

# MEMBERSHIP

2023-2024

# RESOURCE GUIDE





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Easy access to all of the live links in the Resource Guide are available at a scan of the QR code.



# 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.
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

## VALUES

- **Collaboration:** We will partner with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We are dedicated to children's educational success, health, and well-being through strong family and community engagement, while remaining accountable to the principles upon which our association was founded.
- **Diversity:** We acknowledge the potential of everyone, without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our association's goals.
- **Accountability:** All members, employees, volunteers, and partners have a shared responsibility to align their efforts toward achieving our association's strategic initiatives.

## PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- Standard 1: **Welcome All Families** The school treats families as valued partners in their child's education and facilitates a sense of belonging in the school community.
- Standard 2: **Communicate Effectively** The school supports staff to engage in proactive, timely, and two-way communication so that all families can easily understand and contribute to their child's educational experience.
- Standard 3: **Support Student Success** The school builds the capacity of families and educators to continuously collaborate to support students' academic, social, and emotional learning.
- Standard 4: **Speak Up for Every Child** The school affirms family and student expertise and advocacy so that all students are treated fairly and have access to relationships and opportunities that will support their success.
- Standard 5: **Share Power** The school partners with families in decisions that affect children and families and together—as a team—inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborate with Community** The school collaborates with community organizations and members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.



# Leadership Competencies

## Skills and Abilities Demonstrated by Effective Leaders

Successful leaders are effective leaders. Think of some of the most effective PTA leaders you have worked with. They fill their PTA role well, but their leadership capacity goes beyond that. They have skills and abilities that allow them to step into various roles. They see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to improve continually.

Texas PTA has identified a set of competencies that effective leaders demonstrate. Current and potential leaders can use these skills and abilities to improve their leadership. Local or Council PTA nominating committees can use them to recruit, nominate, and elect effective leaders. The competencies also drive our Full Circle Leadership Development program.

This list is by no means exhaustive. Rather, it is representative of the qualities PTA leaders demonstrate in the work they do to make every child's potential a reality.

Competencies	Descriptions
<b><i>Integral to All Categories</i></b>	
Communications	Listens actively and conveys information clearly, concisely, and accurately in both writing and speech
<b><i>Adaptive</i></b>	
Creativity	Sees and thinks of new ideas, alternatives, and ways to do things
Continuous Learning	Pursues the development of skills and knowledge
<b><i>Forward-Thinking</i></b>	
Critical Thinking	Obtains all relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions
Motivation	Demonstrates and promotes interest and enthusiasm
Vision	Demonstrates a clear understanding of the future and how to get there
<b><i>Interpersonal</i></b>	
Collaboration	Works as a team to achieve a common purpose, putting service before self
Initiative	Steps up unprompted and goes above and beyond with excellence
Relationship Building	Develops trust and mutual respect, and values diversity
<b><i>Intrapersonal</i></b>	
Empathy	Expresses verbal and nonverbal recognition of feelings, needs, and concern for others
Integrity	Does the right thing when no one is watching
Self-Awareness	Assesses their own strengths and weaknesses
<b><i>Technical</i></b>	
Delegation	Shares responsibilities, including guidance and follow up
Time & Resource Management	Effectively prioritizes and manages the resources to accomplish the goals of the group or project



# Texas PTA Diversity, Equity, and Inclusion Policy

This Policy has been developed by the Texas PTA Diversity, Equity, and Inclusion Task Force, adopted by the Texas PTA Board of Directors (“Board”), and is intended to be consistent with the National PTA’s Diversity, Equity, and Inclusion Policy. This policy is also designed to further the commitment of Texas PTA to diversity, equity, and inclusion: To continually be a voice for all children by reflecting diversity and inclusivity in our membership, leadership, program content, advocacy, training, partnerships, and communications.

We acknowledge the potential of everyone without regard, including but not limited to: age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.

**Effective Date:** This policy was amended as of May 23, 2023, shall be reviewed by the Board every two years, and shall remain in effect until amended or replaced in its entirety as a result of action by the Board.

**Scope:** This policy shall guide Texas PTA, its Board, all constituent divisions (Local PTAs and other divisions, including Council PTAs), and their respective members.

**Definitions:** For the purpose of this policy:

- *Diversity* is the representation of and respect for people from different backgrounds and identities—including but not limited to race, ethnicity, culture, religion, socioeconomic status, age, geographic area, sexual orientation, gender identification, language, approaches to learning, diagnoses, or exceptionalities impacting learning or access to learning, and physical appearance. It also involves bringing different ideas, perspectives, lived experiences, talents, values, and worldviews to represent the wide variety of children, caregivers, educators, and communities within the PTA family.
- *Equity* provides fairness and access to resources, opportunities, and outcomes so that all communities are provided with what they need to be engaged and successful. This moves beyond an “equal across the board” approach to include the following:
  - a) Recognize and address bias and privilege.
  - b) Understanding and attending to specific individual and community needs, providing additional resources to those with greater needs.
- *Inclusion* is actions, behaviors, and social norms that strive to ensure all people feel safe, welcomed, and accepted. This means putting diversity into action with skill and intentionality, striving to ensure everyone feels respected, supported, and valued—and can fully participate with an equal voice and a right to be heard. This includes actively seeking out voices that have been traditionally underrepresented and/or marginalized.

**Policy:** Texas PTA, its Board, and its constituent divisions (Local PTAs and other divisions, including Council PTAs) shall:

- Promote and encourage awareness, inclusion, and engagement of all diverse populations represented in the community.
- Openly assess beliefs and practices to ensure inclusiveness and equity and to guard against discrimination.
- Strive to ensure that the membership, leadership, programs, partnerships, and published materials reflect the diversity of their communities.
- Facilitate communication with families in their communities in languages they understand to the extent possible.
- Identify and address barriers that hinder inclusivity.
- Foster programs and practices that eliminate bias, prejudice, and misunderstanding.
- Advocate for funding, laws, and regulations that support programs, policies, and services that meet the health, safety, and educational needs of all student populations in Texas public schools.
- Provide resources and training that develop a more diverse and inclusive group of members, leaders, and community.

*Texas PTA first adopted a Cultural Diversity and Inclusion policy on July 26, 2012.*

# Standards of Continuing Affiliation



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Each membership year, Local PTAs must meet **both** of the following requirements to attain Active Status with Texas PTA. The membership year begins on August 1.

1. Remit to Texas PTA state and national membership dues for at least 20 members.
2. Submit to Texas PTA the name and contact information (mailing address, phone number, and email address) of at least one current executive board member, preferably the president.

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Local PTAs must comply with **all** of the following standards to remain in Good Standing with Texas PTA. Local PTAs that do not maintain Good Standing will be subject to a Local PTA Retention Plan as described below.

1. Maintain Active Status with Texas PTA.<sup>1</sup> (see requirements above)
2. Report all additional members and remit state/national dues to Texas PTA each year.
3. Submit to Texas PTA the name and contact information for all additional executive board members within 15 days of election or appointment.<sup>2</sup>
4. Review Local PTA bylaws (and standing rules, if applicable) every three years and submit to Texas PTA for approval.<sup>3</sup>
5. Each year, within 60 days of fiscal year-end, electronically file and have accepted by the IRS the appropriate "Form 990 Return of Organization Exempt from Income Tax".

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## **Local PTA Retention Plan (initiated when a Local PTA does not maintain Good Standing)**

**Notification:** Texas PTA will notify the PTA of the actions required to attain Good Standing. The PTA will have 30 days from the date of the notification to meet all Good Standing requirements to avoid moving into the Restriction Phase.\*

**Restriction:** While in the Restriction Phase, the PTA is not eligible for awards, programs, or grants administered by Texas PTA or National PTA. The PTA will have 30 days to meet all Good Standing requirements to avoid moving into the Restructure Phase.

**Restructure:** For PTAs that do not attain Good Standing following the Notification and Restriction Phases, Texas PTA may begin the process of restructuring the leadership of the PTA or revoking the PTA's charter. A PTA that signs an Action Plan may temporarily move into Intervention, giving them time to resolve any outstanding issues. The PTA will continue to be ineligible for awards, programs, and grants administered by Texas PTA and National PTA until Good Standing is achieved.

**Intervention:** Once in the Intervention Phase, Texas PTA will assign a support team to assist the PTA. If all Action Plan requirements are not resolved by the agreed-upon date, the PTA will be moved back into Restructure. *\*With cause, Texas PTA may place a Local PTA that has not met all Good Standing Requirements into the Intervention Phase early.*

1. *Active Status is used to determine eligibility in many Texas PTA programs and services. Please reference specific program eligibility requirements to ensure your PTAs participation.*
2. *PTAs submit executive board member information to Texas PTA electronically via the Texas PTA website.*
3. *Bylaws are submitted via the Bylaws Submission Form found on the Texas PTA website.*
4. *Proof of filing and acceptance is the Exempt Organization Business Master File issued regularly by the IRS.*

# The Importance of a Membership Chair

At its core, PTA is a membership association. When our membership is vibrant and robust, our influence at the school, district, state, and national levels is powerful.

That means your role is the most critical in PTA. As the top membership volunteer, your primary responsibility is to help people in your community understand that more members mean:

- more programs for students and families
- more influence on the success of children and families in your community
- more potential for volunteers

You have the privilege of sharing the value your PTA adds to the community, the value Texas PTA offers, and why everyone should join!

PTA is the largest and oldest nonprofit volunteer child advocacy association in the country. We engage and empower families and the community. We advocate for children in our neighborhoods and across the state. We do all we do with one shared vision, that *every child's potential is a reality!*

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. PTA focuses on multiple factors of a child's well-being, while many other organizations only select a few key focuses.

Before diving into your role as a membership chair, it's essential to know more about PTA!

# Getting Started

Whether you have more volunteers than you can manage or just a few dedicated folks, you can build a vibrant and robust membership in your PTA.

Growing membership is the most critical function of any PTA. Create quick and early momentum with these steps!

## Quick-Start Actions

- Don't start at zero! Email all executive board members, teachers, and staff to ask them to join. . Ask for a copy of the previous year's roster and email last year's members inviting them to renew their membership.
- Speak to the immediate past membership chair. What helpful information can they share to get you started?
- Take advantage of all the free resources provided by Texas PTA to make your job easier (scan the QR code for all the following links):
  - Customizable "[Everyone Can](#)" [Back the Future](#) campaign materials.
  - Free online joining platform at [JoinPTA.org](#)- make sure your PTA is listed.
  - Free membership database at [myPTEZ](#).
  - The [Local Roster](#) is used to track your PTA's progress and find your Field Service Representative (FSR) and/or Council support. Bookmark this page at the beginning of each school year!
  - The [Texas PTA Idea Share Group](#) on Facebook allows Texas PTA leaders to share their great ideas. Be sure to join if you haven't already.
- Download this year's membership awards at [txpta.org/local-and-council-pta-awards](#)
- Try to achieve the goal Texas PTA has set for your PTA. You can find it in the local roster. Challenge each executive board member to recruit five members or more. They can start with their spouse/significant other and their students!
- Ask the principal to routinely promote the value of PTA to faculty, and commit to earning the Golden Apple Award by November.
- Ask the principal to promote JoinPTA.org on the school marquee and other campus advertising opportunities.
- Ask each school board trustee to join your PTA. Send them a personalized letter with some of your PTA's past accomplishments. Brag on yourselves!
- New students enroll year-round. Provide your registrar with a PTA welcome letter and membership form to give to new families.
- Work with a committee to develop a plan to accomplish your membership goals.



