

MEMBERSHIP

Resource Guide



How to Use

Use this guide to help you become familiar with the responsibilities of the Membership Chair and to recruit, retain and recognize members.

Who Should Use

This guide is intended for the Membership Chair and other PTA leaders who assist with PTA membership.

Table of Contents

Overview.....3,4

 Major Duties of a Membership Chair.....3

Prepare 5-7

 Dues.....5

 Membership Year.....5

 Membership Cards5,6

 Training6

 Plan of Work.....6, 26

Recruit..... 8-10

Record..... 11

Report & Remit.....12

Retain13, 14

Recognize.....15, 16

 Honorary Life Membership.....15

 Extended Service Award.....15

 Recognition Square15

 National PTA Life Achievement Award16

Procedure Book.....17

PTSAs18

Early Childhood.....19, 20

Star Spangled20

Appendix..... 22-29

OVERVIEW

PTA'S GREATEST ASSET AND RESOURCE ... MEMBERSHIP

PTA is the largest and oldest nonprofit, volunteer child advocacy association in the country. Its purpose is to make better lives for all children and youth. Because the membership of PTA comes from diverse backgrounds – geographically, culturally, and economically – this association has the potential to help every child.

Numbers give power to our voices when cooperating with other agencies and in legislative lobbying. The strength of the PTA rests in the utilization of its “people resources” to provide programs and projects that benefit youth, parents, schools and communities. An active, involved and informed membership can speak effectively with a united voice for all children and youth.

MAJOR DUTIES OF A MEMBERSHIP CHAIR

Prepare

- Review the Texas PTA Membership Quick Start Guide
- Read the Texas PTA Membership Resource Guide.
- Learn about PTA membership – be well-informed about the PTA vision, mission, purpose, policies, benefits, and dues structure of PTA
- Form a membership committee
- Attend membership workshops and training
- Prepare a Plan of Work and present to your board for approval
- Keep a procedure book and pass on to successor
- Be well versed in the member benefits provided by your Local PTA, Texas PTA and National PTA

Resources

- BASICS: Membership Resource Guide
- Texas PTA website: www.txpta.org
- National PTA website: www.pta.org
- *The Voice* (Texas PTA quarterly online newsletter)

- Membership card packet (distributed annually to Local PTA presidents in the summer from Texas PTA)
- National PTA's *The Official Back to School Kit* (distributed annually to PTAs that have registered for the kit)
- Membership Chair's Page, Membership Theme Page, Forms Page and Recognition/Awards Page on the Texas PTA website
- Learn about the Texas PTA membership theme and adapt for use in your recruitment campaign
- Set membership goals
- Decide on a recruiting method – Who? When? Where? How?
- Develop a calendar – Remember: membership recruiting is year-round
- Educate potential members and the public about PTA to include publicizing the benefits of PTA membership.

Recruit

- Launch your membership campaign before school begins at open house, orientations, etc.
- Target specific audiences with different recruiting methods.
- Use visuals such as brag boards, fliers, posters, decorated booths, etc.
- Ask, ask, ask and, then, ask again. On average, consumers must hear about a product or service three to seven times before “purchasing.” The same can be applied to PTA.
- Recruit families, faculty, community members, men, past members, PTA officers and chairs (they may forget as they were probably members when elected/appointed), school boards and businesses.
- Use multiple methods to recruit such as in-person asks, recruiting tables at all school events, newsletters, membership dues envelopes, fliers, presentations at other events/programs/clubs.
- Provide incentives by hosting contests between classes.
- Visually chart your progress towards your goal.

OVERVIEW (CONT.)

Record

Keep current records of members.

Report and Remit

- Membership dues are held in escrow by Local PTAs and should be forwarded to Texas PTA by the 15th of each month.
- Include the dues report form, membership roster and dues payment.

Retain

Care for your members: distribute membership cards, welcome members, communicate effectively, and collaborate with other committees to involve an active and interested membership.

Recognize

- Apply for membership recognition awards throughout the year.
- Form a committee to recognize volunteers with Texas PTA Honorary Life Membership, Texas PTA Extended Service and National PTA Life Achievement awards.

