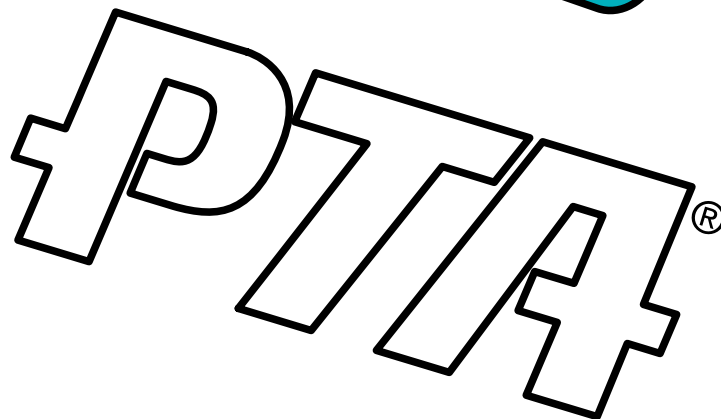
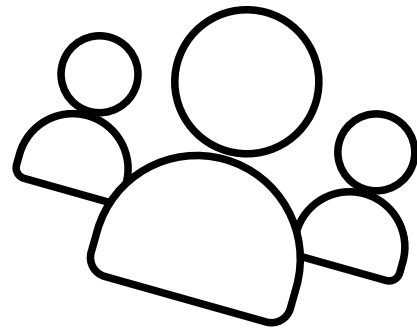
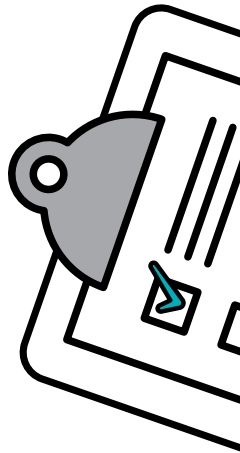
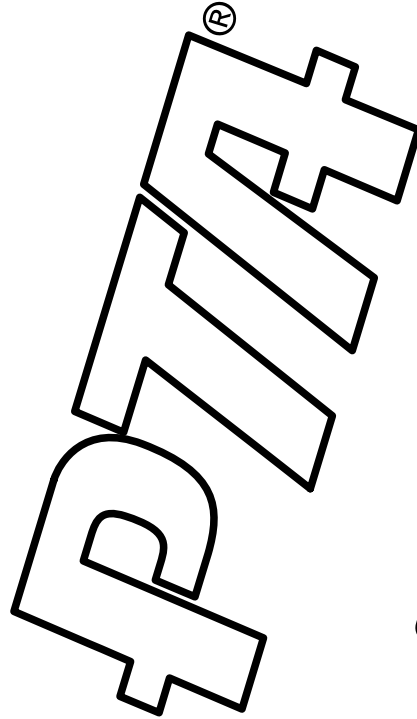
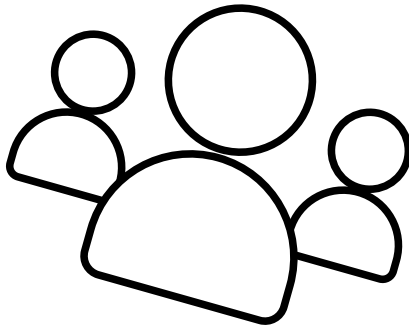




# BASICS

## Membership

Resource Guide  
2018-2019



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# Introduction

Welcome, Membership Leaders!

PTA is the largest and oldest nonprofit, volunteer child advocacy association in the country. Its purpose is to make better lives for all children and youth. As the top Membership volunteer, your primary responsibility is to help people in your community understand the value of PTA and WHY they should join PTA.

No other association is committed to making every child's potential a reality by engaging and empowering families and communities to advocate for all children.

- Other groups may focus on certain student or parent groups, PTA focuses on all children.
- Other groups may focus on test scores as a measure of success, PTA focuses on bringing to reality the potential of every child.
- Other groups may focus on making students successful through curriculum and instruction, PTA focuses on making students successful through the engagement and empowerment of parents, families and the community.

## Membership Leader Responsibilities

- Know about PTA
- Research the best way to recruit members
- Plan your year
- Recruit members
- Record and Report member information and Remit dues for them
- Celebrate your successes
- Engage members
- Keep records

# About PTA

**VISION** Every child's potential is a reality.

**MISSION** To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

## PURPOSES

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

## PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- **Standard 1: Welcoming All Families into the School Community**  
Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- **Standard 2: Communicating Effectively**  
Families and school staff engage in regular, two-way, meaningful communication about student learning.
- **Standard 3: Supporting Student Success**  
Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.
- **Standard 4: Speaking Up for Every Child**  
Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- **Standard 5: Sharing Power**  
Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- **Standard 6: Collaborating with Community**  
Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



# Getting Started

## QUICK START

As soon as you are appointed:

- Learn about being a PTA Leader. Attend training workshops at Texas PTA events, Texas PTA webinars, Officer and Chair workshops hosted by your Council PTA in your community.
- Follow Texas PTA and National PTA on social media.
- Watch the National PTA Membership Basics E-Learning Module found on the National PTA website, [pta.org](http://pta.org).
- Review and become familiar with your Local PTA's bylaws and standing rules and the Local PTA Standards of Continuing Affiliation.
- Complete FOUNDATIONS Leader Orientation before October 15. The course is initiated on the Texas PTA website, [txpta.org/training](http://txpta.org/training).
- Request previous membership records from outgoing Membership Chair, Treasurer or Secretary.
- Contact your predecessor to determine what records and information (i.e. Procedure "Book") can be obtained to know what has been done in the past. It does not always need to be a book, so it might be a flashdrive, a shared electronic document or box of files.
- Form your Membership Committee! One of the first things you should do after being appointed as Membership Chair is to find a few people to help you.
- Plan how you will recruit members. Work with your committee to make specific plans on what needs to be done, who will do it, and exactly when it will happen.
- Complete a Plan of Work. A Plan of Work is a very important part of your duties that is required of every PTA executive board member. It contains all your plans and proposed budget for the coming year. The entire executive board reads all plans and either suggests changes or approves it. This helps all of you see how you might overlap and work together.
- Start keeping your Procedure "Book" - traditional or electronic - to provide your successor with everything you and your committee members do throughout the year.



# Plan of Work Plan de Trabajo

Officer/Chairman Name:  
(Nombre de Oficial/Presidente de Junta) \_\_\_\_\_

Position:  
(Posición) **VP / Chair Membership** Year:  
(Año) \_\_\_\_\_

Reproduce as needed for the appropriate number of goals.  
(Se puede reproducir para metas adicionales.)

<b>Responsibilities / Duties:</b> (Responsabilidades)	<ul style="list-style-type: none"> <li>Recruit new members</li> <li>Inform community of PTA Purposes, policies and programs to encourage participation</li> <li>Submit dues with necessary forms to Texas PTA</li> <li>Maintain accurate records in a procedure book</li> <li>Work closely with treasurer to maintain accurate records</li> </ul>	<b>Committee Members:</b> (Miembros del Comité)	List Individual Names
<b>Goal:</b> (Meta)	<ul style="list-style-type: none"> <li>Increase total membership from last school year by 20%.</li> <li>Recruit at least 10 community members.</li> <li>Recruit at least 10 student members.</li> <li>100% Faculty membership</li> </ul>	<b>Evaluation Process:</b> (Proceso de Evaluación)	Feedback from community, executive board, and final membership results.

