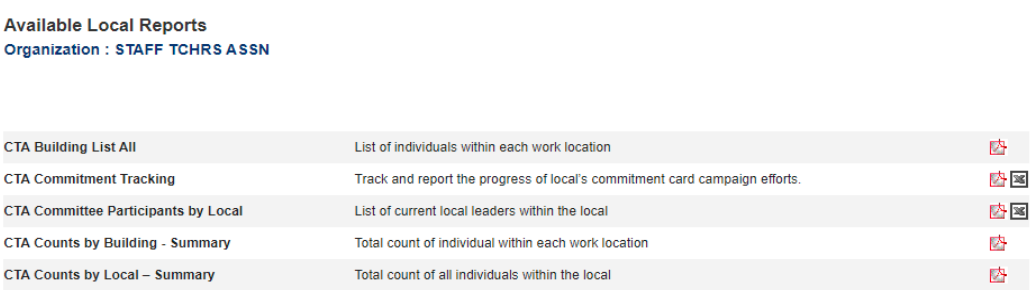









# LEGISLATIVE UPDATES

## 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 dues only be collected from members after the SCOTUS decision. Districts and locals must work collaboratively to ensure payroll deductions only be collected from Active members.

## LEGISLATION TO HELP MEMBERSHIP RECRUITMENT AND ORGANIZING

**SB 866** –This legislation impacts how employers communicate and interact with employees regarding union membership and dues. SB 866 allows the local chapter to represent to the district who are members of the union by providing a written report or roster of members. A signed membership form may still be provided but is not required.

SB 866 also prevents the school district from discouraging employees from joining the union, discussing the cost of union membership, and stopping union membership dues deductions without being instructed by the union.

**AB 119** – This legislation impacts how employers communicate and interact with the local chapter regarding union members. AB 119 requires the district to allow the local chapter access to new employee orientations. Districts must generally give 10 days' notice prior to the orientations, and upon request, must negotiate regarding the structure, time, and manner of access given to the local chapter.

The district must also provide the local chapter with employee personal contact information for employees within the bargaining unit. The district is required to provide contact information for new employees within 30 days of hire and is required to provide contact information for all members of the bargaining unit every 120 days.

Please work with your CTA Primary Contact Staff to develop a plan to implement these laws to better organize and engage your members.

# ENROLLMENT FORMS AND INSTRUCTIONS

## CTA Online Enrollment

CTA offers online enrollment for locals to use as part of organizing and member recruitment planning.

Online enrollment is for potential members and current members who are transferring from one local to another or joining multiple chapters. Enrollees will need to search for their CTA record, verify eligibility by confirming a few basic eligibility questions, complete the entire form, electronically sign and submit to complete the enrollment process – it takes approximately 5 minutes. You can share the link during virtual orientations or email it to potential members.

New members will receive a confirmation 'Welcome Email' with member benefits information, a temporary membership card, and chapter leadership information the day following enrollment.

The Chapter President, Membership Contact, CTA PCS, select district contacts, and CTA Membership Staff person will receive a weekly email report of new online and CTA 360 enrollees. **Chapter policies must ensure this notice is provided to the district with instructions to begin payroll deductions.**

The link to join CTA is https://join.cta.org/




Visit: https://www.cta.org/document/open-enrollment-need-to-know for an overview of the Online Enrollment process.

Watch a demo from the Member perspective: https://youtu.be/eS4aBEbd-KM?si=NxBBjIw_X_3vjCM6

FAQs

**• Q: Do I still need to complete a paper enrollment after filling out the online form?**

No, there is no need to complete a separate paper enrollment form. The membership is automatically saved once the member accepts CTA's terms & conditions, enters their electronic signature, and clicks 'Enroll'.

**• Q: Paper enrollments have a member copy they can keep for their records when they enroll. How can members get a copy of their online enrollment?**

After enrolling online, new members will receive an email confirmation of their enrollment within 24 hours. This confirmation will provide each member with a link to their completed enrollment form, that they can view or print for their records.

**• Q: Should we now direct everyone to the online enrollment form?**

Online enrollment is an easy way for members to enroll with CTA. The paper form and the ability to sign up with face-to-face contact on the CTA 360 mobile app is still available.

**• Q: How does the district know to initiate payroll deductions once a new member completes their online enrollment?**

On a weekly basis, the CTA Membership Department will provide to the Chapter President, Membership Contact and CTA staff person via email, a list of new members who completed the online enrollment form the previous week. Forward this information to the district payroll office in a timely manner, so monthly payroll deductions can begin.

**• Q: I provided a list of new members who enrolled online to my district payroll office, but they are asking for a copy of a signed paper enrollment form before they initiate deductions. What do I do?**

Per Senate Bill (SB) 866, the employer must accept the information provided by the union on dues deductions for employees. However, if you wish to accommodate the district's request, A copy of the form can be downloaded from the member profile by clicking on the CTA Enrollment icon.

**• Q: We have been entering non-members for our local into Falcon. Can they enroll online or is this just for brand new members that we have not entered at all?**

Non-members as well as brand new individuals can utilize the online enrollment form. If an individual is not found in Falcon, a brand-new profile and new membership will be added. If an individual is found (ie: a current non-member that has been entered into Falcon), they will be able to update their contact information and enroll as a member.

# INSTRUCTIONS FOR COMPLETING PAPER 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 the 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 the 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 forms. 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 notification of new memberships as soon as possible.

3. Third copy to local association for its files.

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

The best practice for chapter enrollment form records retention is to maintain a copy of the enrollment form while the member is employed by the district or a change in their status with the Association.

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

Do not use prior versions of enrollment forms. Use only the forms on the following pages as the Terms & Conditions may be updated. Please discard/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**

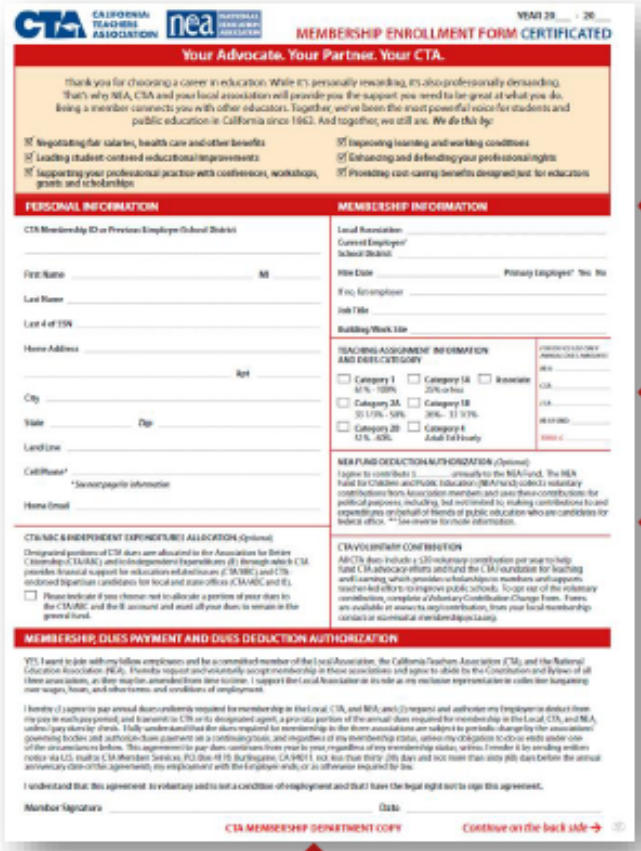
**Be sure to only use this form, do not use any other enrollment form.**

## 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 Previous Employer/School District 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.




