Membership - Step by Step

Procedure Book & Resources
Start one if you did not get one from your predecessor

Plan Membership Campaign
Chairman meets with PTA president and committee
Develop a membership marketing plan
- Include outreach to those under-represented
- Set goals and set 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

Create marketing message and select media for distribution
Share PTA programs and benefits, theme, goals, dues amount
- Who do you ask…everyone! Use email or social media as appropriate
- Membership envelopes are not required but are helpful

Keep PTA membership visible all year in newsletters, fliers, banners
- Have new student packets in the school office; a PTA table at all events
- Make personal outreach to last year's members who did not rejoin

Collect envelopes daily and deliver to treasurer or financial secretary
Use PTA financial procedures
- Two people count and record money (use Cash Verification Form)

Membership cards must be issued - every member deserves a card!
- Membership cards are provided at no cost
- Consider California State PTA's new e-membership card!
- Do not use "Mr. & Mrs. Hall" or "Hall Family" *(each member =one card)*
- Expiration date is always October 31

Membership lists should be maintained (include contact information)
Update list throughout year and keep for 3 years

Regular reporting and reconciling with treasurer at meetings
Make sure per capita is forwarded regularly
- If needed, request additional cards from your council or district
- Continue to publicize your PTA all year long and ask people to join

Keep Procedure Book updated
Write final year-end report (outline of activities, evaluation, recommendations)

Pass on all materials to successor
Procedure book and files…just as you would hope to receive them!
Accurate accounting of total members, funds collected & membership list