<b>Specific Action Steps</b> (Proceso Especifico de Acción)	<b>Start Date</b> (Fecha de Empezio)	<b>Completion Date</b> (Fecha de Terminación)	<b>Budget</b> (Presupuesto)
<b>Recruit committee members and develop membership recruiting strategy to include:</b> welcome packet for new students, recruiting display at every PTA meeting/event; membership challenge; talk to high school students, partner with community, utilize decorate school hallways as allowed	June	Ongoing	\$0
<b>Attend all executive board and regular meetings</b> and provide a report on membership	June	Ongoing	\$0
<b>Promote membership and benefits</b> through newsletter articles, website; marquee, carpool, school events, local media, Face Book	June	Ongoing	\$25 to print brochures; \$24: 2 boxes of TXPTA dues envelopes
<b>Submit dues received</b> to Texas PTA at least weekly	June	Ongoing	\$25 Postage
<b>Distribute membership cards</b> in timely manner	August	Ongoing	
Chair the <b>Life Membership</b> Committee	January	March	\$250
Oversee <b>Directory</b> committee	August	November	

<b>Resources:</b> (Recursos)	Texas PTA BASICS Membership Resource Guide, membership portion of <a href="http://www.txpta.org">www.txpta.org</a> , National PTA <a href="http://www.pta.org">www.pta.org</a> , previous chair's notes, current executive board and committee members, past membership rosters, community leaders.
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## QUICK INFORMATION

### How much are dues?

- Total dues collected per member is the sum of the following:
  - Local PTA dues = Amount per member determined by membership (check your Local PTA's bylaws)
  - Texas PTA dues = \$2.25 per member
  - National PTA dues = \$2.25 per member
- Texas and National PTA portion of dues (\$4.50 per member) are sent to Texas PTA with the membership roster
- EXCEPTION: A Texas PTA Honorary Life Member is exempt from paying the Texas PTA portion of their dues at only one Local PTA of their choice each membership year for each Texas PTA Honorary Life Membership they have been awarded They must pay the Local and National portions to be listed as members of the Local PTA.

### Where do I send the rosters and dues?

Texas PTA, 408 W. 11th St., Austin, TX 78701, Attn: Member Services

### Where do I get membership cards?

Texas PTA provides membership cards to Local PTAs during the summer based on previous year's membership totals; cards should be distributed to members immediately upon joining. Additional cards may be requested from Texas PTA Member Services.

### What is the membership year?

The membership year is August 1 through July 31. Memberships do not carry over from one membership year to another.

If someone wants to join the PTA for the coming school year at a Spring event (i.e. kindergarten round-up, 6th grade or 9th grade orientation, etc.), you have two choices of how to report those dues to Texas PTA

- Your Local PTA should hold those dues in escrow until August 1. After August 1, the rosters and Texas and National dues for those members are submitted to Texas PTA and the Local portion of the dues are reported as income for that month.
- Report those Texas and National PTA dues to Texas PTA on a separate membership roster, making sure to CLEARLY mark it as dues for the coming membership year and not the current one.

### When is the deadline to submit dues?

There is NO deadline to submit membership rosters and dues to Texas PTA. Members names and dues should ideally be reported to Texas PTA within five business days of joining, but you should report at least monthly. There are deadlines to be eligible for membership Awards. Please review those deadlines on the Texas PTA website, [txpta.org/membership](http://txpta.org/membership).

### Do members have to pay Texas and National dues at every PTA they join?

Yes. Each Local PTA is a separate non-profit association organized under the authority of the Texas and National PTAs and must be joined individually. Each member must pay the dues listed in the Local PTA's bylaws (national, state and local portions) at every Local PTA they join.

**Do “Life Members” have to pay dues?**

Recipients of the Texas PTA Honorary Life Membership are exempt from paying the Texas PTA portion of dues for only one Local PTA of their choice per membership year . If they have received more than one Honorary Life Membership, they may register as a Texas PTA Life Member with as many Local PTAs as they have Texas PTA Honorary Life Memberships.

Texas PTA Honorary Life Memberships do not carry with them automatic rights to vote or to hold office in any PTA. In order to participate actively in PTA, an honorary life member must join a Local PTA by paying the Local and National PTA dues and having his/her name included on the membership roster sent to the Texas PTA Office. Report Life Members by entering an “L” as the member type on the roster.

**Who can view membership rosters?**

PTA is a membership association. PTA respects the rights to privacy each member expects; therefore, Texas PTA, Council, or Local PTAs do not release PTA membership lists to non-members or outside interests.

**What makes a person an official PTA member?**

The members of a Local PTA are those individuals who have paid the local, state and national portions of the dues to the Local PTA, and whose names and state and national dues have been submitted by the Local PTA to the Texas PTA Office.



## **SAMPLE TIMELINE**

### **JUNE**

- Review materials from the outgoing chair, including Plan of Work and procedure book.
- Read membership materials provided by National and Texas PTA.
- Verify that Texas PTA has current executive board member contact information. This information is entered via your PTA's PT-Avenue account; membership cards will not be provided until this information is on file.

### **JULY**

- Attend membership workshops at LAUNCH.
- Attend the Texas PTA annual meeting during LAUNCH to celebrate membership awards!
- Organize membership campaign; determine incentives.
- Plan to attend all executive board meetings.
- Prepare Plan of Work. You can review a sample in this guide and download a blank template from the Texas PTA website.
- Gather materials for membership enrollment (i.e., envelopes, current dues report, current roster and current awards form).
- Request PTA information be distributed in the school registration packets.
- Review all Texas PTA awards and make appropriate plans for eligibility.

### **AUGUST**

- **THE MEMBERSHIP YEAR BEGINS AUGUST 1!**
- Send Texas PTA the roster and dues of members who joined in the spring for the coming year. Remind the treasurer to move those dues out of escrow and into the dues income line for the current year.
- Submit Plan of Work for approval.
- Ask president for membership cards that the Texas PTA Office distributed.
- Implement membership enrollment campaign.
- Ask principal for permission to distribute materials through school channels.
- Have your campaign materials ready for any pre-start events and the first day of school.
- Publicize joining via JoinPTA.org or through your school's online site.
- Inform teachers and staff on how and when dues will be collected.
- Publicize! Use all media – newsletters, newspapers, billboards, radio/TV, and the PTA and school websites - to publicize your goals and how to join. After permission from principal, publicize by displaying posters in the halls.
- Have membership tables in each homeroom and/or main hallway on the first day of school.
- Plan to have a membership table and plenty of help at first PTA meeting.
- Use posters, photos, brag boards, repeating PowerPoint presentations, videos, and artwork to draw attention to the membership campaign progress.
- Work with the programs chair to plan a parent education program.
- Prepare a packet for the school office to distribute when new students enroll.
- Send in membership rosters and dues frequently!

### **SEPTEMBER**

- Solicit support of faculty and room representatives to promote membership.
- Set up membership tables at Open House and the first PTA meeting.
- Continue to publicize membership in PTA all the time.
- Provide update on progress towards membership goals in newsletter and at PTA meeting.
- Review eligibility for membership awards listed on the Texas PTA website, [txpta.org/membership](http://txpta.org/membership).
- Send in membership rosters and dues frequently!
- Recognize members with an article in the newsletter or a shout-out on social media.

## OCTOBER

- Continue submitting membership dues, rosters, and awards applications to Texas PTA.
- Recognize members often!

## NOVEMBER

- Continue to make personal contacts with parents and teachers who have not joined.
- Plan for spring membership campaign.
- THANK outstanding members.

## DECEMBER

- Relax and enjoy the holidays!

## JANUARY

- Kick off spring campaign.
- Continue to recruit new members and try to engage those who didn't renew.
- Evaluate progress and plan new approaches.
- Continue submitting membership dues, rosters, and awards applications to Texas PTA.
- Recognize outstanding members.

## FEBRUARY

- Celebrate National PTA Founders' Day (February 17).
- Honor an exceptional volunteer with a Texas PTA Honorary Life Membership or National PTA Life Achievement Award.
- Begin preparing procedure book for the next committee chair. Collect and sort records of membership activities and copies of all recruiting materials used during the year.
- Keep submitting membership rosters and dues and stay aware of membership awards!
- Tell Outstanding members how much you love them! Have the executive board send Valentines notes to them

## MARCH

- Evaluate your progress, make written recommendations for next year.
- Keep submitting membership rosters and dues and stay aware of membership awards!
- Don't take a BREAK from recognizing great members!

## APRIL

- Don't fool around! Thank those members who have helped all year.
- Attend the Officer and Chair Trainings where available.
- Make plans to attend LAUNCH.

## MAY

- Meet with your successor and pass on procedure book and other records at end of school year.
- Ask for faculty input about contests or other incentives. This step is crucial to keep the goodwill of all faculty and staff.
- At the end-of-year awards ceremony, CELEBRATE! Show off your awards! Give a really great volunteer an award from your PTA.
- If you recruit new members during a Round-up or Open House, work with the treasurer to escrow those dues until August 1. Make a roster of those members to give to your successor.
- Meet with new president to brainstorm strategies and set goals.
- Help your successor recruit a committee to make their life easier in the coming year.
- Celebrate success!
- Breathe a sigh of relief and wish the new committee well.

