



7

Membership

Chapter Seven

Message to the Membership Chair

A strong, involved and informed membership is the most important asset of your PTA. Members make it possible for PTA to serve the children and youth of the nation on the local, state, and national levels.

As the membership chair, you are acting as a guide to those who are eager to learn about and become involved with your PTA.

The membership committee and its chair are responsible for promoting and increasing PTA membership and giving everyone in the community an opportunity to participate in this organization. It is up to you to educate all those around you about the purposes and objectives of PTA. In order for you to educate others, you must first learn and understand these purposes and objectives.

National PTA was founded in Washington, DC on February 17, 1897, by Alice McLennan Birney and Phoebe Apperson Hearst. We've come a long way since those first 2,000 dedicated volunteers dreamed and planned for the youth of tomorrow.

Today, the work of National PTA is carried on through its more than 6 million members, in 27,000 local PTA/PTSA units, located in 54 congresses, which include all 50 states, the District of Columbia, European, Pacific, and US Virgin Islands. **PTA is the largest non-profit volunteer organization in the world whose sole concern is the health, education, and welfare of all children and youth.**

Sometimes people can become so involved with their children in their school that they forget every child in every school is affected by the same rules and regulations that are handed down through state and national legislation and by the state and national departments of education.

As a part of a state and national association dedicated to the welfare of all children and youth, PTA members have a voice in the policy-making that affects their children, schools, and communities as well as all children and all schools in this country.

When membership committee members encourage others to join PTA, they should concentrate on creating interest and enthusiasm, and promoting involvement. Explain why it is so important to be a

part of this national association. Include information about the Mission and Purposes of PTA, the potential personal rewards, and the great benefits the children and youth of your school and community receive from your local PTA/PTSA unit.

A successful membership campaign seeks the involvement of all the members of the community. Potential members include parents, children, educational personnel, senior citizens, business/professional people, and grandparents. People who are already dedicated to PTA; people who are peripherally involved with PTA; and people who are, as yet, unaware of the efforts PTA is making on behalf of the children and youth of their community, their state, and their nation.

For additional explanation of any of the material in this section, please contact the Oregon PTA Vice President for Membership.

PTA Unit Membership Obligations

- ◆ When referring to "PTA" in print, do not use period to separate the letters. "PTA" should be referred to in capital letters at all times.
- ◆ Membership drives are a **year-long process**, not a one-time activity.
- ◆ Since each local PTA/PTSA unit ("local unit") functions individually, members must join and pay membership dues to each individual local PTA/PTSA unit in which they wish to have voting rights.
- ◆ Bylaws require a minimum of 25 members per PTA unit by November 1st.
 - Local units with no dues recorded in the Oregon PTA office by December 31st are in arrears. Mailings and services to these units will be discontinued until dues are remitted.
 - Local units with no dues paid by March 20th are considered "Inactive."
 - Inactive units may be reinstated within two (2) years by remittance of membership dues and an officers' list to the Oregon PTA office.
 - Units that remain inactive for longer than two (2) years will be dissolved.
- ◆ Local units must maintain Unit in Good Standing status for membership benefits (officers' list, membership dues, insurance payment, standing rules, and year-end financial report). Please refer to the **Leadership** section of this **Officers' Manual**.

Membership At-A-Glance

This suggested timeline should assist you in maintaining a great Membership campaign all year long! Put a copy in your procedure book for reference and update as needed.

MONTHLY

- ▶ Report new memberships online at www.oregonpta.org. (See Forms and Instructions Section of the Officers' Manual.)
- ▶ Turn membership fees and remittance form over to your PTA treasurer.
- ▶ Give an updated copy of the membership list to your PTA secretary.
- ▶ Balance your records with the treasurer and remind him/her to send fees and remittance forms to Oregon PTA by the 15th day of each month.
- ▶ **Make certain every paid member receives a PTA membership card in a timely manner.**
- ▶ Present a report at every meeting.

July and August

- ▶ Review materials received from predecessor.
- ▶ Attend Oregon PTA Leadership Camp training to pick up local unit membership cards and materials.
- ▶ Form a committee and develop a plan of work.
 - Get plans approved by your executive committee/board prior to kick-off.
 - Include funds in budget for campaign.
 - Include your principal in the planning.
- ▶ Kick-off your membership campaign by targeting back-to-school mailing packets and events.
- ▶ Gather membership dues from board members and staff members.
- ▶ Study membership awards criteria in the Awards section of this *Officers' Manual*.

