

Membership - Step by Step

Procedure Book and Plan Development

- Start a procedure book if you did not get one from your predecessor
- Chairman meets with PTA president and committee
 - o Develop membership recruitment and retention plan
 - o Include outreach to those under-represented
 - o Set goals and budget, including incentive costs, mailings, etc.
- Develop calendar after contacting council or district regarding due dates
- Present plans for approval (to PTA executive board and association)
- State membership envelopes are not required but are helpful (to purchase envelopes, contact your council PTA or district PTA)
- Membership cards are provided at no cost and every member should get one

Develop Invitation

- Write invitation letter, announce theme and goals
- Use email or mail when appropriate
- Write articles for newsletters, post flyers at school
- Have new student packets in the school office

Collect Envelopes Daily and Deliver to Treasurer or Financial Secretary

- Two board members should count and record dues payments
 - o Use Cash Verification form

Issue Membership Cards

- National PTA ID # for your PTA (always has 8 digits)
- Expiration date is always October 31
- Do not use "Mr. & Mrs. Smith" or "Smith Family" (*each member = one card*)

Keep Record of All Members (including contact information)

- Update list throughout year
- Use OMDR* to enter members
- It is recommended to keep a hard copy of membership lists for three years

Report at Meetings

- Announce number of members and ensure that per capita is forwarded regularly
- If needed, request additional cards from your council or district PTA
- Continue to publicize your PTA all year long and invite people to join

Keep Procedure Book Updated

- Write final year-end report
 - o What worked?
 - o What did not work? (Include recommendations for next year)

Pass On All Materials to Successor

- Accurate accounting of number of members and dollars collected
- Complete membership list (can be downloaded from OMDR*)
- Procedure book and files
- Outline of activities, evaluation and recommendations

* Online Membership Data Reporting - National PTA database available to all PTAs