PREPARE

Attracting new members and retaining current ones are among the most important duties of a PTA. A strong membership is essential for PTA to be a force in decisions involving the welfare and education of children. Through your work with PTA, you are improving the lives of all children. But a thriving membership doesn't just happen; it requires good planning and year-round attention from leaders like you. Here's what you'll need to know to get started!

When you invite someone to join PTA, you are providing the opportunity to join the largest child advocacy association in the country. Members should be proud of their affiliation with PTA. Enthusiasm is your most important asset – it is contagious!

LEARN ABOUT PTA MEMBERSHIP

DUES AND MEMBERSHIP

- PTA is the largest association that offers membership to all persons concerned with the welfare of children and youth. Any individual who subscribes to the purposes and basic policies of the PTA may become a member.
- Only individuals may become members. Texas PTA does not recognize family or corporate memberships.
- An individual may enroll in more than one PTA by paying separate dues to each.
- The annual individual membership dues include three portions: national – amount designated by National PTA; state – amount designated by the Texas PTA delegates and stated in the Texas PTA bylaws; and local – as amount designated by the Local PTA members and stated in the Local PTA bylaws.

National PTA Dues	\$2.25
Texas PTA Dues	\$2.25
Local PTA Dues	Amount designated in the Local PTA bylaws

- The state and national portions of dues must be collected for each person enrolled as a member unless the person is a Texas PTA Honorary Life Membership.
- A Texas PTA Honorary Life Member is exempt from paying the state portion of their dues at only one designated Local PTA of their choice for each Texas PTA Honorary Life Membership they have been awarded.
- Life members can be verified on Texas PTA's website under "Recognition."

THE VALUE OF MEMBERS

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

MEMBERSHIP YEAR

The membership year is August 1 through July 31. Dues paid after March 15 result in membership for the remainder of the current membership year and the following membership year. See table below for examples.

<u>Join PTA on:</u>	<u>Member until:</u>
March 12, 2014	July 31, 2014
March 16, 2014	July 31, 2015
October 4, 2014	July 31, 2015
January 20, 2014	July 31, 2015
March 1, 2014	July 31, 2015

MEMBERSHIP CARDS

- Issue a membership card to each person when joining or as soon as possible. Every member has a right to access this information.
- Membership cards are available from Texas PTA Member Services during the summer as long as the officer information is on file at the Texas PTA Office. The number of cards provided per PTA is based on that PTA's previous year's membership total.
- Additional cards can be requested from Texas PTA after dues for 90 percent of the issued cards have been received at the Texas PTA Office.

PREPARE (CONT.)

IMPORTANT NOTE

- Local PTAs that have not remitted dues for at least 20 members by October 15 will be sent a letter in November stating that services from National PTA and Texas PTA may be stopped if dues for at least 20 members are not remitted before March 15.
- Spring membership dues must be postmarked by March 15 to be credited to the current membership year. Those Local PTAs that have not paid dues for a minimum of 20 members for the entire school year by March 15 will be sent a letter stating that services from National PTA and Texas PTA will be stopped until dues for at least 20 members for that Local PTA are received by the Texas PTA Office.
 - The Internal Revenue Service will be notified to remove the Local PTA from affiliation with Texas PTA's group exemption number if dues are not received from that Local PTA for two consecutive school years.

ATTEND MEMBERSHIP WORKSHOPS AND TRAINING

Training helps you be confident and knowledgeable about your job and provides valuable resources. Networking with other membership chairs allows sharing of ideas and contacts.

Membership workshops are available at Council PTA training events, Texas PTA Summer Leadership Seminar and Texas PTA Family Engagement Conference. National PTA also provides workshops at the annual convention.

PLAN OF WORK

Annually, each board member prepares a Plan of Work for approval by the executive board. A Plan of Work lists committee goals for the year and any budget needs. A clear, written plan helps keep everyone focused and on track.

A Plan of Work should:

- Be written
- Be approved by the executive board (membership approval is not necessary)

- Be an outline of the goals for that position or committee
- Describe the action steps to achieve the goal
- Relate to the broader goals set by the Local PTA
- Include a budget
- Include a listing of resources and committee members

FORM A MEMBERSHIP COMMITTEE

A PTA should have a membership chair and a committee of several members. The chair and committee plan and execute membership recruitment during the entire school year based on the Membership Chair's Plan of Work that has been approved by the Local PTA board.