September and October

- ▶ Offer membership opportunities at every school, PTA, and community event.
- ▶ Advertise membership through PTA, school, and community newsletters, community reader boards, school web site, etc.
- ▶ Provide membership information for new families through the school office.
- ▶ Invite local business members to join.
- ▶ Gather membership dues from everyone.
- ▶ Need additional cards? Call the Oregon PTA office at 503-234-3928.

November, December, and January

- ▶ Plan a Founder's Day Celebration to take place in February.
- ▶ Offer membership opportunities at Parent-Teacher Conferences.
- ▶ Contact last year's members and board members to renew their membership.
- ▶ Encourage EVERY staff member to join.
- ▶ Contact your state representatives and ask them to join your PTA.
- ▶ Gather membership dues from everyone!
- ▶ Fill out membership awards applications.
- ▶ Evaluate your committee's goals and update your procedure book as needed.

February, March, and April

- ▶ Celebrate Founder's Day!
- ▶ Register for and attend OPTA Convention – receive your Membership Awards!
- ▶ Identify a membership chair for next year.
- ▶ Visit your district office and ask all school board members to join your PTA.
- ▶ Host a parent-involvement table at spring parent-teacher conference – be sure to ask everyone to join your PTA!
- ▶ Gather membership dues from everyone!
- ▶ Assist the volunteer coordinator with year-end recognition of parent involvement!
- ▶ Plan a celebration for teachers and staff members for Teacher Appreciation Week (first week of May).

May and June

- ▶ Go for those final details of your membership goals. You can do it!
- ▶ Prepare membership materials for parents of incoming students during registration times.
- ▶ Gather membership dues from everyone!
- ▶ Bring your procedure book up-to-date with an evaluation of this year's plan and suggestions for next year.
- ▶ Thank your committee members for their hard work!
- ▶ Organize your membership materials for next year.
- ▶ Participate in year-end planning for the new school year.
- ▶ Celebrate your successes!

Remember, PTA membership should be open all year long to everyone! Look around your school and community; does your PTA membership represent the diversity and culture your school represents? Reach out to everyone and have a GREAT year!

Membership Chair Duties

- The Membership chair should be knowledgeable and enthusiastic about PTA
- Secure records of membership and the procedure book from last year's chair.
- Organize your membership committee as soon as possible. Involve as many people as you can. Committee plans need to be approved by the executive committee/board of the local units prior to implementation.
- Your primary responsibility is to enroll as many members as possible; therefore, aim your "campaign" at the entire community. Enroll parents, teachers, principals, staff, etc. at your school; enroll grandparents, relatives, individuals from businesses, and students.
- Study the results of the previous years' membership committee's plans and set your goals (e.g., a percentage or flat number increase over last year's total members).
- Attend leadership camp to obtain membership cards and materials. (If you are unable to attend, your president may pick up the membership materials in your place. Be sure to get these materials as soon as possible.)
- Collect membership dues for each individual who wants to join your PTA. Since each local unit functions individually, members must join and pay membership dues to each local unit in which they wish to have voting rights.
- Make certain ALL membership information is filled out completely, including name, address, phone number, and email for every member. (Membership benefits include services to every PTA member!)
- Report membership online at www.oregonpta.org.
- Communicate regularly with your local unit executive committee/board.
- Turn membership fees and remittance forms over to the treasurer, who must remit dues by the 15th of each month.
- Make sure the secretary has a current membership list at all times.
- Issue a membership card for **each individual member who has paid dues**. There are no family memberships. "business memberships" must be issued to an individual. These are PTA regulations.
- Update your procedure book as needed.

Membership Procedure Book

A procedure book is a compilation of all the information and material necessary for the effective functioning of an office or committee. It should contain resource materials and a history of the activities of a particular office or committee. It encourages continuity of work and provides a firm foundation for future work.

The following information should serve as a good foundation for your procedure book. As with all training materials, use what works and feel free to make changes to meet your specific needs.

Materials to be included in a procedure book:

- Contact list/directory. This should include names, phone numbers, addresses, and emails for your PTA executive committee/board, committee chairs, and a contact sheet from Oregon PTA.
- Standing rules and a copy of the approved budget for your PTA.
- *National PTA's Membership Quick-Reference Guide and this Officers' Manual* – or at least the Membership and Leadership sections.
- Plan of work. This should include a list of committee members; your membership total from last year; your plan of action, goals, ideas, and budget for this year; and a way to monitor and/or evaluate your progress.
- Calendar or annual timeline of events and/or activities to promote PTA membership.
- Instructions for online remittance, including your unit's password.
- A current list of your PTA members; bring this list to all PTA meetings.
- Relevant National and Oregon PTA articles, publications, and information.

