

Membership is the heart of PTA. Along with the entire board, the president and the membership chairman are partners in guiding and directing the membership committee in a successful membership campaign.

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

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 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. The membership plan must be approved by the executive board.

Consult the *California State PTA Toolkit* and National PTA *Quick-Reference Guide* for additional information on how to be an effective membership chairman, responsibilities of the membership chairman, how to conduct productive committee meetings, membership committee goals, and sample objectives for membership development.

Contact council or district PTA for current membership information and PTA materials. Refer to 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.

CREATE A MEMBERSHIP DEVELOPMENT PLAN AND CALENDAR

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

Obtain a procedure book from the previous membership chairman (Refer to the *California State PTA Toolkit*, Procedure Books 2.3.4). Meet with the PTA president and membership committee: membership chairman, 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.

Create a membership calendar. Consider due dates set by council (if in council) and district. September and October are designated as PTA membership campaign kickoff months.

Refer to the *California State PTA Toolkit*, Membership section, for additional information and details.

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

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

Present the year-long membership plan to the executive board for approval.

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.

Refer to the unit's bylaws or contact council or district PTA for per capita dues financial due dates.

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. Provide some extras for diverse families' needs (Refer to the *California State PTA Toolkit*, Sample Letter, Fig. 3-1).

Include the membership 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, community members, and other friends of PTA, including past PTA presidents (Refer to the *California State PTA Toolkit*, Sample Letter, Fig 3-2 – 3-5).

Include the following in your membership calendar:

DUE DATES	COUNCIL	DISTRICT PTA	STATE (Postmarked)
First Required Remittance	_____	November 15	December 1
Final Remittance	_____	_____	March 31
Early Bird Award	_____	_____	November 1
Chairman's Club Award	_____	_____	November 15
Membership Challenge Award	_____	_____	March 31

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

Send public service announcements to local TV and radio stations.

Post flyers on public bulletin boards. Visit National PTA's website, www.pta.org for membership marketing tools and templates.

Translate articles into other languages, if 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 meetings, welcome everyone and encourage involvement.

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.

Ensure that per capita is forwarded regularly – at least monthly. The required first remittance due date is December 1 to remain a “unit 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 issued and the annual expiration

date, October 31. Membership cards can be printed using the Online Membership Data Reporting (OMDR Plus) system found on the National PTA website.

Members should receive their cards promptly and be encouraged to sign the card immediately. Remember—one member, one card, one dues payment – not Mr. & Mrs.

Retain and alphabetize membership envelopes or membership applications.

Maintain a printed list/directory of members, updating as new members are enrolled. The list can be created using OMDR. 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.

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.

Provide a membership update at each PTA board and association meeting.

Make efforts to qualify and/or apply for available awards (Refer to the *California State PTA Toolkit*, Membership Awards 3.7).

Review and update the records of membership activities.

END OF TERM

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

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 3 years.

Make sure that all membership enrollment records are in order, accurate and balance with the treasurer's records.

Turn over all membership materials and procedure books to next year's membership chairman 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.
- Include a membership letter and envelope in the new school year first day packet (Refer to the *California State PTA Toolkit*, Sample Letters Fig. 3-1).
- Set up a PTA information and membership table near the school entrance on the first in-track day of each track.
- Extend the membership campaign to allow sufficient time for parents from all tracks to join. Remember, membership is a year-long activity.
- 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.
- Evaluate the membership campaign when the enrollment period is finished. The chairman may want to compare the campaign with those of other schools in the district PTA that are also on a year-round education schedule for new ideas and input.
- Designate the membership enrollment month according to the PTA’s needs. Remember to meet all due dates for membership remittance.

10/2008