# Recruiting: How to Get Members

## Preparing to Recruit

### RESEARCH

If you knew what you could say or do to convince non-members to join, how would your recruitment messages change?

Here are some ways you can gather that information:

- Research what has been successful for your PTA in the past
- Look to the membership rosters and numbers from the past, who and how many people have been members
- Look at your predecessor's procedure book. There should be records there about past recruiting and how well their plans worked.
- Survey members to see what they want from your PTA
  - Quick surveys throughout the year help determine whether the members expectations are being met. Before you start to put together your specific survey, define your survey goals. In other words, what are you trying to learn or do? Assess programming needs? Determine satisfaction with the PTA? Grow membership? Or some combination of these or other needs?
- Pick and choose questions that match your goal.
- Only ask for information you plan on addressing (ie., membership, volunteering, programs, etc).
- Keep your survey to a very few short but informative questions. Short surveys are answered more often.
- Explain the purpose of the survey and thank members for their feedback.
- Be mindful of the timing of the survey (do not send out during busy seasons).
- Send it out to a sample group prior to the larger audience.
- Send the survey out as a stand-alone document.
- Consider using Facebook, Twitter, other social media to ask just a few questions more often
- Prioritize the information you are requesting.
- Do not ask for information that can be gathered elsewhere.
- Keep all individual survey information confidential.
- Have a plan to communicate the survey results and next step plans. A sample survey is available at [txpta.org/membership](http://txpta.org/membership).
- Ask the Principal what they think would be successful in your community.
- Connect with other PTA's Leaders in your community what they've done that's been successful.
- Speak to your Council Leaders to see what suggestions they can offer.

After doing your research, focus your invitation to join your PTA on what is important to the members of YOUR community.

## PLAN

Based on your research and working with your committee, set SMART goals for recruiting members. Do you want a specific number (“A Voice for Every Child”) or a percentage increase (20% more members than last year)?



- Decide HOW to recruit members.
- Decide how members will join. Will you emphasize using [joinpta.org](http://joinpta.org) (easy for you and them) or the traditional methods - envelopes, checks, etc.?
- Pick dates and methods for first membership drive (Registrations? Meet the Teacher event? Back-to-School event? Student folders? Emails? Social Media?)
- How will new members receive their Membership Cards?
- Discuss the entire year and make plans to keep recruiting members all year long.

### Use these plans to complete your Plan of Work.

A Plan of Work helps you make your goals SMART goals. A Plan of Work is written and very specific. It helps you clearly communicate to the rest of the executive board just how you plan to recruit PTA members, report how many members you have recruited, and how you plan to help engage those members.

There is a blank Plan of Work on the [www.txpta.org](http://www.txpta.org) website and the Membership Sample is on page \_\_\_ of this guide.

## WHY JOIN PTA?

The main reason to join PTA is your child!

Use your PTA Membership to:

- **Get Connected.** PTA provides opportunities to meet and network with other parents, teachers, and school administrators. There's no better way to know what's happening in your child's school and community.
- **Speak Up.** PTA can be a way for you to be more effectively be the voice for change at your child's school.
- **Watch Yourself Grow.** As a PTA volunteer, you can use your skills and hobbies for a relevant cause while setting a good example for your child and all children in the community.
- **Give Back.** By becoming part of PTA, you will be part of the solution, to help make positive changes in your child's school and in the lives of many children.
- **Effectively Engage.** Spend quality time with your children through PTA programs, events and resources. Not only will you show how much you care about them but will also demonstrate the importance you place on their education.

\*From National PTA's Membership Basics E-Learning module. Look for this great resource in the "For Leaders" section of [www.pta.org](http://www.pta.org).

## VALUE OF PTA MEMBERSHIP

PTA is a grassroots association made up of parents, teachers and others around the state who have an interest in children, families and schools. PTA membership is as diverse as Texas is in cultures, education levels and parenting skills. By joining PTA, a member becomes part of the largest child advocacy association in the state with more than 500,000 members across Texas.

Joining PTA supports local, state and national efforts to improve the education of children and the lives of families. Membership provides the opportunity for individuals to raise their voices with others throughout the state and nation to protect children's rights. Membership ensures that PTA's voice is heard on issues affecting young people as well as providing opportunities for parent education, communication and leadership development.

Getting involved in PTA builds skills in leadership, communication and advocacy. Active members are a valuable community resource for starting and maintaining projects to benefit children.

People are more willing to join an association after understanding how it will benefit them. Be sure to promote the accomplishments of your PTA and the member benefits.

## CRAFTING YOUR MESSAGE

- 1. Hook** Begin with an interesting statement or unfinished thought. Make it personal.
  - a. We back the future.
  - b. We enable children's dreams.
  - c. We make teachers love us.
  - d. We provide children with chances.
  - e. We make legislators pay attention.
  - f. We open doors.
  
- 2. Line** Stop and Wait for the question. "What do you mean?"
  
- 3. Reel** Briefly explain your statement. Focus on what you want the listener to remember about your PTA.
  - a. We provide opportunities to expand students' horizons.
  - b. We speak up about issues important to children's health and safety.
  - c. We help support the world's toughest job – parenting.
  
- 4. Prepare** Convey the value of PTA. Describe who you are and what your PTA does. I work with the PTA to:
  - a. Help all families be engaged in the education of their children.
  - b. Open doors for student learning opportunities in math, science and technology.
  - c. Raise funds to pay for field trips and send students to museums. Our students' families would not normally be able to afford these kinds of experiences.
  
- 5. Serve** Describe why PTA is unique, how it operates, why it can provide better services.
  - a. We are the only child advocacy association that works for every child.
  - b. We engage the entire community to provide opportunities for all children.
  - c. We "build the village" that supports our students.
  
- 6. Engage** Explain why the listener should care. Explain what the listener can do.
  - a. If you join our PTA you can help us make every child's potential a reality.
  - b. You believe in students and teachers, every voice matters. Join our PTA.

## Message Do's and Don'ts

### DO:

Be conversational  
Make it personal  
Listen carefully to the response  
Show your passion  
Be prepared for the next step

### DON'T:

Sound rehearsed  
Be too general  
Walk over the listener's feelings  
Be mechanical  
Forget to close with your "ask"

Everybody can, and should, write their own recruitment message. Make them short and easy to remember and say. Get your entire PTA executive board to practice their recruitment messages at an executive board meeting.

### Sample Recruitment Messages:

- I can tell you care about children and PTA is here to help every child grow up well-educated, healthy, and able to achieve their potential in life. Our PTA does a lot of great things at the campus level and we would love to have your help, but it's not necessary. Your membership and support – your VOICE -- makes us stronger when we work with district, state, and national governing bodies to develop ways to help all of our children. Your membership can make a difference for kids. Would you join our PTA?
- No, you don't have to have a child in school. You just have to care about the future of children. No, you don't have to come volunteer on our campus. We'd love to have your help when you have time, though. We're a fun group and it's a great way to feel more connected to your campus. The most important reason to join PTA is that every voice speaking on behalf of children makes a difference. Your support is important to backing the future of all children. Would you please join our PTA?
- (For the student member)- Students are an important part of PTA. Our PTA does a lot great things to assist the students at the school. We need to hear from students to make sure we are working on things that really do make a difference. Being active in PTA not only benefits the school and other students, but it benefits YOU. You can learn leadership and life skills that will use for the rest of your life.



## Who to Recruit?

Who can join PTA? Anyone who believes in and supports our Vision, Mission and Purposes. Anyone who shares your passion for making every child's potential a reality.

It should go without saying that your entire community should be asked to be part of your PTA - not just your friends, not just previous members, not just the people who volunteer every day.

In study after study, the main reason people don't join PTA is because nobody asked them! ASK!! ASK EVERYONE!!! And recruit new members all year long. Each month, you might focus on different recruiting methods or on reaching out to different underrepresented populations (men, different cultural backgrounds, older families, students, families who have just moved to your school, community members).

On the following pages are some ideas for recruiting different groups of people. This is not an exhaustive list. The ideas listed are also rarely useful for only one group.

I'm sure you will think of more groups and more ideas. Please share your most successful ideas with the Member Services Department at Texas PTA.