You may choose additional items to be included in your procedure book. Keep in mind that the procedure book is not "law." Each membership chair will have different priorities, ideas, and goals. Your procedure book is designed to make your job easier and help you in organizing membership ideas. It is also a history to be passed along to the next membership chair. You may want to create a separate annual binder in conjunction with your procedure book. The annual binder would include specific information regarding your membership campaign; copies of flyers and newsletter articles that were sent home; and other time-related materials such as meeting minutes, annual calendar of events. This would create an easy annual reference while maintaining the much-needed function of the procedure book.

Membership Awards

Oregon PTA offers a number of awards to local units, councils, and regions. These awards symbolize the reward that comes from knowing you have successfully reached out to others in an attempt to better meet the needs of children within your school and community.

- The award application form and complete list of the membership awards available are included in the **Awards** section of this **Officers' Manual**.
- Membership awards recognize an increase in membership totals, meeting membership goals, and/or deadlines, and outstanding membership efforts. Awards criteria identify specific areas for membership committees to work toward. Some of these awards need to be applied for and others do not.
- Membership awards are presented at the annual Oregon PTA Convention.

Membership awards are updated from time to time to offer new ways of meeting membership goals. Be sure to check them out every year!

Honorary Memberships

The following classes of honorary membership are available through the Oregon PTA Office. All honorary members will receive an electronic subscription to Oregon PTAs **onevoice** newsletter. Because honorary members are not attached to a specific local unit (no standing rules, no elected officers, and conduct no business) they do not have voting rights.

Oregon Unit

The Oregon Unit is the honorary statewide unit for individuals who wish to affiliate themselves with Oregon PTA but may not have an association with a local unit. Honorary memberships begin at \$25 per individual. This is an excellent idea for your business or community members. An application form is included in Chapter Two, Forms and Online Instructions.

Honorary Life Achievement Awards

This is an excellent way to recognize and honor an individual who has made a significant impact on your local unit and/or community. This award is available by application and \$25 fee. Recipients are invited to a special reception at the annual Oregon PTA Convention. Application forms are available by contacting the Oregon PTA Office.

How to Market Your PTA

- **Study all materials and records**
 - Items received from your predecessor
 - Oregon PTA **Officers' Manual**
 - National PTA Membership Kit
- **Form a membership committee**
 - Involve parents, staff, local business owners, and community members
 - Meet to discuss the following – assign tasks to committee members
- **Identify marketing tools**
 - Personal contacts
 - Newsletters, hand-outs, or flyers
 - Bulletin board notices
 - School web-site or reader boards
- **Set goals**
 - Evaluate past records
 - Review the membership goal from Oregon PTA
- **Plan**
 - Make joining PTA easy and rewarding
 - Create a plan to involved many people
 - Find a professional willing to work with other businesses; children and youth are a part of your community, not just your school
 - Emphasize membership privileges
 - Provide a visual effect that tracks the progress of your goal(s)
- **Contact and invite everyone**
 - Utilize your marketing tools
 - Send a letter to last year's members
 - Target specific groups of individuals who are prospective PTA members
 - Include contact information on **everything** you send out
- **Report membership**
 - Remit fees and forms to the Oregon PTA office by the 15th of each month
 - Report membership at PTA meetings
 - Highlight new members in a PTA newsletter
- **Evaluate**
 - Review goals and status monthly
 - Update campaign strategies
 - Acknowledge your accomplishments by applying for awards
 - If you are not meeting your goals, reevaluate and try something new
 - Make recommendations for next year
 - ◆ Keep a record of how and what you did to share with the next committee
 - ◆ Identify your successes as well as the things you would do differently
 - ◆ Share ideas with Oregon PTA's Vice President for Membership
 - Celebrate your successes!

What do PTA Members Get?

Membership in PTA makes you a member of your local unit, Oregon PTA, and National PTA.

No other organization devotes its resources and energies so completely to the advocacy of children and youth. Fully ninety percent of all dues are used to provide services to members through local units. Services are in the form of information, programs, training, and materials.

These serve to educate and motivate members, and encourage broad range participation in the interests of every child.