## Membership Information:

- Include the full name of the local, employer and hire date.
- Include the name of the primary employer.
- Include the full school name.

## Teaching Assignment:

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

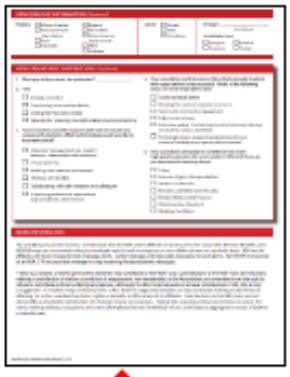
## NEA Fund Deduction:

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.**

**COMPLETE THE BACK OF THE ENROLLMENT FORM**



## Demographics:

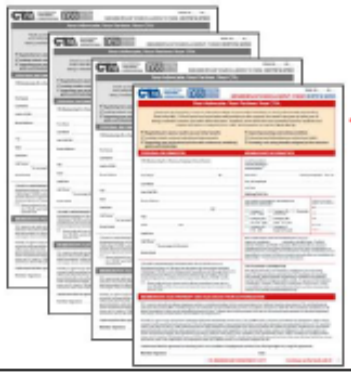
Optional information to help CTA better serve members.

## 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

CALIFORNIA TEACHERS ASSOCIATION

NATIONAL EDUCATION ASSOCIATION

YEAR 20___ - 20___

# 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 or Previous Employer/School District**

_____

**First Name** _____ **MI** _____

**Last Name** _____

**Last 4 of SSN** _____

**Home Address** _____

_____ **Apt** _____

**City** _____

**State** _____ **Zip** _____

**Land Line** _____

**Cell Phone*** _____

** See next page for information*

**Home Email** _____

### CTA/ABC & INDEPENDENT EXPENDITURES ALLOCATION *(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). All members who are U.S. citizens or lawful permanent residents are eligible to contribute to CTA/ABC and IE.

☐ Please indicate if you choose not to allocate a portion of your CTA dues to the CTA/ABC and the IE account and/or if you are ineligible to do so due to immigration status, and you instead want all those dues to remain in CTA's general fund.

## MEMBERSHIP INFORMATION

**Local Association** _____

**Current Employer/ School District** _____

**Hire Date** _____ **Primary Employer? Yes No**

If no, list employer _____

**Job Title** _____

**Building/Work Site** _____

### TEACHING ASSIGNMENT INFORMATION AND DUES CATEGORY

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

*FOR OFFICE USE ONLY*
*ANNUAL DUES AMOUNTS*

*NEA:* _____
*CTA:* _____
*LEA:* _____
*NEA FUND:* _____
*TOTAL: $* _____

### 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.

### CTA VOLUNTARY CONTRIBUTION

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.

## 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 four 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 in consideration for the services they provide; 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 four 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 personally sending a signed 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.

**I understand that this agreement is voluntary and is not a condition of employment and that I have the legal right not to sign this agreement.**

**Member Signature** _____ **Date** _____

CTA MEMBERSHIP DEPARTMENT COPY

*Continue on the back side →*

## DEMOGRAPHIC INFORMATION *(Optional)*

**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

## MORE INFORMATION

*By providing my phone number, I understand that the NEA and its affiliates including CTA, CCA, 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, CCA, 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.

CALIFORNIA TEACHERS ASSOCIATION | NATIONAL EDUCATION ASSOCIATION

YEAR 20___ - 20___

# 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 or Previous Employer/School District

_____

First Name _____ MI _____

Last Name _____

Last 4 of SSN _____

Home Address _____

_____ Apt _____

City _____

State _____ Zip _____

Land Line _____

Cell Phone* _____

** See next page for information*

Home Email _____

### CTA/ABC & INDEPENDENT EXPENDITURES ALLOCATION *(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). All members who are U.S. citizens or lawful permanent residents are eligible to contribute to CTA/ABC and IE.

☐ Please indicate if you choose not to allocate a portion of your CTA dues to the CTA/ABC and the IE account and/or if you are ineligible to do so due to immigration status, and you instead want all those dues to remain in CTA's general fund.

## MEMBERSHIP INFORMATION

Local Association _____

Current Employer/ School District _____

Hire Date _____ Primary Employer? Yes No

If no, list employer _____

Job Title _____

Building/Work Site _____

### ANNUAL SALARY CATEGORY (see CTA ESP DUES SCHEDULE)

☐ ESP Category 1 ☐ ESP Category 2

☐ ESP Category 3 ☐ ESP Category 4

☐ ESP Category 5

*FOR OFFICE USE ONLY*
*ANNUAL DUES AMOUNTS*

*NEA:* _____

*CTA:* _____

*LEA:* _____

*NEA FUND:* _____

*TOTAL: $* _____

### 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.

### CTA VOLUNTARY CONTRIBUTION

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.

## 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 four 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 in consideration for the services they provide; 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 four 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 personally sending a signed 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.

**I understand that this agreement is voluntary and is not a condition of employment and that I have the legal right not to sign this agreement.**

**Member Signature** _____ **Date** _____

CTA MEMBERSHIP DEPARTMENT COPY

*Continue on the back side →*

CALIFORNIA TEACHERS ASSOCIATION | NEA NATIONAL EDUCATION ASSOCIATION | CCA

YEAR 20___ - 20___

# 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, CCA 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 or Previous Employer/School District

_____

First Name _____ MI _____

Last Name _____

Last 4 of SSN _____

Home Address _____

_____ Apt _____

City _____

State _____ Zip _____

Land Line _____

Cell Phone* _____

** See next page for information*

Home Email _____

### CTA/ABC & INDEPENDENT EXPENDITURES ALLOCATION *(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). All members who are U.S. citizens or lawful permanent residents are eligible to contribute to CTA/ABC and IE.

☐ Please indicate if you choose not to allocate a portion of your CTA dues to the CTA/ABC and the IE account and/or if you are ineligible to do so due to immigration status, and you instead want all those dues to remain in CTA's general fund.