## Membership Chair Duties at a Glance

- Register online with Texas PTA.
- Attend all meetings of your PTA.
- Understand and be ready to share the value that a thriving membership brings to your school and community.
- Develop a plan of work and submit it to the executive board for approval.
- Form a committee to help plan, recruit, and recognize members.
- Develop recruitment messages.
- Invite every family to join your PTA and earn the prestigious Platinum Voice for Every Child Award.
- Provide repeated opportunities for people to join: at every PTA event, in all PTA communications, and on all social media.
- Regularly submit (electronically or by mail) membership rosters and dues to Texas PTA.
- Distribute membership cards to all members and [request](#) additional cards as needed.
- Before each meeting, provide the secretary with the most current membership roster.
- Frequently update your school families, local community stakeholders, and businesses on progress towards your goal.
- Recognize outstanding contributions of leaders and members with Texas PTA Honorary Life Membership or Extended Service Awards.
- Celebrate your successes with membership, the school and district community, and social media following.
- Be familiar with the Dues Refund Policy.

# Keeping Records

Compiling and maintaining a complete record of your activities can help those PTA Leaders who follow behind you. Passing along important information to your successor gives them what they need to get started! New Leaders who access previously implemented PTA practices can more easily adjust and make needed changes. Additionally, a PTA should closely follow its records retention policy to be sure they are properly storing the records they need to maintain regulatory compliance.

## How to Compile Your Records

Ask yourself, “If I knew nothing about the job, could I do it with this information?” Depending on your position, you may need hard copy materials at your fingertips. If so, use a loose-leaf folder or binder with tabbed dividers. Other positions could easily keep their records electronically via cloud-based storage or a USB drive.

## Suggested Content

### *Bylaws/Standing Rules*

- A current, date-stamped copy of the PTA Bylaws and Standing Rules. Each year (after August 1), the parliamentarian should request a copy of your PTA's bylaws and standing rules from Texas PTA. They should be distributed to all executive board members and reviewed annually. Visit [www.txpta.org/bylaws](http://www.txpta.org/bylaws) for the request form and more information.

### *Rosters*

- Current roster of executive board members with their contact information
- Contact information for Texas PTA Field Service Representative, Council PTAs (if applicable), Texas PTA Board members with comparable responsibilities, the Texas PTA State Office
- Resources, and related agencies and organizations in the community relevant to your position

### *Items Related To Your Position (As Applicable)*

- Description and responsibilities of your position
- Current Texas PTA BASICS Resource Guide(s)
- Plan of Work approved by the executive board
- Reports prepared for meetings (executive board, membership, and committee)
- Financial records including approved budgets, detailed reports with copies of your PTA Funds Request Forms with receipts, and copies of all deposit forms that you have signed
- Promotional material, newsletter articles, evaluations, etc.
- Award applications submitted to Council, Texas, or National PTA
- Summary of your term, including recommendations for the following year

### *PTA Meetings*

- Agendas and approved minutes from each meeting
- Financial reports
- Relevant committee reports
- Information on upcoming events and programs sponsored by PTA at all levels
- Record of volunteer hours to be reported to the volunteer coordinator (if applicable)

# Membership Chair Effective Strategies

Our goal is to make your job easier. In the following sections, we will review effective strategies for membership chairs. Each section is broken down by the time you have available, so you can be successful no matter what. Include items from each level to propel your membership efforts tremendously!



**BASIC:**  
Not a lot of time?  
We've got you covered!



**INTERMEDIATE:**  
Got a little time?  
Let's take it to the next level!



**ADVANCED:**  
Just can't get enough?  
Let's do this!

**Research:** Understand why people join and what is important in your community. A simple Google form can help you collect responses.

**Goals:** Build momentum, improve upon previous successes, and ensure you don't miss any award opportunities!

**Planning:** Launch into a great year with the sample timeline and plan of work.

**Recruitment:** Create and share effective membership recruitment messages throughout the year.

**Engagement:** Engaged members are more likely to help recruit others and to join again next year.

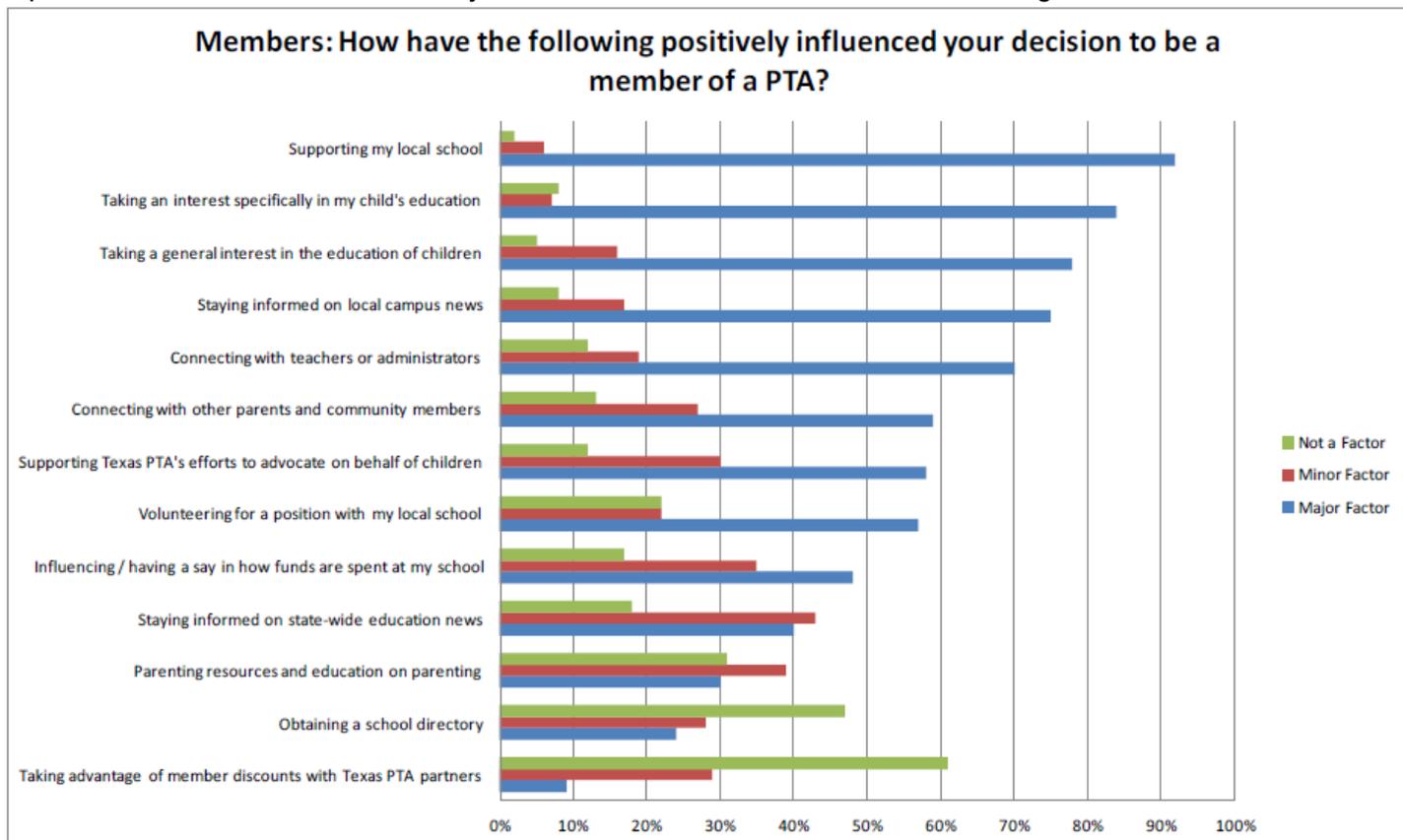
**Celebration:** You are your PTA's biggest cheerleader! No one will know how well your PTA is doing if you do not tell them. Be proud of every accomplishment, big or small!

## Critical Items

- **Never start from zero!** Reach out to members from the last membership year and ask them to renew their membership for this year. Even if they no longer have children at your school, they likely will continue to support its success.
  - 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.
- **Put together your team!**
  - Developing a good committee helps you make better plans, accomplish goals more easily, and build future leaders.
  - Enlist the help of the entire executive board. You are all PTA ambassadors and can assist in inclusive recruitment.

# Effective Strategies: Research

It is crucial to understand why people join PTA and what is most important in your specific community. To provide you with a headstart, Texas PTA commissioned McKinley Advisors to study the factors that were most important when members decided to join. The results are illustrated in the following chart:



More than 70 percent of respondents said supporting their school, supporting their children, supporting education in their community, staying informed, and connecting with teachers were major factors in their choice to join. Understanding this allows you to talk about the benefits of membership and plan incentives to join.

## Intermedate

Every community in Texas is a little different. Do a little research to find what will be most successful with your PTA and school.



- *What work has already been done?*
  - Review your predecessor's procedure book. What was successful or unsuccessful in the past? Ask them what they would've done differently and why?
  - Look at past membership rosters. Who and how many people have been members? Who was missing from the list - grandparents, men, business or community leaders, teachers, the principal, or superintendent?
- *Ask the Principal!*
  - What do they think would be successful in your community this year?
- *Know what is coming!*
  - Don't miss the Special Category Award deadlines!
  - Make sure your PTA is in Good Standing early. Texas PTAs Standards of Continuing Affiliation requirements could disqualify your PTA from earning awards.

## Advanced

The most successful PTAs are deeply in touch with their community. They tailor their goals, campaigns, and programs to ensure everyone feels welcome and belongs in PTA. Dig a little deeper to learn more about your community.



- Get to know your community.
  - Check the school or district website to learn more about the demographics at your school.
  - Get familiar with the diversity of your community and the challenges and barriers to joining PTA. It might be as simple as providing membership forms in a different language.
- Get your students involved! Students can be members too, and this is a great way to help them feel included in their school community.
- Ask your community!
  - Survey parents, teachers, and community leaders to see what they want from your PTA.
    - Work with the executive board to determine specific goals for the survey.
    - Choose questions that match your goal.
    - Only ask for information you plan on addressing (for example, membership, volunteering, and programs).
    - Keep your survey to a small number of short but informative questions. Short surveys are answered more often.
    - Explain the purpose of the survey and thank members for their feedback.
    - Keep all individual survey information confidential. You might even choose not to collect email addresses so you can receive honest feedback.
    - Have a plan to communicate the survey results and next step plans. Don't just obtain feedback and not use it. Work with your Executive Board and Membership Committee to implement any suggestions possible.
  - A sample survey with additional instructions and helpful tips is available at [txpta.org/membership](http://txpta.org/membership).
- Connect with other Local PTA Leaders, your Council Leaders (if applicable), and your Field Service Representative to learn what they've done that was successful.

# Effective Strategies: Setting Goals

Work with your committee to set recruitment goals based on your research. The goals will help keep everyone focused and on track for success.

## Basic

- Ask yourself the following questions to establish some quick goals and begin planning.
  - Do you want to earn a specific award? Identify the awards you want to earn and develop a plan to achieve them.
  - How will people join - JoinPTA.org, traditional forms and/or envelopes, checks, online platform, or a combination of these methods?
  - When and where will you ask people - via emails or social media, at meetings or events?
  - How will members receive their membership cards?
  - Is your PTA in Good Standing and eligible for all awards?