National PTA Provides

- Each local unit president with a subscription to the award winning National PTA magazine, **Our Children**.
- Each local unit president with a copy of the **PTA President's Quick Reference Guide** as well as Quick Reference Guides for other key leadership positions including treasurer, membership, and programs chairpersons.
- Local unit members with weekly e-newsletters: **What's Happening in Washington** and **PTA Parent** (individuals may sign up for these by visiting the National PTA website at www.pta.org).
- Staffing of the National PTA Office in Chicago, IL for member services.
- Staffing of the National PTA Office of Governmental Relations in Washington, DC.
- Testimony on all federal legislation concerning children and youth.
- Representation in Washington, DC for the 6 million members of the world's largest advocacy group dedicated to the health and well-being of every child.
- National media campaign materials.
- A National PTA convention for the purpose of training and professional development of its members and for conducting its annual business meeting.
- Materials and resources for the **Reflections** program (cultural arts program available only to PTA/PTSA schools).
- On-line members-only discounts and services through National PTA's award-winning web site: www.pta.org.

Oregon PTA Provides

- Each local unit president with the **Oregon PTA Officers' Manual** on CD. Hard copies are available through the Oregon PTA office at minimal cost.

- Each local unit president with a quarterly "Local Unit Mailing." Mailings include time-sensitive materials intended for distribution to other local unit officers, individual members, and/or the community.
- Each local unit officer with Leadership Training opportunities for a minimal fee.
- Each local unit with non-profit, tax-exempt status with the Internal Revenue Service.
- Each local unit with general liability and bonding insurance at low cost.
- Each local unit with access to the **Resource Library** with topics such as leadership training, parenting skills, and children's issues.
- Each local unit **Reflections** chair with training and ideas for a successful program.
- PTA/PTSA school students with the materials to participate in the **Reflections** program through local, council, state, and national PTA levels.
- Each local unit with **Project H.E.L.P.** (Hundreds of Exciting Local PTA/PTSA Projects) to help local units with project ideas and implementation.
- Individual members with the opportunity to participate in a bi-annual "Legislative Summit" and/or "Day at the Capitol" in Salem, for a minimal fee.
- Individual members with an electronic copy of the monthly e-newsletter: **onevoice**. Email addresses are required for this benefit.
- A web site with current information available to all local unit members.
- An Oregon PTA convention for the purpose of the training and professional development of members and for conducting its annual business meeting.
- An Oregon PTA Board of Directors to coordinate statewide efforts and programs on behalf of its members.
- Staffing of the Oregon PTA office in Portland for members services.
- Representation and participation in meetings of statewide agencies and committees.
- Testimony on state legislation concerning children and youth.
- Tracking of Oregon legislation on child advocacy issues of concern to PTA.
- Oregon students with the ability to apply for **Teacher Education Scholarships (TES)** funded by individual and local unit donations.

Ideas to Increase Membership

In your building

- Sponsor an “Open House” *before* school opens in the fall to visit classrooms, meet teachers, and join PTA.
- Host a “New Parents” coffee social for parents of kindergarteners and first graders; offer ideas and suggestions for first-day-trauma and invite them to join your PTA.
- Host an orientation and facility tour for the parents of entry level grades of middle and high schools. Be sure to point out student services and parent-involvement programs.
- Use the energy and enthusiasm of students to recruit other students to membership; if involved and given responsibilities, they will become strong supporters and salespeople.
- Distribute a letter of welcome, along with PTA materials and an invitation to join, through the school office in new student registration packets.
- Host a membership orientation at the beginning of the school year; highlight what members get for their membership dues and how they can get involved.
- Encourage members to show their membership card at PTA meetings and events for a door prize.
- Set up a resource center in your building with copies of ***Our Children, onevoice***, and your local unit’s newsletters. Let members know how they can subscribe to these publications. Also include PTA brochures (available through the Oregon PTA Office) and membership information.
- Display PTA materials and information on a bulletin board or display area in your building and/or district office.
- Challenge each of your members to recruit *one* new member during a certain time period; put the names of the recruiter and the new member into a drawing for a donated prize.
- Invite past members and officers to renew their membership every year. Even if they no longer have children attending your school, they will very likely support PTA.
- Challenge classrooms to see who can return the most membership envelopes – not just those who join, so students whose parents don’t join won’t feel left out.

In your Community

- Visit senior citizens’ centers in your community; tell them about today’s PTA and welcome their membership; invite them to help you in your work, there are a variety of activities in which they could participate.