## MEMBERSHIP INFORMATION

Local Association _____

Current Employer/
School District _____

Hire Date _____ Primary Employer? Yes No

If no, list employer _____

Job Title _____

Building/Work Site _____

### FACULTY ASSIGNMENT INFORMATION

☐ **Category 1**
Full-Time

☐ **Category 4**
Part-Time or Hourly

*FOR OFFICE USE ONLY*
*ANNUAL DUES AMOUNTS*

*NEA:* _____

*CTA/CCA:* _____

*LEA:* _____

*NEA FUND:* _____

*TOTAL: $* _____

### 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.

### CTA VOLUNTARY CONTRIBUTION

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.

## 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), the Community College Association (CCA), 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 four 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, CCA, and NEA in consideration for the services they provide; 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, CCA, and NEA, unless I pay dues by check. I fully understand that the dues required for membership in the four 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 personally sending a signed 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.

**I understand that this agreement is voluntary and is not a condition of employment and that I have the legal right not to sign this agreement.**

Member Signature _____ Date _____

CTA MEMBERSHIP DEPARTMENT COPY

*Continue on the back side →*

# MEMBERSHIP TRANSMITTAL FORM

The transmittal form should accompany all transactions involving new payroll members and cash renewals. (See sample on page 21) 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: _____ BY: _____ DATE: _____
(Local Name) (Name and Title of person completing the form)

EMAIL: _____ PHONE: (_____) _____

For Membership Dept use only: ☐ Certificated ☐ ESP ☐ CCA

File Name: _____ Date Received: _____ Staff: _____
(Start Month- Local ID/-Signature Month)

| NAME (List Alphabetically) | CTA Category (1, 2A, 2B, 3A,3B, 4) | Month Deduction Begins | Monthly P/R Deduction Amount | Check Amount |
|---|---|---|---|---|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |
| 4 | | | | |
| 5 | | | | |
| 6 | | | | |
| 7 | | | | |
| 8 | | | | |
| 9 | | | | |
| 10 | | | | |
| 11 | | | | |
| 12 | | | | |
| 13 | | | | |
| 14 | | | | |
| 15 | | | | |
| 16 | | | | |
| 17 | | | | |
| 18 | | | | |
| 19 | | | | |
| 20 | | | | |
| 21 | | | | |
| 22 | | | | |
| 23 | | | | |
| 24 | | | | |
| 25 | | | | |
| | | | TOTAL CHECK AMOUNT | |
| **COMPLETE THIS SECTION ONLY REMITTING CASH MEMBERSHIP DUES** | | | 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.

5/22 CTA Membership Accounting Department, P.O. Box 4178, Burlingame, California 94011-4178

# PAYROLL DUES & PAYROLL FILES REMITTANCE OPTIONS

There are several convenient ways to remit your dues payments:

1) **CTA ePay Portal** – Most secure and efficient (Please see flyer on next page)
   - We highly recommend using the CTA ePay electronic payment portal.
   - Please refer to the flyer for detailed instructions.

2) **Checks (No transmittal slip)** - Traditional Method & Less secure and efficient
   - Transmittal slips are not required when:
     - The CTA 4-digit Local ID is included on the check.
   - ➢ Mail payments to:

> **California Teachers Association**
> *CTA 4-digit Local ID**
> **P.O. Box 45529**
> **San Francisco, CA 94145-0529**

*Email us at membership@cta.org if you need your Local ID.

3) **Checks with transmittal slip** – Traditional Method & Less secure and efficient
   - You may continue to submit payments with a transmittal slip if preferred.

---

## Payroll Remittance (Files and Supporting Documents)

CTA now requests all payroll files and supporting documents be uploaded to our secure site. This ensures safe and efficient electronic transfer of employee/ member data from the District to CTA.

**Please Note:**

- Uploaded documents do not need to accompany the physical check.
- Microsoft Excel is the preferred file format for data uploads.

To enroll for this process, please visit www.CTA.org/PayrollRequest or scan the QR code.

CALIFORNIA TEACHERS ASSOCIATION

OUR UNION.
OUR PROFESSION.
**OUR STUDENTS.**

# YOU'RE INVITED TO PARTICIPATE IN CTA ePay

## ACH DUES PAYMENT PROGRAM




The California Teachers Association is pleased to invite your chapter or district to participate in **CTA ePay**, a payment program utilizing **ACH (Automated Clearing House)** for the electronic submission of membership dues.

This program provides an opportunity to streamline your payment process, improve efficiency, and enhance security by transitioning from paper checks to electronic payments.

### STREAMLINED PROCESS

*Eliminate paper checks and reduce time spent on manual processes.*

### IMPROVED EFFICIENCY

*Simplify your workflow and ensure timely dues payments.*

### ENHANCED SECURITY

*ACH payments offer a secure, reliable, and auditable payment method.*

### SUPPORT YOU CAN COUNT ON

Participating chapters and districts will receive clear setup instructions and direct support from CTA staff to help make the transition to CTA ePay smooth and successful.

### NEXT STEPS

If your chapter or district is interested, please send the name, position, and email of the person responsible for processing electronic payments to CTA. **We will provide the next steps to create your CTA ePay account.**

CTA ePay

**LEARN MORE**
*WE ARE HERE TO HELP.*

cta.org/membership | 650.552.5278 | membership@cta.org

# NAME AND ADDRESS CHANGES

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.

Chapter leaders and representatives can update member contact information directly in the CTA 360 and CTA 360Pro Association tools.

The Membership Chairperson can also appraise CTA of changes through notations made on the rosters sent in November and March.

# MATERIALS REQUESTS

Printed forms and supplies can be ordered through the CTA Membership Accounting Department. Complete the Membership Materials Request Form on CTA.org/membership or scan the QR code:

# 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 7). If demographic updates are made via CTA 360 or CTA 360Pro, physical rosters do not need to be returned. Any updates made on the physical roster should be made as follows (see sample on the next page).

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) **Removing a member**: Write **"DELETE"** along with the reason and effective date in the center of the roster, and **do not cross through the member's name**.

   d) **Adding a Member:** Submit a completed and signed enrollment form to CTA, or have the member enroll online at Join.CTA.org.
   **If the member does not appear on the roster:** If an enrollment form was previously submitted, send the local's retained copy or contact your CTA Membership staff person for assistance.

   e) **Voluntary Contributions:** When 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 the authorization form was previously submitted but the contribution does not appear on the member's roster record, send the local's retained copy.

   f) **Local Dues Changes:** If your local dues amount has changed from the amount shown in the roster cover letter, include a memo with the returned roster. You do not need to correct each individual dues amount on the roster
   **Important:** Notify both your district payroll department and CTA Membership Accounting of any local dues change.

2. **Cash Renewals:** When returning a roster to CTA that includes individuals paying by cash, include a check payable to CTA for all cash renewals. Submit payment by the end of October to ensure renewing members continue receiving CTA/NEA services.

   **Cash-to-Payroll Changes:** Renewal payments and enrollment forms for members switching from cash to payroll deduction may be sent without the roster by using the membership transmittal form (see page 25).