## Intermediate

- Do you want a specific number or percentage increase over last year?
- What other opportunities can you give people to join - Meet the Teacher and Back-to-School events, student folders, and new student registration?
- How will you recruit throughout the entire semester?



## Advanced

- How can other people assist you in growing your membership - each member joins their whole family, invites grandparents, or something else?
- Does your membership reflect your community - who is missing?
- If someone did not have a child at your school, how could they join - your mayor, school board trustees, and business or community leaders?
- How will you recruit next semester?



# Effective Strategies: Planning

## Sample Timeline

### June - July, or immediately after taking office

- Review Get Started and Responsibilities on the Membership page at [txpta.org/membership](http://txpta.org/membership).
- [Register for LAUNCH!](#)
  - Attend membership workshops.
  - Attend the Texas PTA annual meeting to celebrate membership awards!
  - Participate in the membership awards celebration at LAUNCH (not always at the annual meeting).
- Become familiar with the process to submit members defined online at [txpta.org/submitting-members](http://txpta.org/submitting-members).
- Prepare and gather materials for membership recruitment (last year's membership roster, recruitment flyers, membership cards, and current [awards flyer](#) from Texas PTA).

### August

- NOTE: The membership year begins on August 1.
- Be sure you have your login information for myptez.com if you plan to submit your memberships electronically. The login should be shared by the immediate past president, or have your president contact myptez.com to request a new login. You will need to provide a copy of the membership meeting minutes for your election to prove eligibility.
- Leave a flyer for the school office to distribute to new students who enroll throughout the year.
- Email past members to invite them to renew their membership.
- Schedule volunteers to host a membership table at every PTA event and speak to your principal about having a table at all school events. Begin membership recruitment campaigns.
- Ask the principal to distribute recruitment messages through school channels.
- Invite people to join everywhere possible - email, social media, newsletters, PTA and school websites, newspapers, billboards, and radio/TV.
- Share how to join - JoinPTA.org, membership envelopes, events.
- Publicize your PTA's membership goals.
- Energize your campaign by regularly sharing progress - use posters, photos, brag boards, PowerPoint presentations, videos, and artwork.
- Ask for faculty input about contests or other incentives to encourage membership.
- [Electronically submit](#) or mail membership rosters and dues for all new members at least monthly! *This month, be sure to check for any members who may have joined early at an event last spring for this year. Include them only if they have not been submitted already. See "What is the Membership Year" in the FAQ section.*

### September-December

- Work with the executive board to ensure your PTA is in Good Standing. Visit [txpta.org/standards-of-continuing-affiliation](http://txpta.org/standards-of-continuing-affiliation) to ensure your community does not miss out on any membership awards.
- Work on achieving the [Golden Apple award](#). This award is earned when your PTA achieves 100% of the faculty on campus joining the PTA. Be sure to check the membership awards for the due date.
- Encourage the executive board, committee members, and staff to promote membership. If everyone recruited one member, you could double in size! Children and spouses are a great place to start!
- Work with the school registrar to provide a PTA welcome kit to new student families to invite them to join.
- Continue to invite people to join all the time!
- Contact parents and teachers who have not renewed or joined personally and share the great things your PTA is doing for your children.
- Remind families of membership requirements for Reflections (if provided at your campus).
- Provide frequent community updates on progress towards goals and why a robust and thriving membership is important.
- Review eligibility for [Texas PTA membership awards](#) by checking the [Local Roster](#).
- Plan the spring membership campaign.

- Electronically submit or mail membership rosters and dues for all new members at least monthly. Don't forget about all those awards you can earn!
- Relax and enjoy the holidays!

### **January**

- Kick off the spring campaign.
- Continue to recruit new members.
- Check with the registrar to see if new welcome kits are needed.
- Engage those who are not members to learn why and how they might be convinced to join.
- Evaluate your progress and plan new approaches to reach goals.
- Recognize outstanding leaders, members, grade levels, or classes on social media or at meetings.
- Consider awarding outstanding members the Texas PTA Honorary Life Member Award, Texas PTA Extended Service Award, or the National PTA Life Achievement Award.
- Electronically submit or mail membership rosters and dues for all new members at least monthly. There are still awards to be earned!

### **February**

- Celebrate belonging to the largest membership association that advocates for all children on Founders' Day (February 17).
- Share Texas PTA advocacy successes with members and those who have not yet joined. Remind them of the importance of a robust and thriving PTA membership in your community and the state.
- Be on the lookout for the bonus award linked to Rally Day or Straight Talk Events.
- Update your procedure book for the next committee chair. Include membership records, recruitment activities, messages, and materials used during the year.
- Electronically submit or mail membership rosters and dues for all new members at least monthly. There are fun awards to be earned!

### **March**

- Submit Special Category Awards forms (deadline: March 31)
- Evaluate your progress toward your PTA's membership goals. Who is still missing? Everybody wants to belong!
- Mark your calendar for all spring events to ensure guests are asked to join. Membership is not about how many months someone belongs. It is about adding their voice to our mission to make every child's potential a reality. It is also about building your PTA into a thriving and essential part of the community.
- Don't take a break from celebrating successes!
- Add recommendations for next year to the procedure book.
- Electronically submit or mail membership rosters and dues for all new members at least monthly. There are still awards to be earned!

### **April - May**

- Continue work on membership goals. It is not too late to grow and earn awards!
- Celebrate your success with your community!
- Electronically submit or mail membership rosters and dues for all this year's new members. *If you recruit new members during a Round-up or Open House, follow the guidelines provided under "What is the membership year?" in the FAQ section.*
- Notify members that you are counting on them to continue to support your school by renewing their memberships on August 1.
- Meet with your successor and pass on the procedure book and other records at the end of the school year. Help your successor transition into the coming year.

Enjoy your summer break. Don't forget to join the PTA again next year!



# Sample Plan of Work

## Muestra Plan de Trabajo

<b>Executive Board Member Name:</b> (Nombre del Miembro de la Mesa Directiva)			
<b>Position:</b> (Posición)	Membership Chair	<b>Year:</b> (Año)	

*Reproduce as needed for the appropriate number of goals.*  
(Reproducir según sea necesario para el número apropiado de metas)

<b>Responsibilities / Duties:</b> (Responsabilidades/Obligaciones)	<p><b>Basic</b></p> <ul style="list-style-type: none"> <li>● Add PTA to JoinPTA.org, if not already added, and promote it widely.</li> <li>● Inform the community of the benefits of a vibrant, robust PTA in your community.</li> <li>● Monitor the myPTEZ account for new members.</li> <li>● Electronically submit, or mail dues with the membership roster to Texas PTA.</li> <li>● Maintain accurate records in a procedure book.</li> <li>● Work closely with the treasurer to maintain accurate records.</li> </ul> <p><b>Intermediate</b></p> <ul style="list-style-type: none"> <li>● Work with a committee to develop a recruitment strategy for the entire year.</li> <li>● Integrate the invitation to join into every PTA event and communication in your community.</li> <li>● Share PTA successes.</li> </ul> <p><b>Advanced</b></p> <ul style="list-style-type: none"> <li>● Learn about the diverse makeup of your community and develop a strategy to ensure everyone is represented in your membership.</li> <li>● Develop fun ways to thank your community for joining PTA.</li> </ul>	<b>Committee Members:</b> (Miembros del Comité)	
<b>Goal:</b> (Meta)	<p><b>Basic</b></p> <ul style="list-style-type: none"> <li>● Earn the Head Start Award.</li> <li>● Increase membership from the last school year.</li> <li>● Earn the President’s Challenge award.</li> <li>● Earn the Silver Voice for Every Child Award.</li> </ul> <p><b>Intermediate</b></p> <ul style="list-style-type: none"> <li>● Earn the Golden Apple Award.</li> <li>● Earn the Snappy Increase Award.</li> </ul>	<b>Evaluation Process:</b> (Proceso de Evaluación)	Feedback from community, executive board, and final membership results

	<ul style="list-style-type: none"> <li>• Earn the Gold Voice for Every Child Award.</li> </ul> <p><b>Advanced</b></p> <ul style="list-style-type: none"> <li>• Earn all Special Category awards.</li> <li>• Increase membership by 15%.</li> <li>• Earn all spring awards.</li> <li>• Earn the Platinum Voice for Every Child Award.</li> </ul>		
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Specific Action Steps (Pasos de Acción Específico)	Start Date (Fecha de Inicio)	Completion Date (Fecha de Terminación)	Budget (Presupuesto)
<b>ALL: Attend all executive board and regular meetings</b> and provide a report on membership.	July	Ongoing	\$0
<b>Basic: Promote membership and benefits</b> through email, newsletter articles, website, marquee, carpool, school events, local media, and social media.	July	Ongoing	\$25 to print brochures; \$24 for 2 boxes for TXPTA dues envelopes
<b>Intermediate: Recruit committee members and develop a membership recruiting strategy to include:</b> <ul style="list-style-type: none"> <li>• provide a welcome packet for new students</li> <li>• include a recruiting display at every PTA meeting or event</li> <li>• issue a membership challenge</li> <li>• partner with the community to promote membership to everyone interested in backing the future</li> <li>• use and decorate school hallways, if allowed</li> </ul>	July	Ongoing	\$0
<b>Advanced: Learn about the community:</b> speak with the principal and review school demographic data to understand the diversity of your community, as well as the challenges and barriers to joining PTA.	July	Ongoing	\$0
<b>ALL: Submit dues received</b> to Texas PTA at least monthly	August	Ongoing	\$25
<b>ALL: Distribute membership cards</b> in a timely manner.	August	Ongoing	

<b>Resources: (Recursos)</b>	<ul style="list-style-type: none"> <li>• Texas PTA FOUNDATIONS Basics Membership Resource Guide</li> <li>• <a href="http://www.txpta.org/membership">www.txpta.org/membership</a></li> <li>• National PTA <a href="http://www.pta.org">www.pta.org</a></li> <li>• Previous chair's notes</li> <li>• Current executive board and committee members</li> <li>• Past membership rosters</li> <li>• Community leaders</li> <li>• Council and/or Field Service Representative</li> </ul>
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# Effective Strategies: Recruitment

When asked why they didn't join PTA, many people say, "Nobody ever asked me!" Whether completely accurate or not, what we know is we must repeatedly ask before everyone hears and joins.

## Basic

Your membership should reflect your whole community, so remember to *ask everyone!* Not everyone will come into the school, see the Facebook post, or find the invitation in their child's backpack, so remember to *ask everywhere!* Information overload is real. People will likely need to see or hear your invitation multiple times before they act on it, so *ask often!*



When figuring out how to inspire folks to join, take your cues from the research conducted by Texas PTA. Look back at why people said they joined and what they value the most. The research can also help us all be ready to answer the question, *Why should I join?*

- Join to support your child!
- Join to support our school!
- Join to support our community!
  - According to the study, more than 90% of members join because they believe it is a great way to support their child, the school, and the community.
- Join so you can stay informed on what is going on at our school!
  - According to the research, 75% of parents believe that joining PTA helps them stay informed about what is going on at the school. Whether it is true or not, the perception is that PTA leaders and members are in the know about what is going on at their school.
- Join to get better connected to our teachers and administrators!
  - Roughly 70% of parents reported they joined PTA to connect with teachers and administrators. Whether it is true or not, the perception is that PTA leaders and members have a better connection to school staff.
- Join to meet other parents who value high-quality education!
  - Nearly 60% of members felt like joining PTA allowed them to connect with other parents in the community.

