

PTA is a membership association, and membership is the heart of PTA. Crucial to any PTA's health and success is a membership that is representative of its community. Along with the entire board, the president and the membership vice president or chairman are partners in guiding and directing the membership committee in an effective and successful yearlong membership campaign and in growing a membership that is representative of the entire community.

Every PTA/PTSA should have a position dedicated to membership, whether it be a chairman or vice president.

The unit, council and district PTA membership chairmen/vice presidents are either appointed or elected by their respective executive boards.

The major responsibilities of the membership chairman/vice president are:

1. Make membership growth and retention a prioritized goal of the PTA;
2. Collect and reconcile membership dues with financial officers;
3. Distribute membership cards; and
4. Provide regular membership reports.

Each member of the membership committee has a vital role to play in the ongoing membership promotion and must always be included and involved in all aspects of the committee's goals, duties and responsibilities.

The major responsibilities of the membership committee are:

1. Create a plan that attracts new members and retains previous members;
2. Build an informed and active membership that supports the PTA's mission, goals and programs;
3. Promote and celebrate successes with members and within the community;
4. Develop an outreach component within the campaign for underrepresented groups;
5. Identify barriers to involvement such as language, culture, childcare, transportation, etc.; and
6. Include a student involvement element in the campaign.

The membership committee should meet before the beginning of the school year to establish the membership goals, design the membership and outreach promotion, and plan yearlong duties and activities. Create a marketing plan that promotes your PTA's successes and the work of the PTA so that new members will be informed and attracted to join, and current members will be motivated to renew their membership. The membership plan must be approved by the executive board.

Consult the *California State PTA Toolkit*, the California State PTA website and National PTA *Quick-Reference Guide* for

additional information on how to be an effective membership chairman/vice president.

Contact council or district PTA for current membership information, council or district due dates for per capita remittances, awards and recognitions offered and PTA materials. Refer to [www.capta.org](http://www.capta.org) and the California State PTA "List of PTA Materials" to order free membership brochures.

Attend PTA workshops designed to train and assist membership chairmen/vice presidents.

### **CREATE A MEMBERSHIP DEVELOPMENT PLAN AND CALENDAR**

The following guidelines are meant to help membership chairmen/vice presidents develop and implement effective membership campaigns.

Obtain a procedure book from the previous membership chairman (Refer to the *California State PTA Toolkit*, Procedure Book 2.3.4). Meet with the PTA president and membership committee: treasurer, room representative coordinator, publicity and hospitality chairmen, school administrator, teacher and student (PTSA).

Study last year's membership committee plan results. Set goals. Prepare a budget.

Adopt a membership theme and discuss an appropriate challenge/goal.

Create a membership calendar. Consider due dates set by council (if in council) and district. September and October are usually designated as PTA membership campaign kickoff months but membership recruitment activities should take place all year long. California's membership year begins on July 1 and ends on June 30.

Plan a membership promotion campaign that uses a variety of methods and outreach activities to promote the value of PTA.

Present the yearlong membership plan to the executive board for approval. Enroll all members of the executive board at the first meeting (all officers and chairmen must be members of the PTA).

Contact the council or district PTA to determine the cost of membership envelopes. Order envelopes prior to the campaign kickoff. Membership cards are provided at no cost by council or district PTAs.

Develop a plan that ensures that every member receives a membership card.

Refer to the unit's bylaws or contact council or district PTA for per capita remittance due dates. Per capita for the minimum number of members (15) must be received by the district PTA by November 15 of each year. December 1 is the last day a district PTA may remit a unit's per capita to keep that unit in good standing.

## IMPLEMENTING THE MEMBERSHIP CAMPAIGN

Announce the membership theme.

Create an invitation letter that includes information about the membership campaign, accomplishments of your PTA in support of students and families, benefits of membership, and information about the organization as a whole. Include PTA contact information.

Send invitation letters along with membership envelopes home with all students for family members to join PTA/PTSA. Translate invitations as needed. (Refer to the *California State PTA Toolkit*, Sample Letter, Fig. 3-1.)

Include the membership invitation letter and envelope in the new school year first-day packet.

Encourage the return of all membership envelopes, full or empty, by recognizing all students for their efforts.

Send invitation letters to teachers, administrators, school board members, leaders of diverse community groups, community members, and other friends of PTA, including past PTA presidents and board members. (Refer to the *California State PTA Toolkit*, Sample Letter, Fig 3-2 – 3-5.)

Create and display membership posters. Promote the theme throughout programs and activities.

Include student involvement in your campaign promotions and activities.

Provide information about PTA's purpose and activities. Use as many methods of communication as possible.

Use mail or e-mail, when appropriate. If using e-mail, make sure the message is delivered to everyone.

Submit articles to the PTA or school newsletter, website and local newspaper(s) throughout the year. Include PTA contact information for those wishing to join. Refer to Sample Press Release Fig. 6-3.

Send public service announcements to local TV and radio stations.

Post fliers on public bulletin boards. Visit National PTA's website, [www.pta.org](http://www.pta.org), for membership marketing tools and templates.

Translate articles into other languages, as needed.

Set up a PTA membership and information table at school registration and at all school and PTA events.

Welcome everyone and encourage involvement at open house, back-to-school and PTA association meetings.

Create a welcome packet to distribute to new families throughout the year. Include an invitation to join PTA, meeting dates and description of PTA programs and projects. Have them available in the school office for late registrants and families who join the school community at other times during the school year. (Refer to the *California State PTA Toolkit*, Creating a Welcome Packet, 3.4.2.)

## DUES COLLECTION

Contact the school principal to establish the process for the daily collection of membership envelopes without taking away valuable classroom time.