Committee activities might include these action steps:

- Review and evaluate past membership efforts
- Set a goal for members to be recruited
- Use the Texas PTA membership theme
- Send invitation to parents, teachers, past PTA officers and members, life members and other prospective members
- Create a Brag Board with past accomplishments and goals for coming year
- Use PTA and school websites, as well as newspaper, radio and television and community resources to membership and the value of PTA
- Ask businesses to donate space on signboards, marquees and cable television
- Assign committee members to contact non-parent citizens/businessmen in the community to recruit as members
- Keep accurate records of names and contact information of those who join
- Have membership recruitment tables at all school and PTA events
- Distribute membership cards when dues are paid
- Complete any other activities that the Membership Chair cannot complete alone

ADDITIONAL INFORMATION:

- Texas PTA website: www.txpta.org
- National PTA website: www.pta.org
- *National PTA Quick-Reference Guide*, brochures, marketing tools, E-learning courses

RECRUIT

MEMBERSHIP THEME

Texas PTA creates a membership recruitment theme each year that is designed to be adapted for all levels – early childhood, elementary and secondary. Recruitment resources based on the theme are also available for your campaign.

SET GOALS

Goals should be clearly stated, communicated and evaluated regularly.

- Review and evaluate past membership promotions and results
- Discuss goals with the membership committee, PTA president, and principal
- Set specific, numerical goals. Examples: last year's membership total plus 10%, all faculty members, or a certain percentage of the total student enrollment.
- Determine how to effectively recruit populations that have not joined in past

VALUE OF PTA MEMBERSHIP

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

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

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

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

LOCAL PTA DUES PROVIDE:

- Connection between home and school
- Improvement in education for all children
- Parent education programs
- Source of funds for needs of children
- Unique programs, benefits provided by Local PTA
- Networking between people with similar interests and needs

TEXAS PTA DUES PROVIDE:

- Membership in the state's largest child advocacy association
- Training for PTA officers on leadership, money matters, advocacy, conflict resolution, and much more at events like Texas PTA Summer Leadership Seminar, Family Engagement Conference, and Texas PTA's biannual legislative session event, *Rally Day!*
- Parent education programs and resources on current topics affecting families
- Non-profit IRS 501(c)(3) status for Local PTAs
- Toll-free number for member assistance: 1-800-Talk-PTA
- Texas PTA website
- Assistance for financial reporting and Form 990 preparation
- Representation and a "voice" at the Texas Legislature
- Reflections Program
- Networking opportunities at PTA events
- Professional staff in the Austin state office available to answer questions and provide resources and support
- *The Voice*, Texas PTA's official newsletter, and various other e-publications
- Discounts and special offers from partner businesses for PTA members
- Guidance, support and training from a network of trained volunteers in your area

RECRUIT (CONT.)

- Legislative email alerts regarding proposed bills and new laws affecting children's education and safety
- Resources for successfully operating your PTA

NATIONAL PTA DUES PROVIDE:

- Membership in the country's largest child advocacy association
- National officers and board members to provide instruction, leadership training, inspiration and support to state and Local PTA leaders
- Field service representatives for each state PTA
- *Our Children* magazine, which contains current programs, issues, projects and bilingual, reproducible sections
- Reflections program
- E-learning courses including PTA Basics, Planning, Ethical Leadership, Conflict Management, Preventing Theft, Parliamentary Procedure, and several more
- Professional staff in the Alexandria, VA, national headquarters
- Website and electronic newsletters
- Representation and a "voice" in Washington D.C. with legislators and administrators
- Legislative email alerts regarding proposed federal bills and new laws affecting children's education and safety
- Resources and networking opportunities for parents and PTA leaders
- Discounts and special offers from partner businesses for PTA members
- Resources for successfully operating your PTA

SUGGESTIONS FOR A SUCCESSFUL MEMBERSHIP CAMPAIGN

At Your Campus

- Invite EVERYONE in your community to join. Customize "invitations" for specific groups: men, ethnic minorities, non-English speakers, high school/adult siblings, single parents, extended family members, and those not aware of PTA.
- Receive the principal's permission to send PTA information home with students. Examples:

letter and membership form, membership dues envelopes, recruiting fliers, surveys

