

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 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.

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.

Each PTA membership chairman should keep a list of the current members. A copy of the membership list shall be kept on file with the president, secretary, treasurer and membership chairman.

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.

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

### **CREATE A MEMBERSHIP DEVELOPMENT CALENDAR**

The following guidelines are meant to help membership chairmen develop and implement effective membership campaigns. The council membership chairman should be familiar with the unit and district PTA membership chairman responsibilities.

Obtain procedure book from previous membership chairman (Procedure Books 2.3.4, 38).

Meet with 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. September/October are designated as PTA membership enrollment months.

Plan a membership promotion campaign.

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

Contact council or district PTA for current membership information and PTA materials. Refer to [www.capta.org](http://www.capta.org).

Attend PTA workshops designed to train and assist membership chairmen.

Contact the council or district PTA to determine the cost of membership envelopes. Order envelopes. Membership cards are provided at no cost by council or district PTAs. Contact council or district PTA for per capita dues financial deadlines.

### **IMPLEMENTING THE MEMBERSHIP CAMPAIGN**

- Announce the membership theme.
- Use mail or e-mail, when appropriate. If using e-mail, make sure the message is delivered to everyone.
- Send invitation letters and the membership envelopes home with all students for family members to join PTA/PTSA. Translate invitations as needed. Provide some extras for diverse families' needs (Sample Letter, Fig. 3-1, 79).
- 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 (Sample Letter, Fig 3-2 - 3-5, 80-83).
- Create and display membership posters. Promote the theme throughout programs and activities.
- Have two board members, not related by blood or marriage, count all dues and forward all money promptly to the treasurer.
- Provide information about PTA's purpose and activities. Use as many methods of communication as possible.
- Submit articles to PTA school newsletter, website and local newspaper(s).
- Send public service announcements to local TV and radio stations.
- Post flyers on public bulletin boards.
- Translate articles into other languages, if needed.
- Set up a PTA membership and information table at school registration.
- At Open House, Back-to-School and PTA meetings, welcome everyone and encourage involvement.
- Include a membership letter in the new school year first day packet.

## ONGOING ACTIVITIES

Fill in the membership cards with the PTA name, the National PTA Unit ID number (available from the district PTA), the member's name, the date issued and the annual expiration date, October 31.

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.

Keep a record of all members. Update the membership list as new members are enrolled. Provide copies to the unit president, secretary and treasurer. Retain a copy for the membership procedure book.

Create a Welcome Packet to distribute to new families throughout the year. Include an invitation to join the PTA, meeting dates and description of PTA programs and projects (Creating a Welcome Packet, 3.4.2, 75).

Remind the treasurer to forward membership per capita dues to the council or district PTA every month. 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.

Submit articles to the PTA or school newsletter and websites. Remember to make membership a year-long activity.

Provide membership update at each PTA board meeting.

Plan to qualify for State membership awards (Membership Awards 3.7, 92). Make the membership list available to the nominating committee.

Share innovative strategies for outreach and recruitment by applying for the "MY PTA/PTSA" Awards Program which includes categories for: membership creativity; your outreach; parent involvement; teacher, administrators and staff; student involvement; and allied agencies and community involvement ("MY PTA/PTSA" Awards Program 7.6.2, 294; Forms 367).

The number of members is the basis for the number of voting delegates allowed for a unit at the California State PTA Convention.

Respect the privacy of PTA members by not making the membership list available to any organization other than PTA.

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, secretary and treasurer. Retain a copy for the membership procedure book.

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 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 phone 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 (Sample Letters Fig. 3-1, 79).
- Set up a PTA information and membership table near the school entrance on the first in-track day of each track.
- Extend 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

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that are also on a year-round education schedule to see new ideas and input.

- Designate the membership enrollment month according to the PTA's needs. Remember to meet all deadlines for membership remittance.

**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.

- The membership chairman and at least one other PTA board member (not related by blood or marriage) should count the money received each day in the returned membership envelopes.
- Use the Cash Verification Form to forward all dues immediately to the treasurer (Cash Verification Form 5.3.4, 222; Forms 389).

<b>AWARD DEADLINES</b>	<b>COUNCIL</b>	<b>DISTRICT PTA</b>	<b>STATE</b>
Early Bird	_____	_____	November 1 (postmarked)
Chairman's Club	_____	_____	November 15 (postmarked)
MY PTA/PTSA Award	_____	_____	February 1 (In state office)
Membership Challenge Award	_____	_____	March 15 (postmarked)
100% Membership	_____	_____	March 31 (In state office)

See the *California State PTA Toolkit* for additional information and details.

04/2005

## CASH VERIFICATION FORM

(Membership, Fundraisers, Donations)

ACTIVITY \_\_\_\_\_ DATE \_\_\_\_\_

**COINS**

\_\_\_\_\_ x 1¢ = \_\_\_\_\_

\_\_\_\_\_ x 5¢ = \_\_\_\_\_

\_\_\_\_\_ x 10¢ = \_\_\_\_\_

\_\_\_\_\_ x 25¢ = \_\_\_\_\_

\_\_\_\_\_ x 50¢ = \_\_\_\_\_

\_\_\_\_\_ x \$1 = \_\_\_\_\_

**TOTAL \$** \_\_\_\_\_

**CURRENCY**

\_\_\_\_\_ x \$ 1 = \_\_\_\_\_

\_\_\_\_\_ x \$ 5 = \_\_\_\_\_

\_\_\_\_\_ x \$ 10 = \_\_\_\_\_

\_\_\_\_\_ x \$ 20 = \_\_\_\_\_

\_\_\_\_\_ x \$ 50 = \_\_\_\_\_

\_\_\_\_\_ x \$ 100 = \_\_\_\_\_

**TOTAL \$** \_\_\_\_\_

**CHECKS**      Attach adding machine tape of itemized checks.

**TOTAL \$** \_\_\_\_\_

**GRAND TOTAL \$** \_\_\_\_\_

**Membership Dues**

# \_\_\_\_\_ members @ \$ \_\_\_\_\_ (dues) = \$ \_\_\_\_\_ + donations = \$ \_\_\_\_\_ Grand Total \$ \_\_\_\_\_

**FOR OFFICIAL USE ONLY**

Verification \_\_\_\_\_

Signature \_\_\_\_\_

Signature \_\_\_\_\_

**Amount Received: \$** \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_