## CTA MEMBERSHIP ROSTER 20XX—20XX



**SAMPLE TCHRS ASSN—1234**
**SAMPLE UNIFIED**

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

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. Primary Telephone number.
6. Member' s primary email.
7. Category.
8. Dues amounts.
9. Total dues and Monthly payroll deduction amount.

# MEMBERSHIP CARDS

Membership cards are imprinted with the member's name, CTA ID, and local affiliate name.

For continuing and new members processed prior to September 1st, CTA will mail cards directly to the members primary address in October. Cards for new members enrolling throughout the year are mailed approximately every other week.



**Your Union Membership Card!**

In your union, you are never alone. We are stronger together.

0010000000
MEMBER NAME
1705 MURCHISON DR
BURLINGAME, CA 94010

CTA CALIFORNIA TEACHERS ASSOCIATION
nea NATIONAL EDUCATION ASSOCIATION

2026-2027 CTA MEMBERSHIP CARD
ID# 0010000000
MEMBER NAME
STAFF TCHRS ASSN

ACCESS BENEFITS, RESOURCES AND MORE AT
CTA.ORG • CTAMEMBERBENEFITS.ORG • NEAMB.COM

CTA CALIFORNIA TEACHERS ASSOCIATION
nea NATIONAL EDUCATION ASSOCIATION

Dear Educator,

Your union card is more than a piece of paper, it's proof of your membership in the largest union in the country – the California Teachers Association (CTA) and the National Education Association (NEA). We are truly stronger together.

In our union of 310,000 members across California, you are part of a strong legacy of educators and other school workers supporting students and improving public education since our founding in 1863.

Careers in education carry great responsibility. In our schools, we are at the center of our communities. In our careers, we inspire and empower students and their families. Together in our union, we fight for stronger resources for our schools and communities.

Learn more about your union and find more resources at cta.org and on the back of this letter.

We look forward to working with you in the months and years to come.

Sincerely,

David B. Goldberg, CTA President

Becky Pringle, NEA President

**CTA's Mission is Clear**

The California Teachers Association exists to protect and promote the well-being of its members; to improve the conditions of teaching and learning; to advance the cause of free, universal, and quality public education for all students; to ensure that the human dignity and civil rights of all children, youth and adults are protected; and to secure a more just, equitable, and democratic society.

# DIGITAL MEMBERSHIP CARD

The digital membership card works the same way as the physical card members receive. They can continue to use either card to get access to a variety of benefits and programs to enhance their life and career.

CTA sends an email to all Active Members at the beginning of each membership year. Once members receive CTA's email, they can simply follow the prompts to download or save the CTA digital membership card to their Apple Wallet, Google Pay, or as a photo on any mobile device.



If a member cannot find the email or has a need for a new card, here's how you can request a new CTA digital membership card for your members:

- **CTA 360 users** - navigate to the member's individual profile and click the "Membership Card" header and tap 'New Request'. Complete the form and an email can automatically be sent to the individual's primary email address with instructions to download their digital card.

- **CTA 360Pro users** - navigate to the member's individual profile and click "Card Request". When the card request window appears, click the "Send Digital Membership Card" button at the top. An email will automatically be sent to the individual's primary email address with instructions to download their digital card.

# 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.

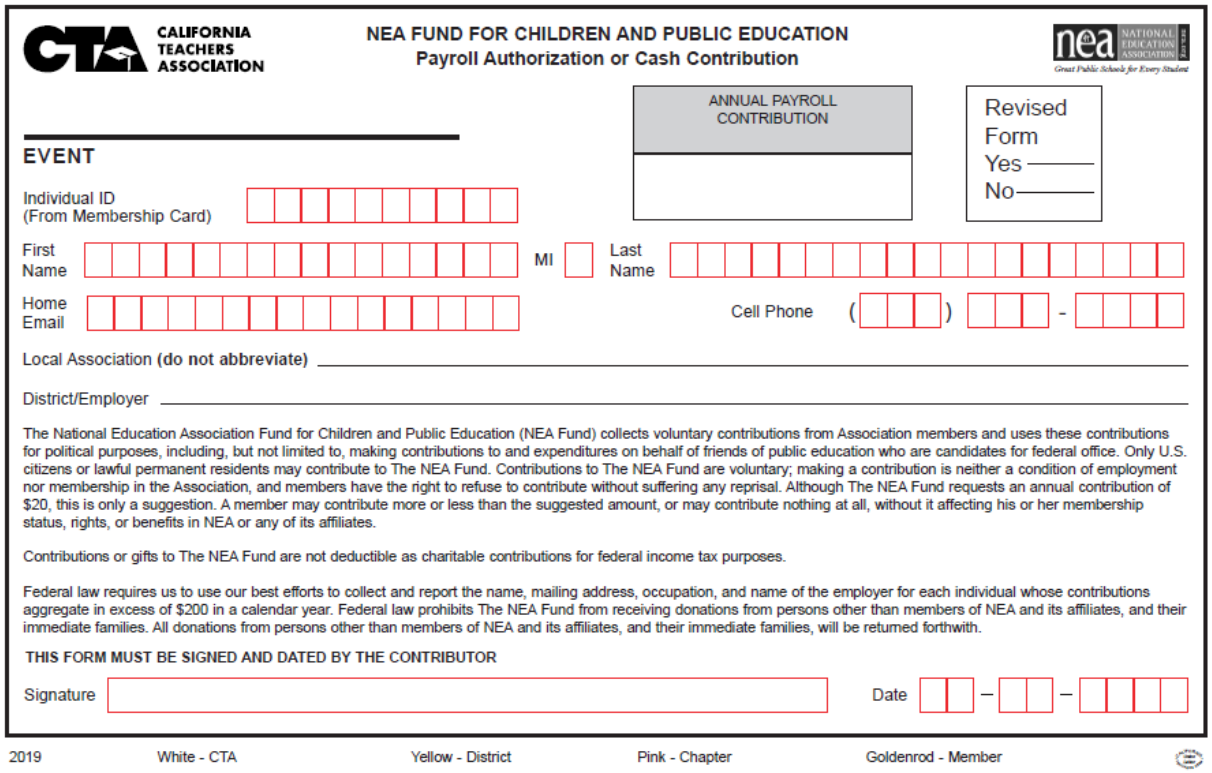
B. Individual NEA Fund contributions of $50.00 or less must be received by the CTA Membership Accounting Department, within 15 days of receipt by the Local, Service Center Council, or any person collecting NEA Fund contributions.

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.

**FEC Compliance Reminder:** NEA Fund contributions must be transmitted within the required timelines. Contributions submitted late become “soft money,” meaning they may be used only for administrative purposes, such as postage or stationery, and not for political contributions.