- Publicize accomplishments and future goals.
- Use PTA and school newsletters, websites, email lists, fliers, posters, bulletin boards, marquees, and signs.
- Create a "Brag Board" with pictures and information about accomplishments, current goals, member benefits, pictures of members participating in events and programs, etc. Display at every PTA and school event along with membership forms to join.
- Make as many personal contacts as possible. Ask all members to help recruit faculty, staff, community members, business members, friends, relatives, and anyone concerned about children.
- Leave membership information in the school office for new families as they enroll.
- Hold a contest to see who can recruit the most PTA members from each class.
- Use the annual Texas PTA membership theme provided or adapt it to best fit your PTA.

In Your Community

- Send a letter to owners of local businesses and leaders of local organizations inviting them to join. See the Appendix of this guide for a sample letter.
- Develop relationships with community groups, businesses, churches, newspapers and radio stations. Find business and commercial locations willing to display your PTA's information and to promote PTA among their employees/members.
- Request to display information at local community centers, libraries, businesses, etc.
- Ask the chamber of commerce to promote PTA in their newsletters and meetings.
- Include PTA materials in packets that local hospitals give to new parents.
- Ask a well-known local personality to serve as honorary membership chair.
- Set up a Reflections display at the local library or shopping mall.

RECRUIT (CONT.)

RECRUITING MEN

Men have held important roles in PTA throughout its long history. President Theodore Roosevelt sat on the board of directors of the National Congress of Mothers (predecessor of the National PTA). Men have served at all levels of PTA and have proved to be some of its best volunteers and spokespersons. Chuck Saylor was the first male president for National PTA, 2009-2011.

Men are directly involved in the care and education of children. It is vital that PTA welcomes and includes men through programs and activities addressing their needs and concerns.

- Promote male engagement in all communications from PTA.
- Include fathers, step-fathers, grandfathers, uncles, and older brothers; all men that play a significant role in the lives of your students.
- Seek out male leaders for leadership positions.
- Host father events, clearly stating when publicizing that children can bring a father-substitute, such as a grandfather, uncle, or close family friend.
- Ask men who are members of service clubs, religious or community organizations to serve as liaisons between the PTA and their specific group. Consider joint projects.
- Provide activities that use their talents and experiences such as career day or vocational activities.
- Sponsor an orientation for fathers at the beginning of the year with a speaker and offer ways to become involved in their child's education.
- Review special male engagement programs at the Texas and National PTA websites.

RECRUITING SPECIAL GROUPS

- Make sure all families feel welcome.
- Organize field trips, arts and craft shows, sports events and food experience days as well. (Food experience days are events where children and parents cook a meal together with ingredients provided by PTA or contributed by members or area businesses.)

- Request ethnic leaders to assist in customizing materials to best reach a group.
- Create a friendly climate. Choose activities that appeal to different groups.
- Translate information to ensure all audiences are reached with your message.
- Survey community to determine areas of interest for programs, etc.
- 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.
- 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.

For more recruiting ideas see www.txpta.org.

RECORD

MEMBERSHIP ROSTERS

- As memberships are received, make a complete list of names and contact information.
- The membership roster should note the type of member for each person: regular, faculty, student, community and life member. (List only those Texas PTA Honorary Life Members who have selected your PTA to be exempt from paying state dues this year)
- Prepare at least four copies of each membership list:
 - One copy to be forwarded to the Texas PTA Office
 - One copy for the treasurer's files
 - One copy the secretary must keep with the minutes book to check membership when requested
 - One copy to be kept in the membership committee file

MEMBERSHIP TYPE

Membership categories include regular members (R), Faculty members (F), Student members (S), community members (C) and designate if the member is a Texas PTA Honorary Life member. Regular members include family members of students. Community members include members that are non-campus affiliated.

Remember, PTA membership lists are not released to non-members or outside interests by Texas PTA, Council or Local PTAs.

