

End of term tasks for membership officers/chairmen

As the year ends, it is important to make sure that certain tasks are completed:

❑ **Make sure all per capita collected has been forwarded.**

Reconcile the membership list with the financial officers' records so that the year-end audit does not "flag" membership monies collected, but not forwarded. Should the audit find per capita that has not been remitted, it will need to be remitted through channels in the new year.

❑ **Evaluate this term's membership campaign and write a report.**

Provide details on the theme, incentives, any resources or contacts you used, any issues or problems you encountered as well as the successes you had.

Also make note of suggestions or recommendations for next term's committee.

❑ **Bring the procedure book up to date and turn it and all materials over to your successor** or the incoming president. (If you didn't get a procedure book, make one.) The procedure book should include:

- accurate accounting of members and dues/per capita sent forward
- an outline and timeline of activities
- a roster of committee members with contact information
- a copy of the membership list
- any membership resources and printed materials
- the year-end report of activities, successes and recommendations

❑ Provide a **final membership list** (with contact information) to the president, secretary and treasurer and retain a copy of the list in the membership procedure book.

❑ Check with the incoming board to see if your PTA will be using membership envelopes. If so, be sure to **order membership envelopes** from your PTA council (if in council) or the PTA district so they are available right away at the beginning of the new membership year (July 1).

❑ **Provide information** for next year's membership vice president/chairman/membership committee on:

- the theme and challenge announced at the annual convention
- how and where to order membership recruitment brochures
- the awards and recognitions that are available and when they arrive