### IDEAS FOR RECRUITING EVERYONE

- Just ASK! Make as many personal contacts as possible. You and your executive board should make a point of Asking people to join PTA. Carry PTA envelopes with you or show the prospective member how to find your PTA on JoinPTA.org
- Use **back the future** resources from Texas PTA
- Ask the principal's permission to send PTA information home with students or to have it on the school's website. Leave membership information in the school office to be given to new families as they enroll.
- Use every form of communication available to you - School and PTA newsletters, websites, social media, email lists, fliers, posters, bulletin boards, marquees, and signs. Walk up and down the drop-off and pickup lines. Communication is important!
- Create a welcome letter to let parents know what PTA does for the school and their children. Update every grading period or at least at mid-year.
- Hold a membership contest between classes or grade levels
- Offer discounts to members at PTA events that have fees
- Coordinate a "new family social" with the first PTA meeting of the school year. Ask them to join PTA.
- Cut a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.
- Respect people's differing schedules when you plan events.
- Publicize your PTA's past accomplishments and goals for the coming year. Create a "BRAG BOARD" with pictures and fliers and programs that you can take to meetings and all school events. Make it attractive and interesting. People will want to join an active, involved PTA.

### IDEAS FOR RECRUITING INCLUSIVELY

- Don't forget to ask groups that may not be familiar with the concept of PTA or are different in some way from previous members.
- Host a multi-cultural event
- Elect or appoint an executive board liaison to represent different parent groups (Special Education, Talented and Gifted, ELL, Grandparents raising grandchildren, etc.)
- Recruit parents and translators to help with language challenges, provide headsets, hold bilingual meetings, etc. Translate information to ensure all audiences receive your message.
- Request leaders from other cultures or communities to assist in customizing materials to best reach their community.

- Make sure meetings and communications are welcoming and accessible to everyone. Consider meeting time, location, accessibility. Consider non-traditional families.
- Create a friendly climate. Choose activities that appeal to different groups.
- Invite “Families” not just “Parents” to join you
- Arrange activity times to fit the schedules of your community. You may need to vary the times of meetings and events to fit the needs of families.
- Keep your community informed and provide information of value.
- Organize field trips, arts and craft shows, sports events and food experience days as well. (Food experience days are events where children and parents cook a meal together with ingredients provided by PTA or contributed by members or area businesses.)
- Ask teachers to talk to parents during parent-teacher conferences about the importance of PTA.
- Survey the community to determine areas of interest for programs, etc.

And above all, include everyone in invitations. A personal request to join is the most effective recruiting tool. Let everyone know you want and need them to help all children reach their potential.

### **IDEAS FOR RECRUITING MEN**

Men have held important roles in PTA throughout its long history. President Theodore Roosevelt sat on the board of directors of the National Congress of Mothers (predecessor of the National PTA). Men have served at all levels of PTA and have been some of its best volunteers and spokespersons and leaders.

Men are directly involved in the care and education of children. Research shows that “4 in 10 mothers are now the primary breadwinner, leaving the largest number of stay at home dads in history.” (Pew Research Center, “Parenting in America”, 2015) It is vital that PTA welcome and include men through programs and activities addressing their needs and concerns.

- Use gender inclusive language to promote male engagement in all communications from PTA.
- Include fathers, stepfathers, grandfathers, uncles, and older brothers; all men that play a significant role in the lives of your students.
- Seek out male leaders for leadership positions.
- Host father events, clearly stating when publicizing that children can bring a father-substitute, such as a grandfather, uncle, or close family friend.
- Ask men who are members of service clubs, religious or community organizations to serve as liaisons between the PTA and their specific group. Consider joint projects.
- Provide activities that use their talents and experiences such as career day or vocational activities.
- Sponsor an orientation for fathers at the beginning of the year with a speaker and offer ways to become involved in their child’s education.
- Create men-focused groups and events
- Communicate directly to men
- Challenge current male members to ask others to join.
- Respect men’s time
- Articulate the importance of men in education
- Celebrate their engagement
- Use the Male Engagement Toolkit at [www.pta.org](http://www.pta.org)
- Remember to apply for the MARS award from Texas PTA to celebrate your male members.



## IDEAS FOR SECONDARY SCHOOLS

- It is especially important to survey needs to be relevant in secondary schools. Include the entire community - students, teachers, administrators, counselors and other staff in membership and planning activities.
- Include parents, students, and an administrator on the membership committee.
- Send a letter of invitation to join signed by the principal, student body president, PTA president, and the membership chair. Let people know you are prepared to work together.
- Have meetings at varied times when all parents, teachers and students can attend.
- Ask the art department to assist in developing posters and displays for the membership campaign.
- Have a greeter at the door and offer the opportunity to join PTA whenever parents are at the school.
- Put notices in the school mailboxes for each teacher. Remind them that PTA supports teachers, and let them know you are grateful for their support of PTA.
- Sponsor a contest among homerooms for the greatest total of members or with 100% membership, etc. (Do not list the names of students who have or have not joined.) These awards might include the following:
  - Coupons from local merchants (free fries, ice cream cones)
  - Passes to football games
  - Refreshments during a homeroom period
- Use the school mascot in promotional activities.
- Reach out to booster clubs to help coordinate activities.

## IDEAS FOR RECRUITING STUDENTS

Students are our future. We all know that, but we often ignore that they are also the future of PTA. Students as young as those in elementary school can take on meaningful PTA tasks with adult supervision. Older students make great committee members and, in some cases, committee chairs. PTA can help them learn useful life skills while they are helping us achieve our goals.

- Elect or appoint students as executive board members. Emphasize the learning opportunities inherent in being a PTA leader
- Set up a PTA/PTSA table on student registration days and other school events. Highlight activities that benefit students.
- Publicize the Texas PTA High School Senior Scholarship requirements.
- Many Councils and Local PTAs also offer scholarships to graduating Seniors who have been involved PTA members.
- Volunteering as a PTA member can provide service opportunities and hours
- Involve students in the planning and execution of PTA events.
- Consider changing your meeting time to encourage more student participation.
- Challenge a nearby high school to a friendly student membership competition.
- Have students host the Membership table and invite their friends to join at open house, back to school night, orientations, etc.

## IDEAS FOR RECRUITING TEACHERS AND ADMINISTRATORS

Remember to keep the “T” in PTA! Teachers often have experience on that helps us be more effective and relevant in our programs. They often know which parents or family members would be a good fit for a task or PTA position. We support teachers, and we need them to support us!

- Elect or appoint a teacher to the executive board
- Enlist the help of the principal.
- Personalize invitations
- Survey all teachers mid-year asking if they joined PTA and why, and if not, why not.

- Send all teachers information about the Texas PTA Faculty Scholarships
- Remind teachers of PTA's vision, mission, purposes and that each campus is an independent PTA so joining at work is essential to support the campus even if they are a member at their child's PTA.
- Hold a grade level or departmental membership competition.
- Challenge the staff at a nearby school to a friendly competition.
- Provide monthly drawings for teachers and staff who join with donated items from local merchants.
- Reward teachers and staff with a breakfast or luncheon when 100 percent membership is achieved.

### **IDEAS FOR RECRUITING EARLY CHILDHOOD PTA MEMBERS**

An active, participating membership is vital for an early childhood PTA. In order to acquire members, the early childhood PTA must recruit creatively. Here are some ideas for help in recruiting members:

- Distribute new member packets containing fact sheets about the membership, parent education opportunities, newsletters, and activities in which your PTA is involved and a brochure about your group to every visitor. Be sure to include materials about how to join your PTA.
- Ask local pediatricians and hospitals to post or display membership information. Include PTA materials in packets that local hospitals give to new parents.
- Distribute business cards with a name to contact, which current members can give to potential members while out in the community. Your current membership is one of your PTA's best assets.
- Ask permission to post fliers in community libraries and in child-oriented businesses.
- Include meeting notices in child-oriented publications in your community.
- Send newsletters to potential members or to interested organizations that might publicize your PTA.
- Create a website and share general information about your group.
- Create a parent's guide to local preschools with information, evaluations, contact's names and contact information. Publicize the fact that your group provides this information and how interested parents can use it. Make it available to your local library.
- Provide the chamber of commerce with information about your PTA.
- Ask local businesses to use their marquee to promote your activities and events.
- Join your community welcome committee. Put your PTA information in their welcome packets.

### **IDEAS FOR RECRUITING COMMUNITY MEMBERS**

Schools are an integral part of our communities. What better way for community members to find out about what is happening in those schools than to join the PTA and support the students whose families live, work and shop in the community; the students who are the future of the community. Remind community members to **back the future** of all students.