REPORT & REMIT

REPORTING MEMBERSHIP TO TEXAS PTA

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

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

- Submit names and dues to Texas PTA by the 15th of each month. State and national membership dues are funds are held in “escrow” by the Local PTA and are owed to Texas PTA and National PTA.
- Complete the membership roster, listing only the names of new members for which you are submitting dues. Members who have already been reported to Texas PTA should not be included on subsequent reports and rosters.
- Retain the Texas and National portions of dues in escrow until distribution to Texas PTA. The Local PTA treasurer reports the National and Texas PTA portions of dues separate from the funds belonging to the Local PTA.
- Forward the member roster and dues report form to the Texas PTA Office with a check for \$4.50 dues per regular member and \$2.25 dues per Texas Honorary Life Member.

REPORTING DATES

The reporting dates below are used to determine “active” status and good standing as well as eligibility for awards and participation in Texas PTA and National PTA programs.

- September 30 – reported membership of a Local PTA on this date determines eligibility for the Texas PTA Early Bird Membership Award.
- October 15 – reported membership of a Local PTA on this date determines eligibility to retain “active” and good standing status, vote at the Texas PTA Annual Convention, participate

in the Reflections Program, and for fall membership awards and achievements.

- Local PTAs that have not remitted dues for at least 20 members by October 15 will be sent a letter in November stating that services from National and Texas PTA may be stopped if dues for at least 20 members are not remitted before March 15.
- December 1 – reported membership of a Local PTA on this date determines the number of voting credential cards eligible to PTAs for Texas PTA’s Annual Meeting. PTAs that submitted dues for at least twenty members by October 15 are eligible for one card for the president and one card for every 50 members or a fraction, based on membership totals as of this date.
- March 15 – reported membership of a Local PTA postmarked by this date determines the eligibility for spring membership awards and achievements. Texas PTA’s membership total as of March 15 determines the number of eligible voting delegates at the National PTA Annual Convention.
 - Spring membership dues must be postmarked by March 15 to be credited to the current school year. PTAs that have not paid dues for a minimum of 20 members for the entire school year by March 15 will be sent a letter stating that services from National and Texas PTA will be stopped until dues for at least 20 members for that Local PTA are received by the Texas PTA Office. Texas PTA notifies the Internal Revenue Service to remove the Local PTA from affiliation with Texas PTA’s group exemption number if dues are not received from that Local PTA for two consecutive school years.

RETAIN

MEMBERSHIP CARDS

National PTA provides membership cards to Texas PTA, which in turn distributes cards to all Local PTAs in good standing. The cards are unique each year. Local PTAs obtain cards from the Texas PTA Office.

- Distribution to Local PTA – Texas PTA distributes membership cards to Local PTAs in the summer based on the number of members that Local PTA had in the previous membership year. To receive cards, Local PTAs must have paid dues the previous year and have a president's name and contact information on file with the Texas PTA Office.
- Additional Cards – A Local PTA may request additional cards after a PTA has submitted dues and a roster for at least 90% of the number of cards received during the summer.
- Replacement Cards – Care should be taken when handling and printing cards. If necessary, replacement cards can be purchased from the Texas PTA Office.
- Excess Cards – If a PTA has more membership cards than needed for the year, they should return the cards to Texas PTA.
- Distribution to Members – Issue a membership card for each person enrolling upon payment of dues. Remind each member to sign the front of their card.
- Effective Date of Card – Membership cards are valid for the membership year indicated on the card. The membership year is August 1 through July 31. Dues paid after March 15 confers membership for the remainder of the current membership year and the following membership year.
- Voting Rights – Membership cards are used to prove membership in order to vote at meetings at the Local, Texas, and National PTA levels. Cards must be presented, with matching credentials, by members registering as voting delegates at National and Texas PTA annual meetings.

WELCOME NEW MEMBERS

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

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

Here are ways to make sure new members feel welcome:

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

UNLESS YOU ASK, YOU'LL NEVER KNOW

Before you write off those who haven't renewed, discover why. A personal visit or phone call is preferable, but a letter or email will sometimes work. Be sure to mention the accomplishments of your PTA and the benefits the member gains through their membership.

RECOGNIZE

RECOGNIZE OUTSTANDING MEMBERS

It is very important to recognize the work your members do for your PTA. This can be as simple as mentioning their names in the newsletter or at meetings. Many PTAs host a special event to recognize all their volunteers once or twice a year.