CALIFORNIA TEACHERS ASSOCIATION

**NEA FUND FOR CHILDREN AND PUBLIC EDUCATION**
**Payroll Authorization or Cash Contribution**

NATIONAL EDUCATION ASSOCIATION
*Great Public Schools for Every Student*

ANNUAL PAYROLL CONTRIBUTION

Revised Form
Yes ——
No ——

**EVENT**

Individual ID (From Membership Card)

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 $20, 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 – –

2019 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 $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 a member 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 magazine as well as online at cta.org/voluntary-contribution. Members can download the Voluntary Contribution Change Form through the CTA website.

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

# REPORT 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.

**Submitting Complex Report Requests:** Use the Report Request process for more complex data needs. The Report Request form is an interactive PDF that can be completed online and emailed to ReportRequest@CTA.org.

To request the PDF or ask questions, contact ReportRequest@CTA.org. Before completing the form, 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 5 – 7 business days 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 members' 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)

LOCAL: ☐ _____
DEPARTMENT: ☐ _____
OTHER: ☐ _____
REQUEST DATE: / /

**REQUESTER INFORMATION**

NAME: _____
PHONE: _____
EMAIL: _____
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)

| | Last Name | First Name | Local/Group Name | Local/Group then First Name | Local/Group then Last Name |
|---|---|---|---|---|---|
| ☐ ALPHABETIC: | | | | | |
| ☐ 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:
Name: _____
Email: _____
Name: _____
Email: _____

Notify of MyFalcon Availability: _____ _____ _____ _____

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 _____ CTA ID# _____

Address _____

City _____ State _____ Zip _____

Chapter Name _____ School District _____

**CTA/ABC & INDEPENDENT EXPENDITURES ALLOCATION**
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). All members who are U.S. citizens or lawful permanent residents are eligible to contribute to CTA/ABC and IE.

I choose not to allocate a portion of my CTA dues to the CTA/ABC and the IE account and/or are ineligible to do so due to immigration status and instead want all those dues to remain in CTA's general fund.

Signature _____ Date _____

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 sent to the address below for processing:

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

**** Members who previously submitted an Opt-Out request and wish to revoke their allocation must submit a written request to Opt-In to the address above or via email to membership@cta.org ****

# MEMBERSHIP DUES STRUCTURE 2026-27

| | | |
|---|---|---|
| **CATEGORY 1**<br>For those faculty whose teaching assignment is more than 60% of a normal assignment, except for those certificated personnel whose salaries are less than the minimum teacher salary for the district in which they are employed, such as pre-school, head start, childcare, adult education, and substitute teachers whose daily salaries are less than the regular minimum teacher salary for the district in which they are employed. | **CTA Dues**<br>**NEA Dues** | **$ 899.00**<br>**$ 234.00** |
| **CATEGORY 2A**<br>For those faculty whose teaching assignment is greater than 1/3 but not more than 50% of a normal assignment. | **CTA Dues**<br>**NEA Dues** | **$ 459.50**<br>**$ 133.50** |
| **CATEGORY 2B**<br>For those faculty whose teaching assignment is greater than 50% but not more than 60% of a normal assignment, or faculty whose salary is less than the minimum salary paid regular teachers in the district where they are employed in the following categories: preschool, head start, childcare, adult education, and substitutes whose contract provides for a teaching assignment at one site for an entire school year shall qualify for payment of the dues prescribed by this category. | **CTA Dues**<br>**NEA Dues** | **$ 459.50**<br>**$ 234.00** |
| **CATEGORY 3A**<br>For those faculty or substitutes whose teaching assignment is 25% or less than a normal assignment, including faculty on unpaid leave. | **CTA Dues**<br>**NEA Dues** | **$ 239.75**<br>**$ 83.50** |
| **CATEGORY 3B**<br>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. | **CTA Dues**<br>**NEA Dues** | **$ 239.75**<br>**$ 133.50** |
| **CATEGORY 4**<br>For those adult education and community college employees employed only on a part-time or hourly basis. | **CTA Dues**<br>**NEA Dues** | **$ 107.90**<br>**$ 83.50** |

**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**

**2026-27 DUES SCHEDULE**

**BASED ON ANNUAL SALARY**:

| | | |
|---|---|---|
| **Category 1** | | |
| $60,000 and OVER | **CTA Prof. Dues** | **$ 899.00** |
| | **NEA Prof. Dues** | **$ 143.50** |
| **Category 2** | | |
| $40,000 - $59,999 | **CTA Prof. Dues** | **$ 459.50** |
| | **NEA Prof. Dues** | **$ 143.50** |
| **Category 3** | | |
| $25,000 - $39,999 | **CTA Prof. Dues** | **$ 239.75** |
| | **NEA Prof. Dues** | **$ 143.50** |
| **Category 4** | | |
| $9,000 - $24,999 | **CTA Prof. Dues** | **$ 173.82** |
| | **NEA Prof. Dues** | **$ 87.00** |
| **Category 5** | | |
| $ 0 - $8,999 | **CTA Prof. Dues** | **$ 107.90** |
| | **NEA Prof. Dues** | **$ 58.75** |
| **Associate** | | |
| Associate/CASH ONLY | **CTA Prof. Dues** | **$ 107.90** |
| | **NEA Prof. Dues** | **$ 58.75** |

**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)

## CTA/CCA MEMBERSHIP DUES

## 2026-27 DUES SCHEDULE

Dues amounts for Unified ACTIVE membership categories:

**CATEGORY 1**

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

| | |
|---|---|
| **CTA Dues** | **$899.00** |
| **NEA Dues** | **$234.00** |
| **CCA Dues** | **$ 99.00** |

**CATEGORY 4**

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

| | |
|---|---|
| **CTA Dues** | **$107.90** |
| **NEA Dues** | **$ 83.50** |
| **CCA Dues** | **$ 49.50** |

**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)

# THE CTA MEMBERSHIP DROP PROCESS TOOLKIT

**An overview of the CTA Drop Process including a drop date calculator can be found on our Membership website at: https://www.cta.org/membership/membership-2024-dropprocedures**

**What is a Valid Membership Drop Request?**

A written request to drop Local/CTA/NEA union membership must be personally submitted to the Local Chapter President by the individual wanting to drop their membership. The request can be made only by the individual member on their 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 (photocopies of signature are not acceptable)
- CTA Membership Identification Number (optional)

**Delivery:**

Letter must be delivered to the Local Chapter President via U.S. Mail or personally by hand delivery. (Chapters may also designate a local chapter office with staff to receive the document.)

**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')

# General Steps in the Drop Process

**Initial Interaction:**
Member notifies RRC/UniServ/CTA Headquarters/Site Representative via phone, text, in person, or via email that they would like to drop their CTA membership. Whoever receives the call, text or email confirms membership and maintenance of dues anniversary date if applicable. The member is informed that a drop request must be sent by U.S. mail or hand-delivered to the Local President or dropped at local chapter office if designated by the Chapter. N*otify Local Chapter and staff that a member inquired about dropping.*

**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.

**15 Working-Day Processing Timeline Begins:**
Notification to Local President and contact logged at CTA office, and the 15 working-day processing deadline begins.