- Provide your executive board members with membership envelopes and encourage them to take them to all community functions, events and businesses.
- Write letters to city council, elected officials, and school board members encouraging them to join
- Attend Rotary, Optimist, Kiwanis Club meetings and recruit their members
- Host a PTA table at any/every community event
- Invite senior citizens to activities such as school plays
- Incorporate local community organizations and businesses into your activities and programs.
- Ask for donations to be used as giveaways and thank them publicly for their support
- Send a letter to owners of local businesses and leaders of local organizations inviting them to join.
- Develop relationships with community groups, businesses, churches, newspapers and radio stations. Find business and commercial locations willing to display your PTA's information and to promote PTA among their employees/members.
- Request to display information at local community centers, libraries, businesses, etc.
- Ask the chamber of commerce to promote PTA in their newsletters and meetings.
- Include PTA materials in packets that local hospitals give to new parents.
- Ask a well-known local personality to serve as honorary membership chair.
- Set up a Reflections display at the local library or shopping mall.

## YOUR MEMBERSHIP COMMITTEE

Recruiting all those members can be a lot of work! This is where your Membership Committee comes in. Nobody should be the only member of a committee. Working alone is selfish and a sure way to burn yourself out. Developing a good team and working with a Committee is critical to the Membership Chair's success and sanity! It helps make better plans, accomplish goals more easily, and build future leaders.

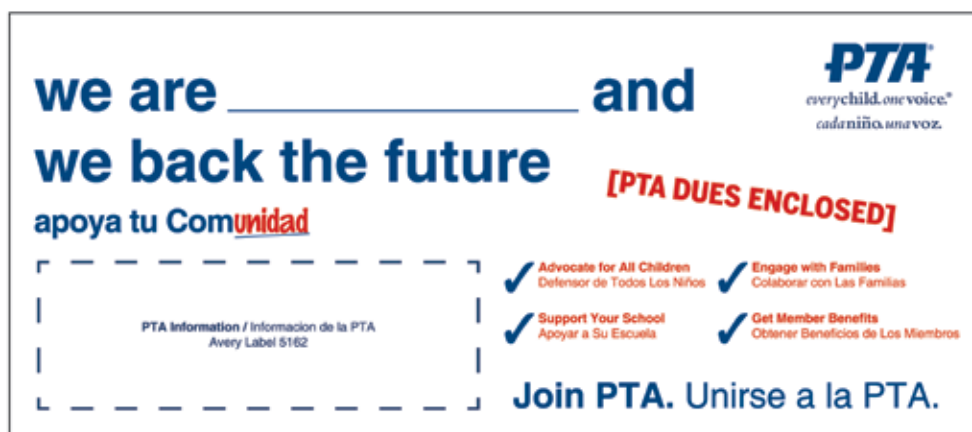
Remember -- Many Hands Make Light Work!

Here are just a few ways that Membership Committee members can contribute. I'm sure you can think of other ways for people to help you.

- Help with research and planning
- Work at the membership recruitment tables at all school and PTA events
- Serve as greeters
- Invite staff participation
- Distribute membership cards to members
- Complete the membership roster-keeping accurate records of names and contact information of those who join
- Recognize achievement
- Write thank you notes to members
- Maintain Membership recruiting in the social media
- Review and evaluate past membership efforts
- Set a goal for members to be recruited
- Send invitation to parents, teachers, past PTA officers and members, life members and other prospective members
- Create a Brag board with past accomplishments and goals for coming year
- Use PTA and school websites, as well as newspaper, radio and television and community resources to membership and the value of PTA
- Ask businesses to donate space on signboards, marquees and cable television
- Assign committee members to contact non-parent citizens/businessmen in the community to recruit as members
- Complete any other activities that the Membership Chair cannot complete alone

## RECRUITING TOOLS

Joining PTA should be easy both for members and for Membership Chairs. The membership envelope is what some members expect. PTA-branded envelopes are available for purchase in the Texas PTA store.



But why not give people choices on how they would like to join by also activating the JoinPTA.org option through PT-Avenue? JoinPTA.org allows anyone, anywhere to join online, using a credit or debit card. Out of town family members will find it especially easy to join this way.

Make it easier for all those folks to join by distributing membership envelopes (or fliers) AND activating JoinPTA.org.

Some PTAs have their own online membership site. Work with your PTA executive board to learn how to use this effectively.

## **JOINPTA.ORG**

- Free service to your PTA
- Available 24/7/365 for members worldwide
- Automated reporting and remitting
- Easy activation
- Provide routing and account number for PTA bank account
- Enter Local Dues portion of PTA dues
- FAQs on the Texas PTA website

JoinPTA.org is a feature available free to all PTAs that have an active basic account with PT-Avenue and since every PTA must report new officers via their PT-Avenue account, your PTA should have a PT-Avenue account.

For a Local PTA to appear on [www.joinpta.org](http://www.joinpta.org) they must activate their PT-Avenue account, enter their Officer information, and input the required banking and dues information into the ACH tab of PT-Avenue. PTAs should complete this information carefully. If any of these information fields in the account are empty, the PTA will not appear in the list.

Not only does [joinpta.org](http://joinpta.org) make it easier for people to join your PTA, it also makes the job of Membership Chair easier.

- First, it allows members to join a local PTA/PTSA online, by credit or debit card.
- Second, it records members that joined through [joinpta.org](http://joinpta.org) automatically in the Local PTAs PT-Avenue account.
- Third, membership information and dues for the people that joined through [joinpta.org](http://joinpta.org) are automatically transmitted to Texas PTA. Members that join by any means other than [joinpta.org](http://joinpta.org) must still be reported to Texas PTA monthly by submitting the traditional Membership Roster or the PT-Avenue Roster report and dues.

## BACK THE FUTURE

And why worry about creating a new recruiting theme and all the bulletin boards and posters every year. Not everyone has the particular talents or enough time to devote to just the theme.

Texas PTA commissioned a well-known advertising company to help design a long-term Membership Recruiting Campaign for all PTAs to use. This long-term campaign represents our strong belief that an investment in the education of Texas children is an investment in our communities' future.

It has been used with GREAT success by PTAs and entire Councils and communities of all sizes all over Texas. It also serves as a branding campaign for PTA. If people see the same theme everywhere, they come to understand that all PTAs work together for the same thing.

And, the best part for YOU is that there are lots of resources in both English and Spanish on the Texas PTA website for you to use so you don't have to invent (or translate) everything from scratch every year! You can actually save materials and use them again and save some money!

You can, of course, personalize the Back the Future message to make hit home better on you campus. Texas PTA would appreciate seeing what you have done and hearing your success stories in recruiting. Contact us with your stories and, especially PICTURES so we can share them with other Membership Chairs all over the state.

### back the future

- Unites our PTA message
- Mission-focused
- Reaches across cultural boundaries
- Tools to strengthen outreach to the CommYOUity
- Recruiting resources available from Texas PTA

## NEW MEMBERSHIP TOOLS

In the 2018-2019 Member Card Box is a handful of literature to support your Membership recruitment, including:

- Join the PTA Fun: A PERSONALIZED brochure for Local PTAs for membership recruitment. Visit <https://www.txpta.org/membership> to order more.
- Quick Start Guide: Dive into another year with the fundamentals of membership recruitment and retention.



# Record, Report, and Remit

## Record

We've talked about different ways your members can join PTA. They can join "traditionally" using a membership envelope and a check, they can join using [jointpta.org](http://jointpta.org), or some PTAs have their own online membership site.

Since members can join in a variety of ways you will have to make sure you monitor all of the sources and create a master roster for your records.

- If they join using [jointpta.org](http://jointpta.org), the members names will automatically be added to your PT-Avenue account.
- If they join in the traditional manner, using an envelope or flier, keep those membership envelopes and forms until you have transferred all the information on them to your Master Membership Roster. After that is done, please dispose of the paper forms in a secure manner.
- If they join using your PTA's own online form, make sure you know how to use that site properly.

## The Membership Roster

This is a spreadsheet of all your reflects all your members to date. Ideally you want to be able to access this information by last name, class, membership type or other ways for easy reference to check who is a member. This is especially helpful when confirming eligibility to vote or access to member benefits. The entire roster can be kept on your PT-Avenue account (very easy since members from [jointpta.org](http://jointpta.org) automatically show up there), on a spreadsheet on your computer (a preformatted excel spreadsheet that you can download at [www.txpta.org](http://www.txpta.org)), or on a paper Membership roster, a sample copy is included in the information packet with your membership cards and is available in both Spanish and English. Be sure to share copies of the roster with your Treasurer and Secretary. **REMEMBER** - this roster belongs to the PTA and should not be shared with anyone.