## Intermediate to Advanced

Personalized recruitment messages can make the greatest impression. 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. Be sure to share your reasons for joining.



### • Dos and Don'ts

#### Do:

Be conversational  
Make it personal - speak from the heart  
Listen carefully to the response  
Show your passion  
Be informative and factual  
Be respectful of opinions  
Be prepared for the next step  
Thank them whether they join or not  
Invite all to join!

#### Don't:

Sound rehearsed  
Be too general  
Be mechanical  
Forget to close with your "ask"

### Sample Recruitment Messages:

- I can tell you care about children and the future of our community. PTA is here to help every child grow up well-educated and healthy so that they can achieve their potential in life. Our PTA does many great things at our school, and we would love to add your name to our list of supporters. Your membership and support – your VOICE -- make us stronger. Your membership can make a difference for kids. Would you join our PTA?
- No, you don't have to have a child at our school or even in school. You just have to care about the future of our community.

- No, you don't have to come to volunteer at our school. We'd love to have your help if you have time, though.
- We're a fun group, and it's a great way to feel more connected to the people at school.
- The most important reason to join PTA is that every member is one more voice speaking on behalf of children. Your support is vital to back the future of all children. Would you please join our PTA?
- (For the student member) - Students are an essential part of PTA. Our PTA does many great things to assist the students at the school. We need to hear from students to make sure we are working on something that makes a difference. Being active in PTA benefits the school and other students, and it benefits YOU. You can learn leadership and life skills that will be used for the rest of your life.
- PTAs host many events and programs to help parents spend quality time with their children. Studies show students are more successful when their parents are involved in their child's education and school.
- Join our PTA so you can be part of making positive changes in our school.
- You can join your whole family. We want everyone to feel included and welcome!

# Effective Strategies: Engaging Members

Membership engagement is the process of actively building, nurturing, and managing relationships with your members to increase your PTA's membership numbers, volunteer numbers, programs, fundraising successes, and retentions or renewals.

Engaging members is a team effort. Identify the ideas you like the best and get the entire executive board involved. The team will also share the benefits of engaged members.

## Benefits of Engaged Members

- When a parent sees the value in their membership, they will encourage others to join and make your recruitment efforts easier.
- Show your community the value of being a member, and they will more enthusiastically volunteer.
- Increase program participation by helping members understand and connect with the value you provide to the community.
- Members who understand our vision, mission, and goals are more likely to participate in fundraising efforts.
- Heard the phrase, 'it takes less effort to keep an existing customer than to get a new one?' The same is true for PTA members. Once someone joins and understands the value of being a member, they are more likely to join again the following year.

## Engaging Members in Five Easy Steps

### 1. Welcome

Make a good first impression to shape how members perceive PTA positively. This will set the tone to improve support, engagement, and membership renewal in future years.

#### Basic

- By email or social media, welcome and thank members.
- Deliver membership cards.
- Encourage members to follow your PTA on Twitter, Facebook, Instagram, Snapchat, or anywhere else you have a presence.
- 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.



#### Intermediate

- Take time to welcome and thank new members on social media, at PTA meetings, in electronic newsletters, or on bulletin boards.
- Ask the executive board to introduce themselves and find creative ways to welcome members at events.



#### Advanced

- Create a fun Welcome packet (*printed or digital*) to distribute to all members. Include essential PTA and school information, volunteer opportunities, a calendar of events, and volunteer opportunities.
- Ask the executive board to call or email each new member personally. When welcoming, share when your next event or meeting is to invite them.
- Host several 'meet & greet' opportunities for your membership to get to know each other at the beginning of each school year and in January. Provide a fun icebreaker/scavenger hunt, light refreshments, and a simple 'thank you' message from your PTA.



### 2. Inform

Roughly 75% of members said they joined to understand better what was happening at their child's school. Keeping the PTA membership informed about meetings and events is important to feel valued. Also, keeping them informed about what is happening at the school adds even more value to their membership.

#### Basic

- Too often, PTA volunteers forget to inform the community what events and resources are hosted or provided by PTA. First and foremost, keep them informed about what PTA is doing for the community!



- Share a list of all things PTA has planned or done at each meeting.
- Use signs that say, “Brought to you by PTA” at events.
- Include a list of PTA-sponsored events and resources on a bulletin board, social media, or your membership invitation.
- Post on social media or email promptly during your events and meetings. No one likes a last-minute invite!
- Share advocacy reports and updates from Texas PTA via the website and social media.
- Use social media or email to inform parents of what is happening at school and in the district regularly. Consider featuring something special in each grade level.

#### Intermediate

- Consider a monthly PTA newsletter to keep members updated with everything PTA.
- Host a coffee with the Principal and/or Counselor. This is a great way to help parents feel connected to the campus and what is going on in their student’s school life.
- Publicize member benefits, such as voting rights to tangible member benefits from National and Texas PTA (discounts, participation in Reflections, eligibility for scholarships, and so on).



#### Advanced

- Ask Me Anything: Bring in an expert (school counselor, Superintendent, Trustees, city officials) and let members ask questions for an hour or so. Find a common interest among your members, then find an expert to help with those interests.
- Share membership myths on your PTA website and social media, such as “I cannot volunteer; why should I join?” Volunteering isn’t required. Your \$XX membership dues help support various programs and presentations and help show your child/student that you are involved in their education.” And show pictures!!
- Ask members to share about teachers or other staff members who have gone out of their way to help students, or ask teachers and staff members to share stories about members who have gone out of their way to help the community.



### 3. Connect

Nearly 75% of members said connecting with teachers, school staff, and other parents was a benefit of their PTA membership. Members who feel connected are more likely to invest time attending events, volunteering, and renewing their membership.

#### Basic

- Ask the principal, or another staff member, to share relevant news at every PTA meeting.
- Play “Who is Who” by posting staff baby pictures or fun facts and encouraging parents to guess who is who. Don’t forget to mention that those staff members are also PTA members!
- Feature members on social media to welcome and introduce their families to the community.



#### Intermediate

- Sponsor opportunities for members to connect with school staff outside the school, such as at school-spirit nights at local restaurants and block seating opportunities at sports events.
- Connect with the grandparents in your community as they join your school for National Grandparents Day each September.
- Host events that encourage members to learn about the different cultures of the community.



#### Advanced

- Survey members to find out what is important to them and their families and then find ways to celebrate that and connect families with similar interests.



- Host a family board game or reading night in the fall and spring as fun ways for families to connect within your community. Choose something that many ages and all backgrounds can enjoy.

#### 4. Encourage

Encourage members to participate by creating volunteer opportunities and providing programs that are of value. Members indicated the number one reason they joined their PTAs was to support their school. Allow them to make a difference by joining, participating, and volunteering. Once they get involved in smaller ways, they may be comfortable and interested in taking on a bigger role.

##### Basic

- Personally invite members to come to meetings. Consider sending a quick email as simple as, "Hey there, Mrs. \_\_\_\_\_, thanks for attending our last PTA meeting. We have one coming up \_\_\_\_\_, and we hope to see you there." The member won't automatically think, "Oh, they got my name from the sign-in sheet. They will think, "Oh wow, how nice is this!"
- On your membership form, ask about hobbies, interests, or special skills that may benefit PTA, and ask if they would like to join and volunteer.
- Schedule Connect programs. They are free and available through Texas PTA and encourage families with meaningful information on relevant parenting topics.



##### Intermediate

- Regularly share volunteer opportunities that vary in time commitment and skill level. Describe the jobs very specifically, including the required time, so that volunteers know what is expected of them.
- Spotlight the National Walk to School or National Bike to School event held each October and April as part of your school's healthy lifestyles campaign.



##### Advanced

- Partner with a nearby school in your feeder pattern for joint presentations and events to unite both communities. Get to see some familiar faces along with new ones too!
- Create a Referral Program. Members who a friend or colleague refers are highly likely to become as engaged as their peers and stick around longer. A referral program may be as simple as identifying your most active members and asking them who else they think should join. Add incentives if you like, or even have a competition.



#### 5. Celebrate

Make sure your members know they are valued! Everyone appreciates recognition, and those who feel appreciated will likely be more involved and renew their membership. Don't forget to celebrate PTA successes too!

##### Basic

- At membership meetings, share the names of new members and ask them to stand.
- Post names and photos on social media (with their permission).
- Provide incentives to members: front-row seats at performances, special no-wait entry for events, special spirit wear, early purchase opportunities, and so on.
- Consider providing membership incentives throughout the year. Ask local businesses if they will partner with you to offer your members discounts.



##### Intermediate

- Offer a door prize to members (not just attendees) at your PTA meetings -- must sign in and be present to win!
- Ask the executive board to seek out and thank members by name in the community or when they are at school.
- Consider featuring your members and their families on social media or a bulletin board (with their permission). You can use the Back the Future materials to make fun images to celebrate people who join!
- Indicate on printed sign-in checklists how many years a person has been a member.



## Advanced

- Say Happy Birthday. Consider asking for your members' birth month and day so you can send a special birthday message!
- Celebrate ALL your members throughout the year! Handwritten thank-you notes from your PTA team/ executive board members after a big event (or even a small one) is always a big hit!
- Surprise and Delight. Pick one member a day and make their day. Send a treat with a personal letter or thank you card.
- Host a volunteer appreciation event at the end of the year. Give certificates and public thanks for your volunteers' work.
- Attend a school board meeting and thank members of your PTA. Share with the trustees what those members have done and made possible at the school. Remember, these meetings are typically recorded and broadcast. Send notice to your members inviting them to watch!
- Create an award to recognize outstanding accomplishments. The criteria for presenting these awards should be in your PTA's Standing Rules.



# Effective Strategies: Student Engagement

Yes, students can be members too! As active and equal members of PTAs, students can provide valuable suggestions and opinions regarding youth-oriented programs. You do not need to be a PTSA to have students actively participating within your PTA. They will bring new energy and enthusiasm to your unit and its projects. In return, you will be developing the leaders of the future. They will also broaden your volunteer base.

Ask these questions regarding student engagement:

- Does your PTA feel student engagement is valuable?
- Do PTA meetings conflict with students' classes or other activities?
- Does your school's staff support student engagement?
- Does your PTA offer programs and activities that interest students and encourage participation?
- Does your PTA allow students to hold elected offices?
- Does your PTA's leadership development program address student engagement and participation?

## Benefits of Student Engagement

- Provides a new perspective on your PTA's ideas and programs.
- Allows students to participate in the planning and execution of PTA programs. Young people's viewpoints and ideas are essential because all PTA programs focus on youth.
- Puts the PTA Purposes into action.
- Gives students a better understanding of adults and adults a better understanding of students.
- Introduces students to the legislative process through your PTA's involvement in legislative activities.
- Increases the number of skilled volunteers in your PTA to conduct more programs.

## Benefits to Students

- Provides a critical student perspective for PTA ideas and programs because they know what's happening in their school.
- Provides an open forum for discussing students' needs in their school. They'll be expressing views to people who share their concerns about education, including teachers and administrators who make the final decisions.
- Allows students to speak for themselves instead of being spoken for.
- Enables students to make a difference in their community and school through involvement in programs that address issues of interest to students.
- Encourages students' personal growth and development.
- Creates a direct connection to Texas PTA and National PTA, which gives a voice at both the state and national levels.
- Allows them to participate in meetings and forums with their PTA officers. Learning means doing in PTA.
- Teaches valuable leadership skills, such as parliamentary procedure, public speaking, decision-making, and conflict management.
- Provides a deeper understanding of public education and how it works.
- Gives students an equal opportunity, equal responsibility, and an equal vote.
- Enables them to develop valuable relationships in the community to assist transitions from student to adult.
- Enables students to meet people and get involved in their school and education. Students can impact school policy or have a voice in determining the direction of their education.