Special recognitions are available from Texas PTA and National PTA for outstanding volunteers. The ideal time for presenting the following awards is in February when we celebrate Founder's Day and the formation of PTA on February 17, 1897.

TEXAS PTA HONORARY LIFE MEMBERSHIP

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

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

NOTE: Texas PTA life members are exempt from paying the Texas PTA portion of dues for only one Local PTA per membership year unless they have received more than one Honorary Life Membership. In that case, they may register as a Texas PTA life member with as many Local PTAs as they have Texas PTA life memberships.

When remitting National and Texas PTA portions of dues to the Texas PTA Office, list only those life members who have paid the national and Local PTA dues portions for the current membership year. Do not list each life membership awarded by the Local PTA.

Texas PTA reserves the right to revoke the Texas PTA life membership of any member who has been convicted of a felony. The member will be notified by mail and asked to return the life membership certificate, card and pin to the Texas PTA.

TEXAS PTA EXTENDED SERVICE AWARD

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

NATIONAL PTA LIFE ACHIEVEMENT AWARD

This award is the highest honor from the nation's largest child advocacy association to the person who daily lives out his or her commitment to children. The \$125 fee for presenting the Life Achievement Award supports the National PTA Endowment Fund and helps ensure the longevity of the association. Your honoree need not be a PTA member to receive the award. Go to www.pta.org or call 1-800-307-4PTA.

National PTA life members enrolling in a PTA are not exempt from payment of National, Texas, or Local PTA dues. If they are both a National and Texas PTA life member, they should enroll as a Texas PTA life member.

PROCEDURE BOOK

A procedure book serves as a permanent record of activities and ensures an ongoing PTA program of work. A three-ring binder with tabbed dividers keeps your records organized. It should contain material and information needed for the job. Ask yourself, “If I knew nothing about the job, could I do it with this Procedure Book?”

SUGGESTED CONTENTS:

DIRECTORY

- Local PTA Fact Sheet
- Your name, address, phone number and term of office
- Rosters of National, Texas, Council and Local PTA boards
- Names and phone numbers of resources used

JOB DESCRIPTION

- Responsibilities of your job
- Month by month calendar and “To Do” List

PLAN OF WORK

Copy of your approved Plan of Work

BUDGET

- Local PTA budget
- Treasurer’s reports
- Voucher forms
- Tax exempt forms
- In-depth breakdown of expenditures for your job (can be put with your Plan of Work)

BYLAWS AND STANDING RULES

A current copy of the Local PTA bylaws and standing rules

EVENTS, PROJECTS, PROGRAMS

List on a separate page each event, project or program (include dates, responsibilities, expenses, evaluations, recommendations)

REPORTS

- A copy of all forms turned into the National, State, Council or Local PTA.

- Award forms
- Annual report: A summary of year’s activities that should not exceed one page (include your recommendations).

VOLUNTEER HOURS

Use a calendar to keep track of your hours and turn them into the Volunteer Chairman (if recorded within your PTA or school district).

PTA MATERIALS

- Handouts and updates received from Texas, Council and Local PTAs
- Agendas and minutes

NEWSLETTERS

PAST YEAR’S SUMMARY

Below is information to pass to the next chairman. Use electronic files for ease of transition and paper saving.

- Plan of Work and budget
- Actual amount of money spent doing your job
- List of past, current and future resources (Don’t forget the most important resource: YOU)
- Copy of all reports
- Handouts – include the number of copies made, who they went to and supplies used
- Activity Summary – be specific and give details (who, what, when, where, how)
- Include sample notes, maps and diagrams used.
- Month by month “To Do” list
- Estimate the number of hours you spent on the job

RECOMMENDATIONS

Provide any recommendations for the future

PTSAs

PUT AN “S” IN YOUR PTA

There is much to be gained by including students in PTA. In high schools, many PTAs prefer to organize as a “Parent-Teacher-Student Association.”

Parent-Teacher-Student Associations (PTSAs) are usually organized at the high school level and may have students serving on the board. However, any PTA may have student members.

PTSAs ensure that all students are represented.

PTSA members can help promote all extra-curricular groups and ensure that families, educators, students and the community have a way to come together.