Check into school procedures regarding specific distribution and collection of school materials. Develop a process acceptable to school staff for the collection of membership envelopes. For example, membership envelopes can be sent to the office along with routine school paperwork.

Collect membership envelopes promptly each day. The staff should not be responsible for this money.

Assign at least two people to count cash and checks. One should be a financial officer or a chairman. Have all those involved in counting money verify and sign the Cash Verification form. (Refer to the *California State PTA Toolkit*, Forms 9.) Forward promptly to the treasurer or financial secretary of the PTA.

Ensure that per capita is forwarded regularly – at least monthly. California State PTA must receive membership remittances of per capita by December 1 for a unit to remain in good standing.

## ONGOING DUTIES

Fill in the membership cards with the PTA name, the National PTA unit identification number (available from the district PTA), the member's name, the date the member joined and the annual expiration date, October 31. Membership cards can be completed by hand or, printed using Just Between Friends or any customized or independently developed card template.

Members should receive their membership cards promptly and be encouraged to sign the card immediately. Remember – one member, one card, one dues payment – not “Family of \_\_\_\_” or “Mr. & Mrs. \_\_\_\_”

Alphabetize and retain membership envelopes or membership applications for at least one year.

Maintain a printed list/directory of members, updating as new members are enrolled. Provide copies to the unit president, and secretary. The membership list should be available at association meetings to determine who is eligible to vote and be provided to the nominating committee. The list of the association shall be for the exclusive use of the organization and shall not be available for distribution or purchase by any other organization or commercial entity.

Check the previous year's membership list and reach out to those who have not yet joined PTA by making a personal contact.

Request additional membership cards from the council or district PTA, as needed after remitting per capita equal to, or almost equal to, the amount of cards in the unit's allocation.

Provide a membership update at each PTA board and association meeting and reconcile with the treasurer.

Make efforts to qualify and/or apply for available awards. (Refer to the *California State PTA Toolkit*, Membership Awards and Recognition 3.8.)

Review and update the records of membership activities.

**END OF TERM**

Bring the membership procedure book up to date for the incoming membership chairman/vice president.

Evaluate the year's program and make written recommendations for the coming school year.

Provide a final membership list to the unit president and secretary. Retain a copy for the membership procedure book. The membership list should be kept for a period of three years.

Make sure that all membership enrollment records are in order, accurate and balance with the treasurer's records. (Per capita that is discovered during the summer audit not to have been forwarded during the year must still be forwarded during the next year.)

Turn over all membership materials and procedure books to next year's membership chairman/vice president or president. These records should include an accurate financial accounting of per capita dues sent to the council or district PTA; an outline of the year's activities; a copy of the membership list; a roster of the membership committee, complete with addresses and telephone numbers; a copy of the evaluation with recommendations; and any membership resources.

**SPECIAL CONSIDERATIONS FOR YEAR-ROUND SCHOOLS**

PTA/PTSAs in year-round schools should consider the following when developing their membership procedures and calendars:

- Appoint volunteers to the membership committee who represent all tracks at the school.
- Assign members of the committee to oversee and support the membership campaign for each track.
- Review the membership budget. Additional funds may be required.
- Schedule the membership enrollment period to overlap a "track-on" and "track-off" period. For some schools, this will provide all tracks an opportunity to participate within a two-to-four week period.
- Begin the membership campaign with an event all tracks are able to attend. Some year-round education schedules allow for all tracks to be in attendance at school on the same day. Otherwise, schedule a weekend activity.
- Set up a PTA information and membership table near the school entrance on the first in-track day of each track.
- Communicate with families that are "off-track" during the membership enrollment period to keep them informed about membership activities, and encourage them to join PTA.
- Consider ordering membership envelopes a year in advance. Color-code the membership envelopes to identify the different tracks.
- Make sure the membership campaign is visibly promoted during every track and throughout the year.

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**MEMBERSHIP ACTIVITIES CHECKLIST**

- Discuss and decide on your PTA's membership theme and membership goal.
  - Publicize it in many ways: on your website, in a registration packet, issue a press release, display posters at school.
  - Visually represent your goal and its progress a prominent place.
  - Consider either the California State PTA membership challenge as a goal, or set your own.
- Include your membership invitation in the school's summer mailing or newsletter.
  - Have the invitation available in the office for late-registering families as part of a welcome packet.
- Include the following in your invitation letter:
  - Information about your campaign (theme, goals, anyone can join);
  - What your PTA has provided/plans to provide for the school and community;
  - What membership means (benefits of being a member, having a voice); and
  - Reference to the other levels of PTA and what they offer.
- Create a teacher/staff-specific invitation to encourage staff membership.
  - Ask your principal to join PTA and promote PTA membership to the staff.
  - Think about offering a particular incentive to encourage staff participation.
  - Advise staff about the teacher and nurse continuing education scholarships available through California State PTA.
- Discuss who is not represented in your PTA and make a plan for outreach to the community, including non-family members and others.
  - Identify those who are not members but should be included so that your PTA truly reflects your community.
- Include PTA contact information in every PTA or school newsletter for those interested in joining or getting in touch and make sure the office provides contact information to those who request it.
- Set up a membership table at every PTA and/or school event with brochures or other giveaways to inform people about PTA. Include events such as:
  - Registration days and/or orientations for new students/parents; and
  - Student performances and other events at school.
- Use PTA brochures and other resources to promote/market PTA and explain the benefits of PTA.
- Make sure that every member receives his or her individual membership card.
- Keep a membership list with contact information for all members.
- Contact previous year's members if they do not re-join to make a personal "ask".
- Report regularly at PTA meetings on the membership total and additional memberships received.
- Regularly remit all per capita/dues for new memberships to the unit treasurer and make sure they are forwarded through channels (at least monthly).