## Seven Steps to Student Engagement

Certain legal restrictions may apply to student involvement. Refer to the Texas PTA Policy on Local and Council PTA Bylaws on the Texas PTA website for more information.

1. Discuss student engagement with your PTA's board.
2. After your board has agreed to actively recruit student members, have them formally commit to youth involvement. This should be in the form of a motion or action item. Consider whether a change in your bylaws is necessary. Refer to the Texas PTA Policy on Local and Council PTA Bylaws on the Texas PTA website for more information.
3. Promote student membership. Advertise PTA, PTA activities, and the advantage of student participation to students, parents, teachers, and the community.
4. Include students on PTA committees.

5. Develop and implement programs that involve both students and adults. Make sure students are included in the initial planning stages and the execution of the project.
6. Allow students to have an active voice in your PTA. Listen and consider what students say, even if their ideas seem unorthodox or impossible to implement.
7. Elect students as officers.

### **Recruitment and Retention of Students**

#### Recruiting:

- Ask for help. Most students are willing to help if asked.
- Stress PTA results. They want to know, “What’s in it for me?”
- Publicize all PTA achievements, benefits, and upcoming activities through surveys, newsletters, forums, or social events.
- Set up a bulletin board with pictures and notices of PTA programs in high-traffic areas in school and throughout the community.
- Keep people who make referrals informed of PTA programs for students.
- Telephone parents to explain what their child will be doing or make a home visit to meet parents personally.
- Make a presentation before the student council, stressing the advantage of PTA membership for students.
- Enlist the student council and honor society’s support, and listen to members’ ideas for involving students.
- Emphasize that PTA can be fun, using logos, T-shirts, music, display boards, videos, and images on social media, and more.
- Hold recruitment drives where every student member agrees to bring another student into the PTA.
- Make students realize their membership is integral to your PTA, not just a temporary goal. Students should be part of the recruitment process as well as its result.
- Conduct programs, projects, and activities geared toward students.
- Concentrate on attracting students who might not ordinarily participate.
- Involve students in the National PTA Reflections program so they see how PTA activities relate to special interests.
- Stress how they will feel about helping the school and community, being with friends, and learning new skills.

#### Retaining:

- Provide students with the means to evaluate their PTA experiences.
- Avoid segregating student members. Students should be full members who enjoy full privileges, pay full dues, have full membership, and have full responsibility within the bylaws.
- Everyone must have the attitude that student engagement is going to work. Students, parents, and teachers must be willing to work together.
- Practice effective communication. Be understanding, patient, and sensitive. Just as youth have much to learn from adults, adults have much to learn from youth. Create a supportive atmosphere where students and adults listen to one another, express their views openly, and share their expertise.
- Implement a student recognition or award system. Students deserve to be recognized and rewarded for their contributions to PTA. The criteria developed must be fair for all participants. For example, students are rewarded for leadership, vision, and dedication instead of “token” activities such as selling candy or working at a booth.
- Implement a “student support system” in which veteran student and adult members provide recruits with motivation and encouragement, direction and foundation for student growth and development, and a sounding board for stress and frustration.

### **Consent Form - Permission for Minor to Serve as Officer or Chair of a Local or Council PTA**

Student members under 18 are required to bring a signed consent form to the Local PTA or Council PTA President. Parents, legal guardians, or a legally authorized person must sign this consent form permitting minors to serve as an officer or chair of a Local or Council PTA.

# Effective Strategies: Celebrate Your Successes

One of the responsibilities of Membership chairs that is often overlooked is celebrating success, but it is critically important to engage with members. When you are successful, shout it from the rooftops! People want to be a part of a successful group. Celebrating your success accomplishes two goals - 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 successes with your membership.
  - Have you reached a goal or new milestone?
  - Have you earned an award for staff, men, students, grandparents, or 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.
  - At each membership meeting, let members know how many members you have and what awards you have earned. Share how non-members can join.
  - Be sure all printed material has the name of your PTA clearly visible.
  - Have a large banner made for your PTA that can be displayed at every event that your PTA sponsors. Make PTA visible! Members will return if they find value in the organization.
- Share your successes 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 collects and publishes success stories and wants to hear from you! What's worked in your community? Would you like some fresh ideas? Consider sharing your ideas and stories in the Texas PTA Idea Share Group on Facebook.
- Apply for Texas PTA Membership Awards
  - Watch the Texas PTA website each August for criteria!
  - Reaching membership milestones
  - Increasing membership
  - Successfully engaging specific member groups
  - Achieving special membership challenges
- Share your successes with non-members
  - Ask your school to send out information on PTA to all parents to help encourage new memberships. Parents won't join if they aren't asked. Remind them how to join and why they should.
  - Consider sharing how great your PTA is doing on neighborhood pages to encourage neighbors to join the PTA.

# Tracking and Reporting Members

## Tracking Members

Why is it important to track who is and who is not a member? Only members can bring motions, debate, and vote on PTA business at membership meetings. In addition, your PTA may offer member-only benefits like a directory, no-waiting access at events, member-only events, discounts on school supplies or spirit wear, etc.

Because people can join in various ways, it is important to create one master roster shared with the president, treasurer, and secretary. The membership roster should not be shared elsewhere.

## The Membership Roster

Texas PTA offers two opportunities to create and maintain your membership roster.

- **myPTEZ Roster.** myPTEZ is a free cloud-based membership management system. Members can be uploaded or added individually at any time. After logging in, the Membership Management features can be found in the Admin section.
  - Use the Print Directory Report to see a complete list of your PTA members. Select a date range on the Print Dues Summary report to print the membership roster you send to Texas PTA each month. This report will automatically calculate dues owed, including the discount for Honorary Life Members.
  - Members who joined through [jointpa.org](http://jointpa.org) have MyPTEZ or API in the Source column and will not be included on the Print Dues Report.
- **Traditional Roster.** Texas PTA offers an Excel spreadsheet that can be used as a template for tracking and submitting members.



All membership rosters should include your PTA name, school district, and Texas PTA ID number. It should also note the member's name and contact information, their join date, and member type. Member type will help track your progress toward Special Category Awards and identify those recognized as Honorary Life Members.

Honorary Life Members may only use their benefit at one PTA per year. Confirm status at [txpta.org/volunteer-recognition](http://txpta.org/volunteer-recognition).

## Reporting Members

The busiest time to recruit members is usually at the beginning of the school year, but membership recruiting and reporting should be year-round. Work with your treasurer to ensure you don't miss out on a membership award!

Anyone joining through [jointpa.org](http://jointpa.org) should not be reported to Texas PTA.

For all other members, reporting should be done quickly and often. According to the bylaws, membership begins when Texas PTA receives the roster and dues. Member names and dues should ideally be reported to Texas PTA within five business days of joining, but you should report at least monthly.

Use the following steps to upload your members digitally:

1. Enter new members into your myPTEZ account.
2. Download the Print Dues Summary (in CSV format) from myPTEZ.
3. Request funds through the Funds Request Form.
4. Verify available funds and notify the Treasurer of the expected ACH date.
5. Upload the Print Dues Summary (CSV file) from myPTEZ to [txpta.org/member-dues-and-cards](http://txpta.org/member-dues-and-cards).

A few common mistakes to avoid when uploading members into your myPTEZ:

- You must enter an email address. If not provided, we suggest using a generic PTA email address so you can print the digital cards and send them home to the member.
- The Member Year is always the start of the school year. For example, you will use 2023 for the 2023-2024 year. This also means in the spring of 2024, you will still use 2023 as the member year.
- Avoid using any unnecessary punctuation in your submission. For example, do not use Mr. Smith; just use Mr Smith (no period after Mr)

- If you have no new members for the month, do not submit a blank CSV file to Texas PTA. Only submit a file when you have new members to upload.

Additional tips:

- If entering a student or another family member, you can use a previously used email address. For example, the student might use the same email address as a parent.
- Use the member type column to help track your special category awards.
- When uploading your spreadsheet into myPTEZ, if you get any errors, myPTEZ will typically identify the error and what row to correct.

If you need assistance with your upload, contact your Field Service Representative or Council Membership Chair, if applicable. You can also email the Texas PTA VP Membership at [vpm@txpta.org](mailto:vpm@txpta.org) or Member Relations at [memberrelations@txpta.org](mailto:memberrelations@txpta.org).

See the training videos at [txpta.org/member-dues-and-cards](http://txpta.org/member-dues-and-cards). These videos will walk you through the process step by step and help you avoid common mistakes. Using the “Submit Digital Rosters, Pay Dues, and Send Electronic Membership Cards” process will send your members their digital membership cards. For this process to work, you must collect email addresses for all members. Some community members may be hesitant to share their email. Properly communicate what emails they should expect to get from your PTA. Letting them know they will get their digital membership card via email is a great way to ensure they are more comfortable sharing it with you.

Use the following steps to mail your roster and check to Texas PTA:

1. Request from the treasurer a check for the Texas and National PTA dues owed for each member who joined since you last reported.
2. Report only the names of new members for which you are submitting dues each month.
3. Mail the original membership roster and dues check to the Texas PTA office.
4. Ensure that the treasurer is reporting the Texas and National portions of dues as a liability rather than as income to the PTA and ensure all members are accurately reported promptly to Texas PTA.

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See the Texas PTA Dues Refund Policy at [txpta.org/policies](http://txpta.org/policies). Texas PTA will not reimburse overpayments or dues reported in error outside this policy.

# Texas PTA Membership Resources

## The Everyone Can Campaign

Don't have time to create a logo or recruitment materials? We've got you covered!

The Everyone Can Campaign is a fresh approach to “back the future” – a phrase so well known and used by our volunteers it has become synonymous with PTA in Texas. The campaign builds on the strong foundation of the original phrase and expands its meaning: PTA is not an exclusive club defined by any one person. We are a vibrant group of people from all walks of life, representing the diversity within our communities.



The Everyone Can Campaign and its hashtag, #YouCanPTA, clear up any misconceptions about joining PTA. If you care about your community's schools and students, you belong in PTA.



We encourage all PTAs to use the campaign with their volunteers, the school, and the wider community. Review the brand guidelines booklet in the online toolkit to learn how to best leverage the customizable resources.

Find all the resources you need, including social media frames, a customizable logo, Zoom backgrounds, campaign posters, and more, at [txpta.org/back-the-future](https://txpta.org/back-the-future).

## JoinPTA.org

Joinpta.org makes joining, recruiting, and tracking members easy. JoinPTA.org is always available, allowing anyone, anywhere, to join online using a credit or debit card at any time. JoinPTA.org members are automatically emailed a digital membership card. They are automatically added to your free myPTEZ account. The local portion of dues is sent by ACH to your linked PTA bank account on the seventh business day of each month.



Recruiting with JoinPTA.org is easy!

- Email the link to everyone who was a member last year.
- Frequently share the link on your social media posts.
- Families that do not frequently come into the school or attend meetings can easily join.
- Out-of-town family members will find it especially easy to join.
- Community leaders will find this an easy place to join.

Learn more at [txpta.org/join-pta](https://txpta.org/join-pta).