WHAT ARE THE BENEFITS?

- Different age groups have the opportunity to provide a wide range of viewpoints for greater understanding.
- Students members can readily express the needs of the school and community.
- Young people have the ability to develop their leadership skills, and adults have support and assistance in their responsibilities.
- Young people help select and plan programs.
- PTA public relations improve because the mass media takes notice when young people become involved in working on their own problems and the needs of their school and community.
- PTSA membership is frequently increased, not only because students join, but also because more parents are willing to take an active part when their young people are interested and involved.
- Youth participation improves human relations. As adults and young people work together on committees and projects, the generation gap narrows, increasing value to family life, the school system and the entire community.
- Improved community service (with the added enthusiasm, zest, and energy of active young people) focuses attention on alcohol and drug concerns, job opportunities, smoking, health, AIDS, alcohol abuse, environmental problems, learning disabilities, and education needs.

ASSISTANCE FOR SECONDARY SCHOOLS

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

EARLY CHILDHOOD

THE EARLY CHILDHOOD PTA

Early childhood PTAs are specially designed for parents of preschool-aged children and for all individuals concerned with the growth and development of young children.

The early years of a child's life are an important foundation. Proper development during early childhood (or lack thereof) will have a direct impact on a child's future ability to succeed in school and throughout adult life. Early childhood PTAs provide resources and networking and support for parents, educators and caregivers of young children during these crucial years.

Through early childhood PTAs, parents learn about the local schools. Parents can also develop an early network with other organizations and community agencies that are working for the welfare of children and youth.

Future PTA participation and leadership are developed by the participation of young parents in early childhood PTAs.

THE EARLY CHILDHOOD PTA DIFFERENCE

Early childhood PTAs must address member recruitment differently. Usually, no children's backpacks are available to stuff with a membership envelope, and no captive audience of parents is just waiting to join. Potential members are reached by word of mouth, advertising or publicity materials placed in strategic locations where parents with young children gather. An early childhood PTA may be neighborhood, community or campus-based.

MEMBERSHIP

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

- Distribute new member packets containing fact sheets about the membership, parent education

opportunities, newsletters, and activities in which your PTA is involved and a brochure about your group to every visitor. Be sure to include materials about how to join your PTA.

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

EARLY CHILDHOOD PROGRAMS

Parent education programs offer a unique opportunity for parents to come together not only for social reasons, but also to learn more about child development and ways to help their children grow to their full potential. Early childhood PTA allows parents to feel empowered to speak up for their children's educational needs. The parent education programs your PTA offers are a great recruitment tool. The following are some program ideas.

- Nutrition
- Child Development
- Safety

EARLY CHILDHOOD (CONT.)

- Learning Disabilities
- Television and Its Influence
- Kindergarten Readiness
- Building a Child's Self Esteem
- First Aid/CPR
- Planning and Saving for College
- Internet Use/Abuse
- Arts/Music (Be sure to participate PTA's Reflections program.)

Promote the activities your early childhood PTA offers as a benefit of membership to the group. Organize special interest groups such as play groups, babysitting co-op and a supper club. Publicize events to the community.

Community service demonstrates the PTA's service orientation. Make sure your local paper reports your PTA's service projects, events and programs.

STAR SPANGLED PTA

Star Spangled PTA is a very special PTA chartered by Texas PTA especially for those persons who maintain an interest, love and concern for the youth of Texas and for Texas PTA, even though they may have no contact with a Local PTA. An annual meeting is held at the Texas PTA Annual Meeting. Membership is open to everyone and may be obtained through the Texas PTA website. Membership in Star Spangled PTA costs \$11.50.

•Appendix

Calendar	23-25
Sample Plan of Work	26
Plan of Work.....	27
Sample Letter Inviting Individuals to Join PTA	28
Sample Letter to Businesses and Community Leaders.....	29

CALENDAR

JUNE

- Review materials from the outgoing chair, including Plan of Work and procedure book.
- Read membership materials provided by National and Texas PTA
- Verify that Texas PTA has the current officer contact information. Membership cards will not be provided until this is on file.