PLEASE RETAIN A COPY OF THIS REPORT FOR YOUR RECORDS.

**PTA MEMBERSHIP ROSTER and DUES REPORT**

Mail with payment to: Texas PTA  
408 W. 11th St.  
Austin, TX 78701

Date \_\_\_\_\_ PTA ID # \_\_\_\_\_  
PTA Name \_\_\_\_\_ Person Submitting Report \_\_\_\_\_  
School District \_\_\_\_\_ Email Address \_\_\_\_\_  
PTA President \_\_\_\_\_ Telephone Number \_\_\_\_\_

**NUMBER OF MEMBERS AND DUES PAYMENT**

#	Regular Members @ \$4.50 each	\$
#	Texas Life Members @ \$2.25 each	\$
#	<b>TOTAL</b>	\$

Enter member TYPE for every member! R = Regular Member / Parent, F = Faculty, S = Student, C = Community. Check "LIF" column if a Life Membership.  
PTAs should only enter members below who have NOT been previously reported to Texas PTA during the current membership year.

Last Name	First Name	Member Type	LIF	Email address, physical address or phone
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				

OFFICE USE ONLY: Batch \_\_\_\_\_ Check/Money Order # \_\_\_\_\_ Amount Paid \_\_\_\_\_

All membership rosters should note the type of member for each person: regular, faculty, student, community and life member. (List only those Texas PTA Honorary Life Members who have selected your PTA to be exempt from paying state dues this year)

Prepare at least four copies of each membership list:

- One copy to be forwarded to the Texas PTA Office
- One copy for the treasurer's files
- One copy for the secretary to keep with the minutes to verify membership when requested
- One copy to be kept in the membership committee file



The basic version of PT-Avenue is provided to every Local PTA by Texas PTA at no charge. Activation of the Basic/Membership PT-Avenue account is required, as it is how your officers are reported to Texas PTA.

PT-Avenue is a cloud-based system designed to help PTA leaders manage membership information for their Local Unit. While there are additional functions your PTA can pay for, the basic/membership/free version has many functions to make managing Local Units easier and includes:

- Membership – offers PTAs a place to keep the lists of members, alphabetically by last name.
- Reports – various membership reports for the executive board;
- Offers JoinPTA.org feature, an option that allows people to join your PTA online (must be activated by completing the ACH tab\*);
- Staff List – your Teachers and Grade levels, for connection to Students;
- Email Membership – Mass emailing of members;

If JoinPTA.org is activated, members that join from jointpta.org will automatically be added to your PTA's roster. However, if you choose to keep track of all your members in PT-Avenue, those members entered manually (those that do not join through JoinPTA.org) must still be reported to Texas PTA and their dues must be remitted monthly.

#### Additional Features

- PT Avenue can be translated to multiple languages using the Google Translate button.
- Each area of PT-Avenue includes helpful instructions and the HELP button contains a list of available resources.
- Each PTA leader can create unique logins credentials to work in the account.
- Local units have the option to upgrade to either the “Membership & Finances” or “Full” version, at their cost.
- See the Membership Guide, in PT-Avenue, for full details.

## Report and Remit

The busiest time to recruit members is usually at the beginning of the school year, but membership recruiting and reporting should be year-round.

There are NO deadlines to submit membership rosters and dues to Texas PTA.

There are deadlines for Membership Awards. The Awards, their requirements and the deadlines change yearly. Learn more about these Awards on the Texas PTA website.

Report quickly and report often. Members names and dues should ideally be reported to Texas PTA within five business days of joining, but you should report at least monthly.

- Forward the member roster and dues report form to the Texas PTA Office with a check for \$4.50 dues per regular member and \$2.25 dues per Texas Honorary Life Member.
- Report Life Members by entering an “L” as the member type on the roster. They are exempt from paying the state portion of the dues only.
- Report only the names of new members for which you are submitting dues at that time. Members who have already been reported to Texas PTA should not be included on subsequent reports and rosters.
- Retain the Texas and National portions of dues in escrow until distribution to Texas PTA. The Local PTA treasurer reports the National and Texas PTA portions of dues separate from the funds belonging to the Local PTA.
- Please work closely and carefully with your Treasurer to submit membership rosters and dues in a timely manner. Following National PTA's policy, Texas PTA will not reimburse overpayments more than 90 days after submission.



## Policy on Refunding Dues

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The process of remitting membership dues to Texas PTA is one that impacts the Local, State and National PTAs. With varying timelines and platforms in place for collecting and distributing dues to the appropriate PTA, Texas PTA will adhere to the refund policy below.

### **State and National Dues Received Via Mail at Texas PTA**

Texas PTA will refund Local PTAs for excess or duplicate payments of State and National dues within the same membership year only if both of the following criteria are met:

- Written refund request is received at [memberservices@txpta.org](mailto:memberservices@txpta.org) within 90 days of the original date of Texas PTA's receipt of overpayment; and
- Written refund request is received at least 15 days before the end of the National PTA membership year.

### **Local, State and National Dues Received Via JoinPTA.org**

Texas PTA will refund dues received via JoinPTA.org only if both of the following criteria are met:

- Written refund request is received at [ptasupport@joinpta.org](mailto:ptasupport@joinpta.org) within 48 hours of the original transaction or the first day of the month immediately following the referenced transaction, whichever is earlier; and
- Written refund request is received at least 15 days before the end of the National PTA membership year.

All eligible refunds will be made directly to the individual whose credit or debit card was used in the referenced JoinPTA.org transaction.

### **Processing Fees Received Via JoinPTA.org**

Texas PTA will not refund Processing Fees on duplicate transactions or transactions made in error by the member.



# Keeping and Engaging Members

Once you have recruited members, it is important to find ways to make them feel like they are an important part of a vibrant association. Engaging members not only makes them feel valued, they are more likely to renew their membership when given the opportunity.

Engaged members value their membership in your PTA. Their dues will seem like a bargain. They are likely to join again next year and invite others to join.

Membership Chairs work closely with Programs Chairs to share information about what members want and expect from their PTA. Work with Hospitality Chair to make sure that your PTA is welcoming and friendly to EVERYONE. Work with the Communications Chair to share PTA information and ask people to join.

## WELCOME NEW MEMBERS

Make a good first impression of your PTA with new members as their experience will shape how they perceive PTA. Consider these questions:

- Have new members been introduced to the PTA leaders?
- Do new members receive information about PTA member benefits and services?
- Do new members know the PTA's goals and objectives for the year?
- Have new members been informed about upcoming projects and programs?
- Does the PTA know the special talents and interests of its new members? Is the PTA willing to utilize them?
- Are new members welcomed enthusiastically and made to feel part of the group, not only at meetings but also in daily activities?

Here are ways to make sure new members feel welcome:

- Send a letter to new members thanking them for joining and welcoming them to PTA.
- Make sure members receive a membership card as a receipt and tangible sign that they have joined a nationwide association that stretches far beyond their Local PTA.
- Provide a new member packet with PTA and school information, volunteer opportunities, executive board member names, and a calendar of events.
- Recognize new members by name at PTA meetings, in newsletters, on bulletin boards, etc.

Key ways to keep members:

- Communicate - Keep in touch with members all year long. Be sure that members know what the PTA is doing and what events are happening. If members feel connected they will be more likely to rejoin your PTA.
  - Make personal contact as much as possible whether by phone or catching up at school
  - Send regular emails and/or newsletters to members
  - Send important school or community information to non-members as well as members (helps with recruiting as well as retention)
  - Make contact to offer volunteer opportunities - recruit help!
- Involve - Offer members opportunities to be involved and participate in PTA. They want to make a difference for our children. Engage members by creating volunteer opportunities and providing programs that will be of value.
  - Offer regular volunteer opportunities that vary in time commitment and skill level. Describe the jobs very specifically, including the amount of time required, so that volunteers know just what is expected of them

- When possible, create volunteer opportunities by breaking bigger jobs down into several smaller pieces. This will engage more members as well as prevent burnout of others.
- Ready! Set! Achieve! Programs are free and available through Texas PTA and give your parents/grandparents the tools they need to raise children
- Bring in community programs that will support PTA families
- Create Importance - Make PTA important to members by being sure that the PTA name is on every event, flyer, and program that is sponsored by PTA. Make PTA visible! Members will return if they find value in the organization.
  - Have a large banner made for your PTA that can be displayed at every event which is sponsored by your PTA
  - Be sure all printed material has the name of your PTA clearly visible
  - Design spiritwear that includes the name of your PTA
  - Make sure your members know about your goals and accomplishments
  - Be sure to point out member benefits from voting rights to discounts
- Recognize - Show members how important they are to the PTA family through recognition and reward. Show your appreciation for their support and contributions. If members feel that they are an important part of the organization they will be want to return because they feel needed. More information about some types of PTA recognition are included later in this section.