## myPTEZ

Every Local PTA in Texas can use this free web-based system to manage membership. myPTEZ provides excellent online support and easy tracking of member names, statuses, and contact information. myPTEZ also offers an online store and financial management system for a fee.

We are proud to bring you this excellent benefit that makes your volunteer job easier!

Learn more at [txpta.org/myptez](https://txpta.org/myptez).

## Membership Cards

Membership cards in Texas are a tribute to our amazing students! Using the Digital Roster and Dues submission will provide your members with an amazing digital membership card with Reflections artwork created by Texas students.

Local PTAs can also opt to receive printed English or Spanish membership cards.

*Remember, digital cards are automatically sent to anyone who joins through JoinPTA.org.*

## Local Roster

Texas PTA publishes a roster in Google Drive that is a great tool for leaders to review their PTA's status, membership awards, membership numbers, and much more! We highly recommend bookmarking this roster, as it should be a tool you check often. [Local Roster](#)

## Texas PTA Ideas Share Facebook Group

Our Facebook group enables you to share ideas and ask others what tips and tricks they use at their campus to increase membership. We want to see all the great things your PTA is doing, so join now!

## Training

To ensure that our leaders are equipped for the job, Texas PTA provides an online learning portal with many courses available at your leisure.

- FOUNDATIONS: Essentials is an introductory course for new PTA leaders in English and Spanish.
- FOUNDATIONS: Basics provides more in-depth job-specific training.
- FOUNDATIONS: Spotlights provides task-specific training.

## Support

Help is just an email or phone call away. Your PTA has been assigned a Field Service Representative (FSR) to assist you. Find your FSR on the **Need Help** tab of the Local Roster. Staff is available 8 a.m. to 5 p.m. each business day. The Texas PTA Vice President Membership and the membership committee are also great resources. You are welcome to email the Vice President Membership at [vpm@txpta.org](mailto:vpm@txpta.org).

## Membership Recognition

Volunteers are our greatest asset, and Texas PTA is proud to recognize the hard work of both Local and Council PTA volunteers through membership awards. Find all details regarding monthly, special category, Voice for Every Child, and President's Challenge awards at [txpta.org/local-and-council-pta-awards](http://txpta.org/local-and-council-pta-awards).

## Connect Programs

Connect programs are designed to empower parents, teachers, and students by providing relevant information to help navigate the evolving culture our students and children experience daily. Programs include 5-Keys, Cyberbullying (David's Law), Kids First, Mental Wellness (Primary), SEL Curriculum Grant, and True Colors. See full descriptions at [txpta.org/connect-programs](http://txpta.org/connect-programs).

## National PTA's Schools of Excellence

This program supports and celebrates partnerships between PTAs and schools to enrich all students' educational experience and overall well-being. The path to excellence starts with a joint commitment of PTA and school leaders to work together to achieve PTA's National Standards for Family-School Partnerships.

## Reflections

Reflections has been a staple arts program in many schools for over 50 years. Through the efforts of our Local PTAs, millions of students have found a creative outlet in the areas of dance choreography, film production, literature, music composition, photography, and visual arts. For full details, see [txpta.org/reflections](http://txpta.org/reflections).

## Student and Faculty Scholarships

For over 100 years, Texas PTA's primary goal has been to support Texas students and faculty members in reaching their full potential through continuing education. Since the scholarship program began, more than \$500,000 has been awarded to graduating high school seniors and faculty members. Each year, Texas PTA awards \$1000 to eligible high school seniors and up to \$500 to eligible faculty members at any school level that has a PTA/PTSA on their campus. Learn more at [txpta.org/scholarships](http://txpta.org/scholarships).

## Educator of the Year Awards, Share the Love

Each year, Texas PTA encourages PTAs to share the love and nominate educators who truly back the future of every child in their communities. Do you know an amazing teacher, principal, or superintendent who gives extra to ensure all students are successful? 'Share the Love' and nominate those outstanding educators from your community.

## Member Perks

In addition to adding their name and voice to your school's PTA and the largest child advocacy association in the state, members can take advantage of perks offered by PTA partners. Visit [txpta.org/member-perks](http://txpta.org/member-perks) for more information.

## Texas and National PTA Recognitions

Special recognitions are available from Texas PTA and National PTA. These awards may be presented at any time, but one ideal time for presenting the awards is in February, when we celebrate the formation of PTA on Founder's Day, February 17, 1897.

- The *Texas PTA Honorary Life Member Award* is one of the highest honors presented to individuals for outstanding service to children and youth in Texas. The presenting PTA can establish the award criteria locally as long as they can articulate the recipient's worthwhile contribution to the well-being of children and youth.
- The *Texas PTA Extended Service Award* was created in 1987 by the Texas PTA Board of Directors. A Texas PTA Extended Service Award is awarded to those who have continued to give outstanding service to Texas PTA, have been a recipient of the Texas PTA Honorary Life Member Award, and have been actively involved in Texas PTA for 10 years.
- *National PTA Life Achievement Award* is the highest honor from the nation's largest child advocacy association to the person who lives out their commitment to children daily. More information about this extremely prestigious award can be found on the National PTA website, [pta.org](http://pta.org).

## Membership Envelopes

Texas PTA offers packs of membership envelopes that make it easy for your community to include their membership dues and send them back with their student. This is a great tool for cash and check families.

Contact [memberrelations@txpta.org](mailto:memberrelations@txpta.org) for envelopes. Some PTAs have an online membership site. Work with your PTA executive board to determine how to use this to recruit members.



## Shop PTA

[ShopPTA.com](http://ShopPTA.com) sells official PTA and PTSA logo apparel, membership items, awards, and gifts.

# Ideas to Inspire You

We all need a little inspiration at times. This section provides ideas that can help get your creativity flowing. If you are looking for more ideas or have ideas and successes to share, join the Texas PTA Ideas Share group on Facebook.

## Membership Campaign Ideas

- Be ready to answer the question, 'Why should I join?'
- Brag about your PTA's past accomplishments and goals for the year.
- Know the vision and mission of PTA.
- Work with the principal to translate your PTA communications into all languages spoken in your community.
- Use every form of communication available - school and PTA e-news, websites, social media, email lists, fliers, posters, bulletin boards, marquees, and signs. Walk the drop-off and pick-up lines.
- Have someone from the membership committee attend every PTA event (back to school, new family social, and so on). Set up a table or walk around meeting people and ask them to join PTA.
- Display banners at PTA events that state, "This event is sponsored by the PTA."
- Create a brag board with pictures, flyers, and programs you can take to meetings and all school events. Make it attractive and interesting. People will want to join an active, involved PTA.
- Consider making a decal or stickers for your teachers and community members to display proudly. It helps the community know they support your PTA, and it promotes your PTA!
- Host a challenge between classes, grade levels, or teacher teams. Incentives are always fun! Consider a treat for the winning class, grade level, or teacher team.
- Host a challenge with a rival school. The PTA with the most members added in a month has to wear the school colors of the rival school.
- Host a members-only event, but be sure to have a membership table at the door so new members can join before entering.
- Provide a member incentive, like no waiting in line or early access to an event.
- Cut a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.
- Distribute new member packets containing fact sheets about the membership, parent education opportunities, newsletters, and activities in which your PTA is involved. Be sure to include materials about how to join your PTA.
- Distribute business cards with a name to contact that current members can give to potential members while in the community. Your current membership is one of your PTA's best assets!

## Inclusive Recruitment

- Don't assume everyone knows what PTA is. Be sure to be able to explain our mission and vision to help other parents want to share in that passion.
- Don't forget to ask groups that may not be familiar with the concept of PTA or are different from previous members.
- Ask your community what they want to see from the PTA. This allows them to feel like their voice is heard and could create future leaders.
- 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.
- When talking to a group of community members at an event, do not be afraid to engage those not fully listening. They might just need a warm welcome.
- 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.

## 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).

Research shows that “four in ten 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 the 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.
- Communicate directly to men.
- Challenge current male members to ask others to join.
- Articulate the importance of men in education.
- 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.
- 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 and 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.

### **Middle and High Schools**

- It is imperative to survey the school community to determine their needs to be relevant in secondary schools. Include the community as a whole - 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 membership chair. Let people know you are prepared to work together.
- Use the Back the Future Everyone Can campaign to celebrate your members and display the images in 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 highest number of members or the one with 100% membership. (Do not list the names of students who have or have not joined.) These awards might include
  - 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.

### **Students**

Students are our future. We all know that, but we often ignore that they are also the future of PTA.

- Set up a PTA/PTSA table on student registration days and other school events. Highlight activities that benefit students.
- Challenge a nearby school to a friendly student membership competition.
- Have students host the membership table and invite their friends to join at open houses, back-to-school nights, and orientations.
- Provide small incentives for student members. (discounts or first-in-line pass at events, lanyards, stickers).
- Consider hosting a student-member event to reward them, such as a pizza party for all student members. Remember to promote it beforehand so students can join the PTA.
- Invite student members to share input on PTA events, such as PTA spirit wear.

### **Teachers and Administrators**

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

- Enlist the help of the principal.

- Personalize invitations and remind teachers of PTA's vision, mission, and purposes. Each school is an independent PTA, so joining at work is essential to support the school even if they are members of 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% membership is achieved. If your PTA earns the Golden Apple Award, host a dessert apple bar to celebrate!

### **Grandparents**

Grandparents hold a special place in a child's life. Inviting grandparents to join their grandchild's PTA allows them to feel included in their grandchild's education.

- Host a grandparents event and encourage them to join the PTA.
- Celebrate Grandparents Day and create special invitations. Students can send their grandparents an invitation asking them to join the PTA.

### **Community Members**

Schools are an integral part of our communities. What better way for community members to discover what is happening in those schools than to join the PTA and support the students whose families live, work, and shop in the community and who are the community's future? 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.
- Ask local pediatricians and hospitals to post or display membership information. Include PTA materials in packets that local hospitals give to new parents.
- Ask permission to post flyers in community libraries and child-oriented businesses.
- Join your community welcome committee. Put your PTA information in their welcome packets.
- Write letters to the city council, elected officials, and school board members encouraging them to join.
- Attend Homeowner Association, Rotary, Optimist, and Kiwanis Club meetings and recruit their members.
- Host a PTA table at any/every community event.
- 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 promote PTA among their employees/members.
- Ask local businesses to use their marquee to promote your PTA, activities, and events.

### **How the Committee Can Help**

The following are some ways you can get other PTA members to help with membership:

- 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.
- Inform members of membership goals the PTA has met and encourage continual recruiting of membership to meet new goals.
- Write thank you notes to members.
- Use social media to recruit members throughout the year.
- Review and evaluate past membership efforts.
- Set a goal for members to be recruited.
- Send an 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 the coming year.
- Use PTA and school websites, newspapers, radio and television, and community resources to promote 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/business people in the community to recruit as members.

- Complete any other activities that the Membership Chair cannot complete alone.

### **How the Executive Board Can Help**

- Translate all communications (paper, electronic and verbal) into your families' languages. Seek help from school staff or community leaders if needed.
- Make sure meetings and communications are welcoming and accessible to everyone. Consider the meeting time, location, and accessibility. Consider non-traditional families.
- Create a friendly climate. Choose activities that appeal to different groups.
- Invite everyone, 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 crafts shows, sporting events, and food experience days. (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.)
- Survey the community to determine areas of interest for programs.
- Elect or appoint students as executive board members. Emphasize the learning opportunities inherent in being a PTA leader
- Publicize the Texas PTA High School Senior Scholarship requirements. Many Councils and Local PTAs also offer scholarships to graduating seniors who have been involved as PTA members.
- Publicize that 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.
- Elect or appoint a teacher to the executive board.
- Survey all teachers mid-year, asking if they joined PTA, why, and why not.
- Send all teachers information about the Texas PTA Faculty Scholarships.
- Include meeting notices in child-oriented publications in your community.