**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 go through with it. Either way, the ultimate decision to stay or leave the union should then be shared with the RRC, UniServ and CTA Membership Department. In the case of a drop, send the drop letter, drop reason, and verification of conversation to CTA Membership Accounting for final system updates and formal confirmation back to the individual and district.

**See the Drop Scenarios for specific steps in the process.**

# MEMBERSHIP DROP SCENARIOS

There are several different scenarios based on membership status and maintenance of dues. Five common scenarios have been identified along with the role and responsibility of the Member, the local leader, Field Staff and Membership Accounting Department. You are encouraged to review these scenarios and understand your role to ensure a smooth process by all involved.

**Scenario 1**: Individual wants to drop membership.

**Status**: Member with no Maintenance of Dues (MoD).

| Ability to Drop Membership | Ability to Revoke Dues | Membership Drop Protocol | Chapter Response and Process | Membership Accounting Process |
|---|---|---|---|---|
| At any time. | At any time. | Individual must notify chapter president in writing via US mail or hand delivery with the following information:<br>• Name<br>• Home Address<br>• Name of Local Chapter<br>• CTA ID, if known<br>• Request to Drop Membership<br>• Signed and Dated | 1. Verify Maintenance of Dues (MoD) status. If no MoD, proceed. If MoD, see Scenario 2.<br>2. Chapter president and/or PCS schedule follow-up within 15 days to have a conversation regarding request, resolve concerns and encourage the individual to retain membership.<br>3. If retainment efforts are successful, memorialize the conversation in writing to the individual and confirm that their member status will remain as active.<br>4. If retainment efforts are unsuccessful, send the following, within 15 days, to Membership Accounting (email, fax or mail):<br>• Member drop letter<br>• Drop reason – Short explanation which will be entered into member record for future reference.<br>• Verification of conversation – A note indicating someone talked to the individual.<br>• Membership Accounting will follow-up with the chapter president/PCS if these items are not included in the communication regarding the drop. | 1. Verify MoD status.<br>2. Verify all membership drop documentation has been received from local.<br>3. Send letter to district to cease deductions, cc: chapter president. Monitor district compliance.<br>4. Send letter to individual to confirm membership drop, cessation of dues deductions. cc: chapter president and PCS.<br>5. Update individual status in Falcon to Non-Member, Dropped.<br>6. File all documentation. |

**Scenario 2:** Individual wants to drop membership and is **not** within the dues revocation window to cease dues.

**Status:** Member **with** Maintenance of Dues and Active membership. *Note: These members have signed a new enrollment form or commitment card.* See Scenario 3 for dues authorization revocation protocol when the member is within the revocation window.

| Ability to Drop Membership | Ability to Revoke Dues | Membership Drop and Dues Revocation Protocols | Chapter Response | Membership Accounting Process |
|---|---|---|---|---|
| At any time. | Only in window period, as determined by signature date on Commitment Card or new membership form (2018-19 or newer). | **Drop Membership:**<br><br>Individual must notify chapter president in writing via US mail or hand delivery with the following information:<br>• Name<br>• Home Address<br>• Name of Local Chapter<br>• CTA ID, if known<br>• Formal statement to drop Membership<br>• Signed and Dated<br><br>**Revoke Dues Authorization:**<br><br>Not eligible to revoke dues authorization until revocation window. | 1. Verify Maintenance of Dues (MoD) status.<br>2. Chapter president and/or PCS schedule follow-up within 15 days to have a conversation regarding request, resolve concerns and encourage the individual to retain membership.<br>3. Notify individual that dues deduction will continue and they need to send their request to cease dues/to revoke their dues authorization in writing to CTA Membership Accounting to be received within the opt out window. Explain MoD and the dues authorization revocation window as necessary.<br>4. If retainment efforts are successful, memorialize the conversation in writing to the individual and confirm that their member status will remain as active<br>5. If retainment efforts are unsuccessful, send the following to Membership Accounting (email, fax or mail):<br>• Membership drop letter<br>• Drop reason – Short explanation which will be entered into member record for future reference.<br>• Verification of conversation – A note indicating someone talked to the individual.<br>• Membership Accounting will follow-up with the chapter president/PCS if these items are not included in the communication regarding the drop. | 1. Verify MoD Status.<br>2. Verify all membership drop documentation has been received from local.<br>3. Send letter to individual to confirm drop of membership, and to notify of continuing dues deduction obligations until written dues revocation during revocation window. Provide anniversary date and next window period details.<br>- cc: chapter president and PCS.<br>4. Update individual status in Falcon to Non-Member with Dues Deduction.<br>5. File all documentation |

**Scenario 3:** Individual wants to drop membership and is **within** the dues authorization revocation window.

**Status:** Member with Maintenance of Dues and Active membership. *Note: These members have signed a new enrollment form or commitment card.*

| Ability to Drop Membership | Ability to Revoke Dues | Membership Drop and Dues Revocation Protocol | Chapter Response | Membership Accounting Process |
|---|---|---|---|---|
| At any time. | Only in revocation window period, as determined by signature date on Commitment Card or new membership form (2018-19 or newer). | Individual must notify chapter president in writing via US mail or hand delivery with the following information:<br>• Name<br>• Home Address<br>• Name of Local Chapter<br>• CTA ID if known<br>• Request to drop membership<br>• Signed and Dated<br><br>**Note**: If the member is within their dues authorization revocation window when this letter is received by the local, this letter is sufficient to drop membership and revoke dues authorization at the same time. | 1. Verify Maintenance of Dues (MoD) status.<br>2. Chapter president and/or PCS schedule follow-up within 15 days to have a conversation regarding request, resolve concerns and encourage the individual to retain membership.<br>3. If retainment efforts are successful, memorialize the conversation in writing to the individual and confirm that their member status will remain as active<br>4. If retainment meeting is unsuccessful, send member drop letter, drop reason and verification of conversation to Membership Accounting within 15 days (email, fax, or mail):<br>• Member drop letter<br>• Drop reason – Short explanation which will be entered into member record for future reference.<br>• Verification of conversation – A Note indicating someone talked to the individual.<br>• Membership Accounting will follow-up with the chapter president/PCS if these items are not included in the communication regarding the drop. | 1. Verify MoD Status, dues authorization revocation window.<br>2. Verify all drop documentation has been received from local.<br>3. Send letter to district to cease deductions, cc: chapter president. Monitor district compliance.<br>4. Once all documentation is verified, send letter to individual to confirm drop of membership, cessation of dues deduction. cc: chapter president and PCS.<br>5. Update individual status in Falcon to Non-Member.<br>6. File all documentation. |