## **IDEAS FOR HOW TO ENGAGE YOUR MEMBERS**

Never underestimate the value of a sincere “Thank you for joining PTA. Your membership makes a difference.” Attach a thank you note to their membership card. Perhaps have students make the thank you cards.

- Celebrate ALL your members throughout the year! Hand written thank you notes from your PTA team/ executive board members after a big event (or even a small one) is always a big hit!
- Host several ‘meet & greet’ opportunities for your membership to get to know each other at the beginning of each school year and each January. Provide a fun ice breaker/scavenger hunt along with light refreshments and a simple ‘thank you’ message from your PTA.
- Host a ‘volunteer orientation or volunteer kickoff’ in the fall and spring times for new and returning families.
- Share advocacy reports and updates from Texas PTA via website and social media outlets.
- Connect with the grandparents in your community as they join your campus for National Grandparents Day each September.
- Spotlight the National Walk to School or National Bike to School event held each October and April as part of your campus healthy lifestyles campaign.
- Host either a family board game or reading night in the fall and spring time as fun ways for families to connect within your communities. Choose something that many ages and backgrounds can enjoy.
- Provide a FAQ section on either your PTA website or at your events such as --” I am not able to volunteer, why should I join? Your \$XX membership dues helps to support various programs, presentations and help show your child/student that you are involved in their education.” And show pictures!!
- Partner with a nearby school in your feeder pattern for joint presentations and events that will bring both communities together. Get to see some familiar faces along with new ones too!
- Evaluate your membership by seeking feedback through surveys, social media or PTA website.
- Offer a door prize to members (not just attendees) at your PTA meetings -- must sign in and be present to win!

- Indicate on printed sign-in check lists how many years a person has been a member
- Remember to thank members for the volunteer work they do.
- Host a Volunteer appreciation event at the end of the year. Give certificates and public thanks for work.
- Be welcoming to everyone when they come to all PTA events. Everyone likes to be welcomed with a smile and a friendly greeting. Being a greeter is a fabulous job for a new volunteer with limited time.
- Reserve the best seats at PTA meetings and programs for “Members Only”.
- Publicize tangible member benefits from National and Texas PTA (discounts, participation in Reflections, eligibility for scholarships, etc)

### **WHY DIDN'T THEY RENEW?**

Unless you ask, you'll never know. Before you write off those who haven't renewed their membership, try to discover why. A personal visit or phone call is preferable, but a letter or email can sometimes work. Be sure to mention the accomplishments of your PTA and the benefits the member gains through their membership.

### **CELEBRATE YOUR SUCCESS**

One of the responsibilities of Membership Chairs that is often overlooked is celebrating success, but it is critically important to engaging with members.

Success begets success. When you are successful, shout it from the rooftops! People want to be part of a successful group. Celebrating your success accomplishes two goals - both appreciating members and aiding recruitment. Sharing accomplishments also reminds members that their PTA is part of a larger association that does care about them.

- Share your success with your membership.
  - Have you reached a goal or new milestone?
  - Have you earned an award for staff, men, students, grandparents, community members joining? When your PTA receives an award, tell EVERYONE!
  - Don't forget to share the great things your PTA is doing with member dollars. Let them know that their efforts and dollars are directly supporting their child.
- Share your success with Texas PTA.
  - Texas PTA and your colleagues across the state want to know what's working in your community. The Texas PTA Membership Committee is collecting and publishing success stories and wants to hear from you! What's worked in your community? Would you like some fresh ideas? Visit [txpta.org](http://txpta.org) and look for ways to share your membership success stories and read others' stories.
- Apply for Texas PTA Membership Awards
  - Reaching membership milestones
  - Increasing membership
  - Successfully engaging specific member groups
  - Achieving special membership challenges
  - Watch the Texas PTA website each August for criteria!

While most Membership awards are automatic, don't forget to apply for those that do need an application to be completed (MARS, Student Membership, Student Participation, Golden Apple, A Voice for Every Child, etc.

## HONOR OUTSTANDING MEMBERS

Outstanding volunteers whose work benefits students and the PTA should be recognized in special ways. There are many ways to do this ranging from the very simple to very special.

### Local PTA Recognitions

- Feature members' accomplishments in your PTA communications. Write an article or post a story about members. It is an honor for that particular member and could encourage their friends to join.
- Create your own award to recognize outstanding accomplishments - The Giving Tree, Golden Eagle, Our PTA's Superstar. The criteria for presenting these awards should be in your PTA's Standing Rules.
- Recognize 2-year members, 5-year members, 10-year members, etc. To do this, you will have to make sure rosters are kept safely. A few ideas:
- 2-year members might be something as simple as a "Welcome Back" card when you give them their membership card.
- 5-year members get "Welcome Back" card and recognition in the newsletter/PTA website
- 10-year members get all of above and a lapel pin
- 15-year members could get a special parking space or name badge
- Be creative and know what motivates your members!

### Council PTA Recognitions

Many Council PTAs have created their own awards and criteria for presenting them - The Oak Tree Award, A Pebble in the Pond, A Guiding Star. Check with your PTA Council Membership Chair to see if they offer any special recognitions to PTA members or even community members who have made a special difference in the lives of children in your community.

### Texas and National PTA Recognitions

Special recognitions are also available from Texas PTA and National PTA. Information about how to order these awards is available on the National PTA and Texas PTA website.

While all of these awards may be presented at any time, the ideal time for presenting the following awards is in February when we celebrate the formation of PTA on Founder's Day, February 17, 1897.

With input and approval of your executive board, form a committee at least 2 months before the planned Awards Ceremony to discuss and review possible recipients for these prestigious awards. More information about how to apply for these awards can be found on the Texas PTA website.

### TEXAS PTA HONORARY LIFE MEMBERSHIP

Since 1909, the Texas PTA has made available the Texas PTA Honorary Life Membership as one of the highest honors presented to individuals for outstanding service to children and youth. The recipient does not have to be a PTA member nor must the service for which the honor has been bestowed be connected with the PTA. The only requirement for receiving a Texas PTA Honorary Life Membership is that the recipient is making or has made a worthwhile contribution to the well-being of children and youth.

**NOTE:** Recipients of the Texas PTA Honorary Life Membership are exempt from paying the Texas PTA portion of dues for only one Local PTA of their choice per membership year . If they have received more than one Honorary Life Membership, they may register as a Texas PTA Life Member with as many Local PTAs as they have Honorary Texas PTA Life Memberships.

Texas PTA Honorary Life Memberships do not carry with them automatic rights to vote or to hold office in any PTA. In order to participate actively in PTA, an honorary life member must enroll in a Local PTA by paying the local and National PTA dues and having his/her name included on the membership list sent to the Texas PTA Office.

### **TEXAS PTA EXTENDED SERVICE AWARD**

In 1987, the Texas PTA board of Directors developed the criteria for awarding a Texas PTA Extended Service Award to those people who have continued to give outstanding service to Texas PTA. This award may be presented at any time. The recipient must have been actively involved in the Texas PTA for 10 years and be a Texas PTA Honorary Life Member.

### **NATIONAL PTA LIFE ACHIEVEMENT AWARD**

This award is the highest honor from the nation's largest child advocacy association to the person who daily lives out his or her commitment to children. The fee for presenting the Life Achievement Award supports the National PTA Endowment Fund and helps ensure the longevity of the association. Your honoree need not be a PTA member to receive the award. More information about this extremely prestigious award can be found on the National PTA website.

National PTA Achievement Award recipients enrolling in a PTA are not exempt from payment of any portion of PTA dues - National, Texas, or Local PTA. If they are both a National and Texas PTA life member, they should enroll as a Texas PTA life member.