# Fiduciary Duty

The Internal Revenue Service (IRS) (as included on Form 990) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including executive board member “fiduciary duty.”

Fiduciary duty is a legal responsibility to act in the best interest of another person. Fiduciary implies a level of trust that is necessary to represent our members.

Executive board members have three fundamental fiduciary duties:

- The **duty of care** means that an executive board member actively participates, attends executive board meetings, is educated on the industry, provides strategic direction, and oversees the daily operations of the PTA.
- The **duty of loyalty** requires an executive board member to operate in the interest of the PTA and not to use their position to further a personal agenda.
- The **duty of obedience** requires an executive board member to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS and the Texas State Comptroller’s Office. Obedience to governing documents requires a deep understanding of the operating documents (bylaws, standing rules, policies, executive board resource guides, and required Texas PTA training). Finally, obedience requires that an executive board member not act outside the scope of the PTA’s legal documents.

Fiduciary duty in PTA means the executive board members act as trustees of the organization. This includes exercising due diligence to oversee that the organization is well-managed and that its financial situation remains sound.

# Finance for Executive Board Members

## Financial Considerations

Every executive board member should be knowledgeable about the financial responsibilities of the PTA. Below is basic information on finances that every executive board member needs to know. There is much more involved in the daily financial management of a PTA...these are the basics.

## Budget Basics

The budget is a financial representation of the activities and operations a PTA expects to conduct during the PTA's fiscal year. An adopted budget must be in place at all times for fundraisers to be conducted and expenses to be paid. The budget for the following year is presented and adopted by the membership at the last membership meeting of the year. It is amended at the first membership meeting of the next fiscal year based on approved plans of work submitted by the incoming executive board. The membership always approves expenses and income via the budget, which can be amended as needed.

## Payments

Payments are never made in cash, and signed blank checks are never handed out. All payments must relate to an adopted budget line item and have a [funds request form](#) attached with a receipt and/or invoice.

## Deposits

To protect the PTA and its volunteers, PTA funds should always be counted and verified by the signature of two individuals on the Deposit Form found at [txpta.org/treasurer](http://txpta.org/treasurer). All signers should retain a copy or image of the completed deposit form. The treasurer may be one of the two counters unless prohibited by the PTA's standing rules.

All money should be deposited in the bank on a daily basis. Never deposit money in a personal account or leave the money in someone's home. Cash should never be taken from an event's collected money to use to pay expenses, reimburse individuals, or use as start-up cash for a later event.

## Banking

PTA money cannot be mingled with other funds and must be kept in a PTA bank account at a financial institution. The money of another group or organization is never deposited into a PTA account. Any request to use a PTA bank account is unacceptable and possibly illegal, even if it costs the PTA no money. Money can never be "turned over" to the school and/or principal to spend at their discretion.

## Financial Reports

To keep members informed, a financial report is presented at every regular executive board and membership meeting. The report covers the financial transactions since the last meeting of that type. The report should include each budget line's current period actuals, year-to-date actuals, and adopted budget amount. The verbal report should include the starting balance, total income, and expenses for the current period, change to sales tax liability during the current period, change in state/national dues liability during the current period, ending cash balance, and ending balances of the sales tax liability and state/national dues liability accounts. Your financial software may refer to liabilities as escrow or off-budget. As the funds belong to the members, they have the right to access the financial reports presented at any membership meetings. See a sample financial report at [txpta.org/treasurer](http://txpta.org/treasurer).

## Statement Reviews

The president appoints a member, subject to the executive board's approval, who is not authorized to sign on the bank account to review each PTA account statement. The statement reviewer utilizes the [Texas PTA Statement Review by Non-Signer Form](#). The secretary presents the result of this review at the next executive board meeting. If the reviewer identifies items for further review on the Statement Review by Non-Signer form, these items should be investigated by the executive board. The results of the investigated items should be attached to the Statement Review by Non-Signer form. If evidence of theft, fraud, or embezzlement is discovered, the Theft, Fraud, and Embezzlement Policy found at [txpta.org/policies](http://txpta.org/policies) should be followed.

## State and National Filing Requirements

The executive board verifies that all filing requirements and tax obligations are completed. At a minimum, this includes filing the IRS Form 990 and having proof of acceptance by the IRS within 60 days of the PTA's year-end.

## Financial Reconciliation

A financial reconciliation is required to be performed: at the end of the fiscal year, when any authorized check signer is added or deleted on any bank account, and at any time deemed necessary by the president or three (3) or more members. The president appoints the financial reconciliation committee consisting of no fewer than three (3) members who are not authorized signers, the current secretary, the incoming treasurer, a majority of student members related by blood or marriage or reside in the same household as the authorized signers or current secretary. The financial reconciliation committee report is adopted by a majority vote of the members at the regular membership meeting immediately following the financial reconciliation.

## Financial Mismanagement

Mistakes in managing the PTA's finances can occur, and sometimes a trusted individual will take advantage of their role in the PTA for their own financial benefit. It is important to seek help from your Council president or FSR as soon as possible to limit any additional losses to the PTA. If theft, fraud, or embezzlement is suspected, the PTA is required by the bylaws to follow the Texas PTA Theft, Fraud, and Embezzlement Policy found at [txpta.org/policies](http://txpta.org/policies).

## Financial Red Flags

- Bank statements are not seen by the treasurer and nonsigner monthly.
- Financial reports are not given at executive board or membership meetings.
- The beginning balance of a financial report doesn't agree with the last reported ending balance.
- Amounts in the financial reports do not balance the total.
- Money is counted by only one person.
- Checks or deposits are missing.
- Checks are made payable to a check signer's family members.
- Checks are made payable to "Cash."
- Checks are payable to the same payee made out for the same amount each month.
- Two or more signers on the bank account are related by blood, marriage, or reside in the same household.
- Receipts are missing from funds request forms.
- The membership did not approve the budget.
- The membership did not approve fundraising activities.
- The amount of profit doesn't agree with the amount in the contract signed with the fundraising company.
- Less money was deposited for a fundraiser than paid to the company for the product received.
- Bills are received for unbudgeted items.
- Individual PTA members profit monetarily from any fundraiser.
- Children are used to raise funds for PTA.
- The required annual financial reconciliation report was not presented to the membership at the first membership meeting of the new year.
- The financial reconciliation committee consists of signers on the bank account or of individuals related to those signers.

## IRS 990 Filing Requirements

All PTAs are classified as tax-exempt 501(c)(3) nonprofits under the Internal Revenue Code and must submit a 990 return to the IRS. Texas PTA requires PTAs to electronically file the appropriate IRS Form 990 and have it accepted by the IRS within 60 days of the PTA's fiscal year-end. PTAs must file one of three IRS Form 990s annually:

- The 990-N is required for PTAs whose gross receipts are \$50,000 or less.
- The 990-EZ and Schedule A are required for PTAs that gross more than \$50,000 but less than \$200,000.
- The 990 and Schedule A are required for PTAs who gross \$200,000 or more.

Proof of the 990 filing is presented at the first executive board meeting of the year. For more details on financial procedures for your PTA, visit [txpta.org/treasurer](http://txpta.org/treasurer).

# Protecting Your PTA with Insurance

Texas PTA strongly encourages PTAs to obtain adequate insurance protection against liability and financial loss due to fraud, embezzlement, or dishonest acts.

Texas PTA negotiated a group discount with Association Insurance Management (AIM) (800-876-4044) to obtain insurance coverage at affordable prices. Similar coverage may be obtained from any insurance company, locally or otherwise.

AIM offers several types of coverage listed below, and PTAs may secure any combination of coverage at any time during the year. Additional information may be found at [txpta.org/pta-insurance](http://txpta.org/pta-insurance).

## Event/General Liability Coverage

- \$1,000,000 or \$2,000,000 liability coverage per occurrence (no deductible)
- Protection from lawsuits if someone is injured at one of your events
- \$5,000 per person medical payment included (no deductible)
- Option for increased medical payments: \$10,000, \$25,000, and \$50,000
- Option for Media Liability to cover misuse of the content on your PTA website or social media
- Option for Hired and Non-owned Auto Liability
- Option for Abuse and Molestation Coverage

Event/general liability insurance covers carnivals, bounce houses, dunking booths, fun runs, skating parties, auctions, and more.

## Directors & Officers Liability Coverage

- \$1,000,000 liability limit (no deductible)

If someone sues the officers of your PTA for mismanagement, misrepresentations, dissemination of false or misleading information, or inappropriate actions, this coverage pays to defend them against those actions.

## Embezzlement Coverage (Fidelity Bond)

- Coverage available: \$10,000 to \$250,000 (usually based on annual revenue)
- \$250 deductible

Embezzlement insurance covers monetary losses sustained by a PTA through any fraudulent or dishonest act(s) or embezzlement committed by any of the elected officers, members, volunteers, or employees.

*Note: For embezzlement insurance to apply, a PTA must have account statements reviewed monthly by a non-signer and conduct an annual financial reconciliation.*

## Business Personal Property Coverage (Inland Marine)

- Coverage available: \$10,000 to \$250,000
- \$250 deductible

Property insurance covers items such as raffle merchandise, auction items, and fundraising supplies while in your PTA's care, as well as your PTA's personal property like popcorn machines, school store supplies, emergency relief supplies, and more.

# Training & Learning Resources

Texas PTA believes that volunteer at-home accessibility to FOUNDATIONS Training is important. As such, all required training is located at [txpta.org/courses](http://txpta.org/courses). Our volunteer leaders across the state can access quality educational resources to support success within their roles and build strong PTAs.