**Scenario 4:** Individual has already dropped membership and is now within the dues authorization revocation window.

**Status:** Non-member with Dues Deduction. See Scenario 2.

| Ability to Drop Membership | Ability to Revoke Dues | Dues Revocation Protocol | No Chapter Response | Membership Accounting Process |
|---|---|---|---|---|
| N/A | Only in revocation window period, as determined by signature date on Commitment Card or new membership form (2018-19 or newer). | **Revoke Dues Authorization:**<br><br>Individual must send written notice to revoke their dues authorization or use term "drop membership" or similar via mail to CTA Membership Accounting to be received during the individual's specific revocation window. | No chapter response required in this scenario.<br><br>The chapter has already had a conversation with the individual when the request was made to drop membership. Now the individual is within their revocation window and would send a letter directly to Membership Accounting stating their intent to now revoke their dues authorization. | 1. Validate dues revocation window.<br><br>2. Send letter to district to cease deductions. cc chapter president. Monitor district compliance.<br><br>3. Send letter to individual to confirm dues cessation. cc: chapter president and PCS.<br><br>4. Update individual status in Falcon to Non-Member, Dropped.<br><br>5. File all documentation. |

**Scenario 5:** Individual requests to drop membership and/ or revoke dues authorization and is within the dues authorization revocation window. Individual sends request letter directly to CTA Membership Accounting.

**Status:** Member with Maintenance of Dues.

| Ability to Drop Membership | Ability to Revoke Dues | Membership Drop & Dues Revocation Protocol | CTA & Chapter Response | Membership Accounting Process |
|---|---|---|---|---|
| At any time. | Only in revocation window period, as determined by signature date on Commitment Card or new membership form (2018-19 or newer). | If an individual mails or delivers a letter to CTA Membership Accounting directly, and is within the dues authorization revocation window, the request will not be immediately processed, and is pending member notice to local chapter and local chapter verification. The individual must initiate the notice with their chapter president.<br>**Request must include:**<br>• Name<br>• Home Address<br>• Name of Local Chapter<br>• CTA ID if known<br>• Request to drop membership and/or dues revocation<br>• Signed and Dated<br><br>**Note**: If the member is within their dues authorization revocation window when this letter is received by the chapter president, this letter is sufficient to drop membership and revoke dues authorization at the same time. | CTA Membership Accounting Response:<br>1. Verify Maintenance of Dues (MoD) status.<br>2. CTA Membership Accounting to send a letter to individual stating that membership must be dropped via the chapter president and explain the process. cc: chapter president and PCS.<br>3. Membership Accounting emails chapter president and PCS indicating that a membership drop and/or dues authorization revocation request has been received and outline next steps for the local.<br>4. Within 15 days, chapter president and/or PCS contact the individual to have a conversation regarding request, resolve concerns and encourage the individual to retain membership.<br>5. If retainment efforts are successful, memorialize the conversation in writing to the individual and confirm that their member status will remain as active.<br>6. If retainment efforts are unsuccessful (including if member is unresponsive), the individual still must submit a letter indicating their desire to drop membership. Once this letter is received by the chapter president, communicate in writing to CTA Membership Accounting the results of the conversation and the drop reason and send a copy of the drop request. If the drop request is dated and signed within the dues authorization revocation window, this also satisfies the requirement to revoke dues. | 1. Verify MoD Status and dues authorization revocation window.<br><br>2. Verify all drop documentation has been received from local.<br><br>3. Send letter to district to cease deductions. cc: chapter president. Monitor district compliance.<br><br>4. Send letter to individual to confirm drop of membership and cessation of dues deduction cc: chapter president and PCS.<br><br>5. Update individual status in Falcon to Non-Member.<br><br>6. File all documentation. |

# DROP PROCESS AND MAINTENANCE OF DUES: QUESTIONS AND ANSWERS

**How do I drop my membership?**

We encourage you to maintain your membership. Our effectiveness in bargaining fair and just salaries, benefits, and working conditions is directly related to member support and the power we have in our collective voice. Increasing funding to public schools, reducing class sizes, and ensuring that professional rights such as due process and permanent status are protected are direct results of the important work we have been able to accomplish because of a united CTA membership.

If you still decide you'd like to drop your union membership, you just need to put your request in writing. The letter will need to be mailed or hand-delivered to your Local Chapter President. The letter must include a stated formal request to drop membership, your full name, home address, local chapter name, date and original signature. If you happen to have your membership ID number, that would be appreciated. We have many members with the same or similar names, and we need to be sure that we are responding to a request from the correct member.

**When can I drop my membership?**

Members can drop their membership at any time. You just need to put your request in writing. The letter will need to be mailed or hand-delivered to your Local Chapter President. The letter must include a stated formal request to drop membership, your full name, home address, local chapter name, date and original signature. If you happen to have your membership ID number, that would be appreciated.

**Does this ruling mean I can drop my membership and not pay dues?**

You could, but that would be exactly what the forces behind this court case want. The corporate special interests, billionaires and politicians want to weaken the ability of working people to come together in unions to negotiate on behalf of their members and, in our case, to stand up for our students and for public education. It's part of a broader scheme to rig the system against working people.

**Would I get the same benefits if I dropped my membership?**

No. You immediately lose any voice in your union and the right to vote on the contract. The union would still negotiate your salary, benefits and working conditions, but you would have no say in those discussions. You will also be ineligible for all the benefits that come with membership, including a $1 million personal liability policy, legal services, access to teacher-led professional development, and membership discounts on insurance, entertainment, and travel.

**When I drop my membership, are my dues automatically stopped?**

This depends on if you have signed a membership form or commitment card that includes the maintenance of dues provision. If there is no maintenance of dues provision, then yes, your dues automatically stop. If you agreed to maintain dues annually, then you must also notify the California Teachers Association to stop dues payments. This can be done not less than 30 days and not more than 60 days before the member's annual anniversary date by mailing a written notice to CTA Member Services in Burlingame. The written notice must include the member's full name, address, local chapter name, authentic signature and date.

**So, I dropped my membership — how do I stop paying continuous annual dues?**

This can be done not less than 30 days and not more than 60 days before the member's annual anniversary date by mailing a written notice to CTA Member Services, P.O. Box 4178, Burlingame, CA 94011. The written notice must include the member's full name, address, local chapter name, authentic signature and date.

**How do I know my anniversary date?**

Your anniversary date is the date you joined CTA. You can get that information from your copy of the CTA Enrollment Form or by contacting your local chapter or CTA Member Services.

**What does not less than 30 days and not more than 60 days before my anniversary date mean?**

It means any member who has dropped membership can also stop their continuous annual dues payment in a 30-day window about a month before their anniversary date. For example, if you joined CTA on August 15, you can revoke your annual dues any time between June 16 and July 16.

**Why do I have to drop membership and dues payments separately?**

The maintenance of dues provision is a common practice used in many unions, many organizations and service agreements, and allows the union to provide ongoing support to its members and budget accordingly. It works similar to a gym membership. You join for the entire year and agree to pay for the entire year. You can choose to stop going, but you are obligated to pay for the entire term of the membership contract. Many unions only have a short window of time, such as a five-day window, to revoke dues for the following year. CTA gives members 30 days.