Your Council PTA may also offer a celebration of these awards for all PTAs in their service area.

# PTA Support

## National PTA

The National PTA website is a great resource and we encourage you to get acquainted.

Some of the resources that National PTA provides are:

### Family Resources Dedicated to Helping Students Succeed

- Our Children Magazine
- Parents' Guides to Student Success
- Special Education Toolkit
- Anaphylaxis: Be Aware, Prepared and Ready to Respond
- STEM + Families

### Family Engagement

- National PTA School of Excellence

### Advocacy

- Advocacy Toolkit

### Support for Successful Local PTAs

- Local Leader Resource Bank
- Marketing Materials
- Back to School Kit

### Grants and Awards

- Mary Lou Anderson Reflections Arts Enhancement Grant
- Jan Harp Domene Diversity and Inclusion Award
- Take Your Family to School Week Grants
- Others- check the website

## Texas PTA

Here are some resources provided by Texas PTA and supported by member dues that benefit your PTA:

### Helping Families to Help Students Succeed with Free Parent Workshops

- Distracted driving
- Bullying
- Internet safety
- Successful parenting strategies

### Professional Development for Staff to Help Students Succeed

- True Colors (team building and communication)
- 40 Developmental Assets

### Improving Family Engagement in Education

- Reflections program
- Camp Just Imagine
- Kids First Program- bringing awareness of special needs
- Online newsletters on topics impacting education: arts, health, and advocacy
- Outstanding Educator Awards
- Scholarships for students and school faculty

Engaging members in advocating for legislation impacting education

Recent legislative successes include:

- Bullying and Cyber-bullying Legislation
- E-Cigarette Restrictions
- Sales Tax Holiday Expansion
- Cell Phone Prohibition for Driving Teens
- Lessening emphasis on standardized tests
- Increasing emphasis of community and student input on assessments

Supporting successful Local PTA operations

- Leader training
- Support for volunteers and staff
- Financial and Governance guidelines
- Automated 990 Interpretation of IRS regulations and requirements
- Non-profit 501(c)(3) status for Local PTAs with the IRS
- Member benefits and discounts (list)
- Member Services Department with staff ready to assist you.

## **Council PTA (ISD, County or Community if applicable)**

Your Council is THE source for local news, events, and training opportunities. The Council executive board will mirror the Local executive board closely and provide personal support in your community.

If you are not in a Council, or for additional support, contact Texas PTA for your local Field Service Representative contact information.

Acting as a primary channel of communication within the PTA network, a Council PTA provides information, inspiration, support, guidance and instruction to its member PTAs. It serves to strengthen Local PTAs, develop leadership potential, promote PTA membership, and advance Texas PTA's goals, programs and initiatives.

Council PTAs:

- Build strong relationships with PTA leaders and members, ISD representatives and community leaders.
- Assist Texas PTA in organizing new Local PTAs.
- Promote, encourage and recognize PTA membership growth.
- Provide leadership training and develop future PTA leaders.
- Assist Local PTA leaders with procedures.
- Role model effective organizational procedures and practices for Local PTA leaders.
- Give Local PTA leaders opportunities to discuss best practices and challenges.
- Promote Texas and National PTA programs and initiatives.
- Interpret and put into action the basic purposes and policies of Texas PTA and National PTA.
- Build Local PTA and public support for Texas and National PTA legislative action.
- Focus the attention of Local PTAs and the public on youth-related concerns and issues.
- Spearhead community projects encouraging collaboration and coordination of efforts in improving the education and welfare of all children and youth.

## **Local PTA**

Some of the resources provided by your local PTA and supported by member dues might include:

- Connection between home and school
- Improvement in education for all children
- Parent education programs
- Source of funds for needs of children
- Networking between people with similar interests and needs



# What is a Procedure Book?

A Procedure book is an annual record of the plans and activities of a given PTA position; a method to help you stay organized and focused; and is vital to the effectiveness of an on-going officer or chair.

## How to Compile a Procedure Book

- Ask yourself, “If I knew nothing about the job, could I do it with this procedure book?”
- Depending on your position, you may need hard copy materials at your fingertips (President, Secretary, Treasurer, Parliamentarian, Membership). If so, using a loose-leaf folder or binder with tabbed dividers is recommended.
- If your position does not require hard copy materials available at meetings, you can organize your procedure book with digital files and folders and store it on a USB drive.
- Note: Be sure to turn over the procedure book and all digital records to the new chair/officer at the completion of your term (see bylaws, executive board member duties).

## SUGGESTED TABLE OF CONTENTS

### BYLAWS/STANDING RULES

- A current date stamped copy of the PTA bylaws and Standing Rules (request a copy of these items on the Texas PTA website annually)

### ROSTERS:

- Dated Roster: contact information for your PTA Executive board including committee members and relevant staff
- Contact information of Council and Texas PTA officers or chairs with comparable responsibilities
- Resource people, related agencies and organizations in the community

### ITEMS RELATED TO YOUR POSITION (as applicable)

- Description and responsibilities of your job (found in the bylaws, Standing Rules, previous year’s Procedure Book)
- Current Texas PTA Resource Guide(s) relevant to your position
- Copy of your approved Plan of Work
- All Reports given by you or your committee at meetings
- Financial records related to your position including expense reports with copies of your receipts, a copy of Itemized Receipt Forms (counting sheets) that you signed.
- Copy of promotional material, newsletter articles, planning sheets, evaluations, etc
- Award forms submitted by you or your committee to Council, Texas or National PTA
- Annual report- summary of your accomplishments during the year including recommendations for the following term

### PTA MEETINGS

- Agendas and approved minutes from each meeting
- Financial Information
  - Approved/Amended Budget
  - Treasurer’s Report
  - Blank voucher forms for reimbursement of expenses
  - Tax exempt forms
- Handouts and updates received from Texas PTA, Council and Local PTAs
- Record of volunteer hours at home and school to be reported to the volunteer coordinator (if applicable)



# Resources

Texas PTA is committed to providing our volunteer leaders across the state with the knowledge and skills they need to be successful in their role within PTA. Access to quality educational resources is a key component in supporting this success, as well as continuing to build strong Local and Council PTAs.

## TRAINING

**FOUNDATIONS** courses provide a broad overview of “what” PTA is, and share important information that every PTA leader should know. All incoming executive board members are required, per the bylaws, to complete the *FOUNDATIONS: Leader Orientation* course prior to October 15th following their election or appointment.

*FOUNDATIONS: Leader Orientation* has two components that must be completed. There is \$10 course fee payable with the first component and this fee is reimbursable by your PTA.

*Welcome to PTA* is a high-level orientation to PTA that can only be taken online via the Texas PTA website at [txpta.org/training](http://txpta.org/training).

*Serving on a Local PTA Executive Board* is the nuts and bolts of leading your PTA. This portion of the course is taken in person and provided by Council PTAs and Field Service Representatives.

**BASICS** contain detailed information to support volunteer leaders in their specific executive board position. Every executive board member is strongly encouraged to attend a BASICS course for their own position, as well as any other related positions.

BASICS include a workshop and companion Resource Guide, along with other supporting resources. The workshops may be available via webinar, at Texas PTA events such as LAUNCH, or locally through your Council PTA or Field Service Representative training opportunities. PTA Leaders can access the Resource Guides via the Texas PTA website or online store.

**SPOTLIGHTS** offer a short, in-depth review of some of the specific yet important topics and recurring PTA functions such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections.

Training may be available via webinar, at Texas PTA events such as LAUNCH, or locally through your Council PTA or Field Service Representative training opportunities.

## NEWSLETTERS AND ALERTS

PTA Leaders can stay up-to-date by visiting the Texas PTA website to subscribe to content-specific e-newsletters or *The Voice*, Texas PTA’s e-magazine.

These timely and relevant communications allow PTA Leaders to stay current with important issues and programs, such as:

- Helpful hints to make PTA leadership effective and rewarding
- Sharing PTA successes in engaging members of their community
- Status of legislative priorities and public policy initiatives
- Programming updates on healthy lifestyles, arts in education, and Schools of Excellence
- Availability of Ready. Set. Achieve! parent education programs
- Recognition opportunities through honors, awards and scholarships







 Texas PTA

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THIS ITEM IS FOR PTA USE ONLY.