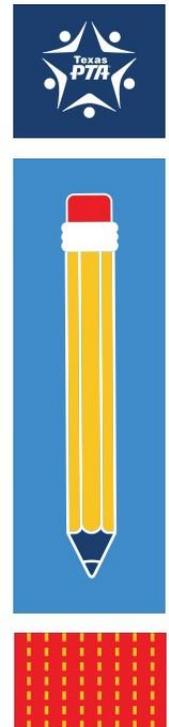
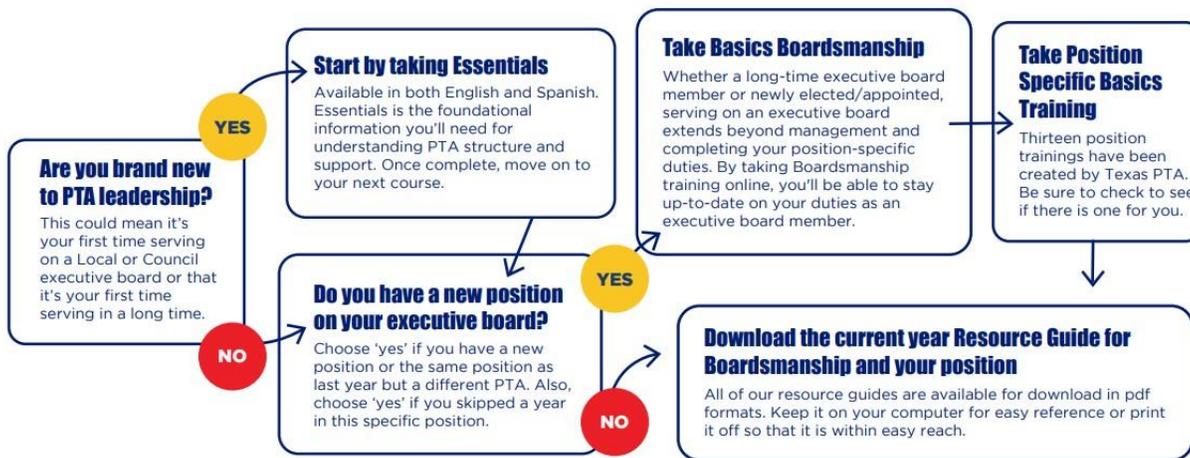
## FOUNDATIONS Required Training

- **Essentials** is a high-level orientation to PTA, taken online via the Texas PTA website at [txpta.org/pta-training](http://txpta.org/pta-training). It contains the mainstay information that every PTA Leader should know. Executive board members should take this training at least once in their PTA career. Leaders are encouraged to take Essentials (formerly titled Foundations Leader Orientation (FLO) and Leadership Orientation Training (LOT)) again whenever the training is updated.
- **Basics** courses contain detailed information to support PTA Leaders in their executive board position. Every executive board member must attend a Basics course for their position at least once every two years. These training sessions are available on-demand at [www.txpta.org/courses](http://www.txpta.org/courses). Basics content includes an online training video, a companion Resource Guide, and other supporting resources.
  - a. PTA Leaders can access the Resource Guides via the Texas PTA website. Visit [txpta.org/local-pta-leaders](http://txpta.org/local-pta-leaders) to download free PDFs.

Reminder: Both Essentials and Basics courses are mandatory for executive board members. The path to ensure that all required training has been completed is explained in the following graphic.

## PTA Online Training | Where Do I Start?

*Texas PTA requires all Local and Council board members to complete FOUNDATIONS Essentials training once in their PTA career. Position-specific Basics Training should be completed each time a PTA executive board member changes positions or campuses. All trainings can be found online at [txpta.org/courses](http://txpta.org/courses).*



## FOUNDATIONS: Spotlights

Spotlight courses offer short, in-depth reviews of important topics and recurring PTA functions, such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections. Spotlights are free and optional but offer vital insights on specific and timely topics.

## Newsletters and Alerts

Texas PTA provides content-specific newsletters based on your PTA position. Registering as an executive board member with Texas PTA each year helps ensure you receive important updates and position-specific newsletters! Visit [txpta.org/officer-intake](http://txpta.org/officer-intake) to access the form.

All executive board members are encouraged to closely follow Texas PTA legislative advocacy efforts by subscribing to Under the Dome, our advocacy newsletter, at [txpta.org/newsroom](http://txpta.org/newsroom). You can sign up for advocacy Action Alerts at [txpta.org/take-action](http://txpta.org/take-action).

### **Leadership Development Resources**

Texas PTA training goes beyond the FOUNDATIONS by offering Leadership Development resources. The topics covered result from polling PTA leaders across the state.

All PTA leaders are encouraged to visit [txpta.org/leadership](http://txpta.org/leadership) to discover Extra Credit courses to continue their leadership development and to investigate the Full Circle Leadership program.

# Texas PTA Staff and Board of Directors Support

## **BOARD OF DIRECTORS** | [txpta.org/bod](https://txpta.org/bod)

The Texas PTA Board of Directors are your volunteer representatives at the state level. From the president to the directors at large, Texas PTA Board members can help answer your questions and address your needs. You can reach them at the address above.

## **COMMUNICATIONS** | [communications@txpta.org](mailto:communications@txpta.org)

The Communications team manages and produces all Texas PTA communications, including *The Voice* (our quarterly newsletter), specialized newsletters (advocacy, healthy lifestyles, arts in education, environmental awareness, membership, and field service), social media outlets, and the Texas PTA website. They also serve as Texas PTA's contact for all media inquiries.

## **FINANCE** | [finance@txpta.org](mailto:finance@txpta.org)

Texas PTA understands the responsibility of managing your member dollars. The Finance team is charged with monitoring Texas PTA resources according to the annual budget, as adopted by the Board of Directors.

Members of the Finance team are also available to support PTA leaders in their compliance with state and federal financial requirements, such as filing the annual 990 with the IRS and sales tax filings with the State Comptroller.

## **LEADER ENGAGEMENT** | [leaderengagement@txpta.org](mailto:leaderengagement@txpta.org)

The Leader Engagement team gives direct support to PTA leaders and members. They assist with standards of continuing affiliation, bylaws and standing rules, organizing PTAs, and general questions on leading and managing a PTA.

## **MEMBER RELATIONS** | [memberrelations@txpta.org](mailto:memberrelations@txpta.org)

The Member Relations team is responsible for developing recruiting resources that may be adapted for all levels of PTA – early childhood, elementary, and secondary. Staff assists with member recruitment strategies, processes membership rosters and dues, and coordinates membership awards and the distribution of membership cards to Local PTAs.

## **PROGRAMS** | [programs@txpta.org](mailto:programs@txpta.org)

The Programs team is focused on connecting PTA members and leaders with the information they need to be successful and develop programs. The Programs team is your contact for student and staff programs, such as Reflections, Texas PTA's scholarship, and educators awards, as well as Texas PTA's turnkey campus program library- Connect. Whether your PTA is registering for LAUNCH or requesting a Connect Program, the Programs team is available to assist you.

# FAQs

## How much are dues?

Your bylaws dictate the total amount members pay to join.

- The total dues collected for each member is the sum of the following:
  - Local PTA dues = Amount per member according to your PTA's bylaws
  - Texas PTA dues = \$2.25 per member (*\$0.00 for Honorary Life Members*) \*Texas PTA has proposed a change in state dues that would begin August 1, 2024. Check <https://www.txpta.org/membership-resources> to confirm the dues amount for the 2024-2025 membership year.
  - National PTA dues = \$2.25 per member \*\*National PTA has proposed a change in national dues that would begin on October 1, 2023. Check <https://www.txpta.org/membership-resources> to confirm the National dues amount.
- The Texas and National PTA portion of dues must be submitted electronically or mailed to Texas PTA with the membership roster regularly. *Check award deadlines to make sure you don't miss any!*
- ALWAYS check your bylaws to ensure what you collect is the correct amount! If not, it may be necessary to have members vote to amend your bylaws.

## Where do I mail the rosters and dues?

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

## Where do I get membership cards?

Members who join on [jointpta.org](http://jointpta.org) automatically receive a digital membership card, and their name and contact information is added to your myPTEZ account.

Texas PTA provides electronic or printed membership cards to Local PTAs once PTA leaders have registered themselves with Texas PTA.

## 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 early for the coming school year at a Spring event (for example, kindergarten round-up or 6th or 9th-grade orientation), you have two options to report the dues to Texas PTA:

- Mail the Texas PTA and National PTA dues to Texas PTA on a separate membership roster, making sure to CLEARLY mark them as dues for the coming membership year and not the current one. In September, the membership chair will need to add these names to myPTEZ with an August paid date. This will prevent duplicate memberships and stop duplicate payments to Texas PTA. Contact [memberrelations@txpta.org](mailto:memberrelations@txpta.org) if you have any questions.
- Your PTA can keep the dues until August 1st. The treasurer should report the dues as a liability since this is money that does not belong to your PTA. Your financial software may refer to liabilities as escrow or off-budget. Be sure to pass on the new member names to the incoming membership chair if you are completing your term. In August, the membership chair should electronically submit or mail the roster and dues to Texas PTA, and the treasurer will need to move those dues out of escrow and into the dues income line for the current year.

## What other dates are important to know?

Each year, PTAs in Texas are required to meet minimal standards to maintain their affiliation with Texas and National PTA. The deadlines and specific requirements can be found at <https://www.txpta.org/standards-of-continuing-affiliation>.

Additionally, check the due dates for membership awards. You don't want to miss the opportunity to be celebrated! *If standards are not met, it could result in your PTA not receiving awards.*

## When is the deadline to submit or mail dues?

You should submit a membership roster and dues within five business days of any member newly joining for that membership year. At a minimum, you should submit each month.

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

### **Can people join online?**

Yes. Texas PTA offers every Local PTA the opportunity to be listed on [joinpta.org](http://joinpta.org) by simply completing the form found at <https://www.txpta.org/join-pta>. There is no cost to the PTA to be listed. This makes inviting members inside and outside of your community easy and convenient. Registering for [JoinPTA.org](http://JoinPTA.org) also provides every PTA with the additional benefit of a free membership management software system provided by myPTEZ.

- Names and contact information of members who join online are automatically added to your free myPTEZ account.
- There is no need to submit a roster or check for these members. Members who join at [JoinPTA.org](http://JoinPTA.org) are automatically reported to Texas PTA and immediately added to your membership count.
- Texas PTA will pay the Local Dues to your PTA approximately seven business days after the end of each month.
- If your PTA uses another online-join platform, consider being listed on [joinpta.org](http://joinpta.org) as well so those outside your community can use it. The more ways a person can join, the higher the membership number could be.

### **If we change bank accounts, how do we update our information for [JoinPTA.org](http://JoinPTA.org)?**

- Have your treasurer submit an updated [ACH Authorization Agreement](#) form (form found at <https://www.txpta.org/member-dues-and-cards>).

### **Can I record and track all members in myPTEZ?**

Yes. myPTEZ offers a simple feature to upload membership data into your free membership management system if your PTA is on [JoinPTA.org](http://JoinPTA.org).

### **Am I required to use myPTEZ for our membership management needs?**

PTAs are not required to use myPTEZ. However, if your PTA is listed on [JoinPTA.org](http://JoinPTA.org), we strongly recommend you regularly monitor your free myPTEZ membership management account to obtain your members' information.

### **Do "Honorary Life Members have to pay dues?**

Yes. If an individual wants to join your PTA and says they are a Texas PTA honorary life member, they must still pay the Local and National portion of your total dues. The list of Life and Honorary members can be found at [txpta.org/volunteer-recognition](http://txpta.org/volunteer-recognition).

Life members are exempt from paying the Texas PTA portion (\$2.25) of dues for only one 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 PTAs as they have Texas PTA Honorary Life Memberships.

Texas PTA Honorary Life Memberships do not carry automatic rights to vote or hold office in any PTA. To participate actively in PTA, an honorary life member must join a PTA by paying the Local and National PTA dues and having their 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 membership roster submitted to Texas PTA.

### **Who can view membership rosters?**

The membership roster should not be made available to anyone other than the president, treasurer, secretary, and membership chair. It is an official association document. PTA is a membership association, and we must respect the privacy of our members and volunteers. All personal information remains confidential and is not shared outside of Texas PTA.

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

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

**Does Texas PTA share leader or member information?** As a leader in Texas PTA, National PTA requires us to share your contact information with them. If desired, you can opt out of receiving National PTA communications through the unsubscribe options on its site. Texas PTA only shares your personal information with National PTA. Texas PTA respects the privacy of our members and volunteers. All personal data remains confidential and is not shared outside of Texas PTA and National PTA.

**What if we need a refund for dues we submitted incorrectly?**

Should you need a dues refund for some reason, review the Dues Refund Policy at <https://www.txpta.org/policies>.





Texas PTA



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**THIS ITEM IS FOR PTA USE ONLY**