**Sample Pre-Drop Email for Associate Staff in Response to Member**

Dear _____:

I received your inquiry regarding changing your membership status. I am copying your local Association President, _____, and CTA Primary Contact Staff, ____, on this email so they can provide support. Logistically, any request to change membership status needs to be made in writing and hand- delivered or mailed to your chapter president or to your ***local*** Association office. The letter must include a stated formal request to change membership status, your full name, home address, local chapter name, date and your original signature.

We encourage you to maintain your membership. Our effectiveness in bargaining fair and just salaries, benefits, and working conditions is directly related to member support and the power we have in our collective voice. Increasing funding to public schools, reducing class sizes, improving school safety, and ensuring that professional rights such as due process and permanent status are protected are direct results of the important work we have been able to accomplish because of a united CTA membership.

Union membership provides many critical benefits for you and your colleagues. Only members can have input and vote on the local contract regarding learning and working conditions, salary, health care and other benefits. Members have access to an experienced attorney as needed when issues arise around discipline, credentialing questions, complaints, and layoffs. Through various local trainings and CTA conferences, members have access to teacher-led professional development, as well as scholarships for continuing their education. Members also receive $1,000,000 educators' liability insurance, retirement assistance, and numerous discounts on travel, restaurants and entertainment.

Your voice and membership are important. Please reach out to any of us if you have further questions.
*(Local Contact ) Log the inquiry.*

*If you receive an email at the local level, please feel free to use any of the above language when responding to the email. We do encourage you to localize the information.*

**Sample Email with Checklist for Chapter Presidents**

Greetings President,

You have had a member request to drop membership.

Name of Member:
Local Association:
**Commitment Date: mm/dd/yyyy**
**Drop window with MOD: mm/dd – mm/dd**
Home Phone:
Cell Phone:
Home Email:
Work Location:
Other Information:

We have referred him/her to the drop process, which requires signed notification to you. This an outline of necessary steps to take now and some ideas on how to encourage the person to remain a member:

| Checklist for CTA Drop Process | |
|---|---|
| | Contact your Primary Contact Staff immediately (cc'd on this email) |
| | Confirm if the member has a **commitment date**. Drop requests processed outside of the drop window will be required to continue to remit dues payments. |
| | If you don't know the member, reach out to the person's site rep to see if there was anything that triggered the drop and what can be done to reverse it. |
| | Set up a one-on-one meeting (with you, or the rep, or another member, or your PCS) with the member to discourage the drop and demonstrate the power of staying in the union. |
| | Send/bring member information about benefits of union (CTA Leader Resources) |
| | Have the person sign the "Voluntary Termination of Benefits" if you cannot convince them to remain a member. |
| | If you do convince them to remain a member, confirm back to CTA Membership to close out the drop inquiry. |
| | If member does decide to drop, provide verification of contact and the reason(s) why back to CTA Membership Accounting. See Next Step. |
| | Process drop request within 15 working days of the request if you were not able to persuade the person to keep membership. You do this by sending a copy of the written drop request received by the chapter along with the drop reason to CTA Membership Accounting, PO Box 4178, Burlingame, CA 94011 or email to membership@cta.org. |

This email contains multiple resources for you to reach out to your members. The timelines to respond are short, so meeting with the member quickly is critical. If you have any questions, please reach out to your PCS right away.

**Pre-Drop Phone Script for Associate Staff/Local Association Staff in Response to Member**

Thanks for reaching out to us. I'm sorry to hear that you are looking to drop your membership.

*Get Name from caller and look up in Falcon/CTA360. Validate the caller's Home Address, Home Email, Home Phone and Cell Phone and update Falcon as necessary. Confirm if they have a maintenance of dues agreement. If they do, also note the anniversary date.*

You know, our ability to bargain fair and just salaries, benefits, and working condition is directly related to the power we have as a collective voice. That's why your membership is important. Only members can have input and vote on the local contract. Through various local trainings and CTA conferences, members have access to teacher-led professional development, as well as scholarships for continuing your education. Members have access to an experienced attorney if issues arise around discipline, credentialing or layoffs. Members also receive $1 million educators' liability insurance, retirement assistance, and numerous discounts on travel and entertainment.

Would you like (Association President) or (Primary Contact Staff) to give you a call to talk further?

- ✓ *If yes, end the call and give the message to President/staff. Log the inquiry.*
- ✓ *If no/they insist upon dropping membership, let them know they need to put the request in writing and mail or drop off at the Association office (assuming there is an office). Provide the mailing address. Email president and staff to let them know. Log the inquiry.*

The letter will need to be mailed or hand-delivered to your Local Chapter President. The letter must include a stated formal request to drop membership, your full name, home address, local chapter name, date and original signature.

Conversation Guidance for One-on-Ones
With the *Janus v. AFSCME* decision, CTA is at a critical point in our history. Our success in staving off this unprecedented attack on our Association and all it does for our members is dependent on personalizing the experience of being part of the Association. When members want to drop their membership, it is critical that we find the right person to talk to them about their decision. It's easy to say no to a nameless/faceless person. It's hard to let down those you care about.

**LEA/CTA/NEA:**

Use the **Voluntary Termination of Membership Rights and Benefits Form** and the "Member vs. Nonmember" flyer to guide the member through all that they lose when they terminate their CTA membership. Use your personal knowledge of the person to highlight the parts of the form that would be most persuasive to them. Stress throughout the conversation that being part of the union is how we fight together for a better profession, wages, benefits, and working conditions.

**Listen to concerns:**

Listen to the concerns of the member. Be patient and kind. Do **NOT** attack or belittle the member. Try to pinpoint why the member is dropping. Use the "Answering the Tough Questions" Guide to counter the various reasons why they want to drop their membership.

**Conversation Style:**

It is important to be yourself and keep your conversations earnest. The "Feel, Felt, Found" conversation is an effective one-to-one conversational frame for dealing with objections or hesitation on the part of potential members. If you approach a potential member with an invitation to join your local association and are met with "I really don't see any reason to join," use the following conversational frame to keep the conversation going:

FEEL *"I know how you feel."*

"Hey, I get it. I never gave unions much thought either. I guess I thought I could take
care of myself in just about any situation."

FELT *"I have felt the same way myself."*

"In fact, I was pretty resentful when a union rep convinced the principal that I wasn't
experienced enough to handle an upper-grade class."

FOUND *"But I found that…"*

"It turned out, though, that the union really helped when I had a payroll dispute with the district. When the district refused to place me on the correct salary step, the union hired a lawyer and the district ended up owing me a lot of money for back
pay."

# MEMBERSHIP NOTES


CALIFORNIA
Union
Labor
TEACHERS ASSN