- Set up a PTA table at sporting events, music and theatre performances, family nights, or other community events. *Don’t just sit behind the table, have a couple of people in front to greet people and guide them to the table.* Be friendly and enthusiastic.
- Request exhibit space in library showcases, bank showcases, store windows, etc.
- Be prepared to answer questions about *why* people should join your PTA. Often, a simple answer will do.
- Encourage your local unit to give an Honorary Life Achievement Award to a deserving person in your community.
- If your community newspaper accepts free ads, create an ad for your PTA – use the personal and/or help wanted sections.
- Ask community organizations such as your local area *Chamber of Commerce* to distribute PTA information.
- Ask businesses with marquees to help you with your membership campaign. Invite them to become a local unit business sponsor. (Businesses may be interested in sponsoring memberships for low-income families.)
- Distribute a local unit newsletter and/or fact sheet to the whole community once a year. Tell your PTA story in terms of definite goals and achievements rather than in bland general statements. Study the history of PTA and highlight its accomplishments.
- Attend local service club meetings to speak about the services PTA provides and/or about the benefit their services would provide your community. Ask them to join your PTA or to become a business sponsor.

Thank members for joining

- Mail a personalized letter to all members thanking them for joining, inviting them to participate in PTA meetings (include dates and times), and encouraging them to get involved at the school and/or in the community (include a survey sheet to learn their areas of expertise). Include a self-addressed envelope.
- Tell members how important they are; whether they volunteer at school, home, or not at all. Every member helps the PTA mission through payment of membership dues.
- Provide a pen, note pad, or bumper sticker personalized with your local unit name.
- Give PTA/PTSA members special privileges: discounts on for-sale items, complimentary admission to a PTA/PTSA event, door-prize drawings, etc.

Frequently Asked Questions

How many membership cards does our unit receive?

Your local unit will receive a supply of cards based on your membership totals from last year. New units will receive a supply of cards determined by the Oregon PTA Membership Committee at the New Unit Presentation. **All unsold membership cards must be returned to the Oregon PTA Office.**

Can we get more cards?

Absolutely. Contact the Oregon PTA office by phone or email. Be sure to include your local unit's name, membership chair, the number of cards needed, and contact information.

What validates a PTA membership card?

The signature of the PTA member.

What is the purpose of a membership card?

Only members of a local unit may vote on the issues brought before it. This means a current membership card must be issued to **each** member of your local unit; **do not** issue cards in more than one name, such as "Mr. and Mrs....." or "The Smith Family." Remember, one card, one member, one vote.

Is a membership card issued by another PTA/PTSA unit valid for my unit?

No. Local units operate independently under the association of Oregon PTA. Specifically, each local unit has its own standing rules, elected officers, and budget. For these reasons, individuals must join **each** PTA /PTSA unit for which they wish to have voting rights.

Do PTA members have to join every year?

Yes. Membership dues are collected annually. In order to maintain your local unit's non-profit status, to be covered by Oregon PTA's liability insurance, and to benefit from the many other services provided through PTA affiliation; your local unit must maintain a minimum of 25 members per year. However, to maintain the effectiveness of local, state, and national advocacy efforts on your local units' behalf, we hope to see many, many more members!

How do I fill out the membership card when a business joins?

Ideally, businesses should be sponsors with perhaps the business owner or on-site manager joining as a member. Businesses themselves cannot be PTA members, only individuals may be PTA members.

How often do we need to send in membership dues?

Report all new members immediately at www.oregonpta.org. (Please refer to the Forms and Instructions section of the Officers' Manual.) Membership dues should be deposited by the local unit treasurer as soon as possible and remitted to the Oregon PTA office by the 15th of each month.

Can students join PTA/PTSA units?

Any student may join a local unit and will receive full voting rights. State and National dues are the same for all members. In some cases, the local unit standing rules may specify a student discount on the *local unit portion* of membership dues.

Who keeps a copy of the membership list?

The membership chair must keep a copy (the roster can be downloaded from Oregon PTA's web site at any time). Additionally, the local unit secretary must have a current copy to establish quorum at PTA meetings. The treasurer should have a copy for reconciliation purposes. The membership roster must **never** be distributed outside of the organization.

How long does a membership last?

The PTA membership year runs July 1st through June 30th. However, to allow local units the ability to conduct business over the summer and to start the new school year, membership cards do not expire until October 31st of each year. (E.g. a membership card issued on September 1, 2008 and one issued on May 20, 2009 will both expire on October 31, 2009.)

What is an Honorary Life Member?

This title was formerly used to refer to individuals who have received an **Honorary Life Achievement Award** from Oregon PTA (see the **Awards** section of this **Officers' Manual**). Award recipients are invited to attend a special reception at the annual Oregon PTA Convention. The award is solely honorary and does not carry the right to vote or hold office in any division of the organization.