JULY

- Attend membership workshops at Texas PTA Summer Leadership Seminar.
- Develop a membership campaign using the Texas PTA annual theme. Enlist the help of membership committee, board members, principal and staff.
- Organize membership contest; determine incentives.
- Plan to attend all board meetings.
- Prepare Plan of Work. See the Appendix of this guide for a sample of a completed Plan of Work. Blank forms are available for purchase in the Forms Packet or for download at the Texas PTA website.
- Gather materials for membership enrollment (i.e., envelopes, current dues report, current roster and current awards form).
- Review all Texas PTA awards applications and make appropriate plans for eligibility.
- Ask president for membership cards that Texas PTA Office distributes.

AUGUST

- Submit Plan of Work for approval by board.
- Implement membership enrollment campaign.
- Ask principal for permission to distribute materials through school channels.
- Have your campaign materials ready for any pre-start events and the first day of school.
- Inform teachers and staff on how and when dues will be collected.
- Publicize! Use all media – newsletters, newspapers, billboards, radio/TV, and the PTA

and school websites to publicize your theme and goals. After permission from principal, publicize theme by displaying posters in halls. See the Appendix of this guide for a sample press release. Complete information on public relations and the media is provided in the Texas PTA Communications Resource Guide, available for purchase or download at the Texas PTA website.

- Have enrollment tables in each homeroom and/or main hallway on the first day of school.
- Plan to have a membership table and plenty of help at first PTA meeting.
- Use posters, photos, Brag Boards and artwork to draw attention to membership campaign progress.
- Work with program chair to host a parent education program.
- Prepare a packet for the school office to distribute when new students enroll.

SEPTEMBER

- September is “PTA Family Engagement Month.” Publicize the Governor’s Proclamation – Texas PTA Enrollment Month.
- Seek support from local officials, such as the mayor, judges, or superintendents to announce PTA Family Engagement Month
- Solicit support of faculty and room representatives to promote membership.
- Set up membership tables at Open House and the first PTA meeting.
- Continue to publicize membership in PTA all the time.
- Update membership in newsletter and at meeting on progress toward goals. Make certain to coordinate this message with other board members.
- Submit membership dues, membership lists, and dues report to TEXAS PA by the 15th. Texas PTA membership is not in effect until dues are received by Texas PTA.
- Early Bird Award— earned by submitting at least 75% of last year’s membership total to the

CALENDAR (CONT.)

- Texas PTA Office, postmarked by September 30.
- Review eligibility for other membership awards listed on the Texas PTA website, membership section.

OCTOBER

- Submit membership dues, membership rosters, dues report form and awards application forms to the Texas PTA Office, postmarked no later than October 15.
Note: This step is required in order to be eligible for membership awards, credential cards for voting at the Texas PTA Annual Convention and participation in the Reflections Program.
- Organize fall campaign materials for outstanding membership campaign award application and update procedure book.

NOVEMBER

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

DECEMBER

Relax and enjoy the holidays.

JANUARY

- Kick off spring campaign.
- Continue to recruit new members and try to engage those who didn't rejoin.
- Evaluate progress and plan new approaches.

FEBRUARY

- Celebrate PTA's birthday month.
- Honor someone with an Honorary Texas PTA Life Membership or National Life Achievement Award.
- Attend Founder's Day Event scheduled in your community.

- Attend Texas PTA Family Engagement Conference (even-numbered years only).
- Begin preparing procedure book for the next committee chair. Collect and sort records of membership activities and copies of all recruiting materials used during the year.

MARCH

- Submit final membership dues report, roster and dues to the Texas PTA Office by March 15. (Dues paid after March 15 result in membership for the remainder of the current year and next membership year.)
- Prepare outstanding membership campaign application found online, and submit to Texas PTA by required deadline.

APRIL

- Evaluate the year's progress, make written recommendations for next year and complete procedure book.
- Plan recruiting ideas for spring pre-registration.
- Attend the Officer and Chair Trainings where available.
- Make plans to attend Texas PTA Summer Leadership Seminar.

MAY

- Meet with successor and pass on procedure book and other records at end of school year.
- Research the annual Texas PTA membership theme and recruiting resources for next year.
- Ask for faculty input about contests or other incentives. This step is crucial to keep the goodwill of all faculty and staff.
- Meet with new president to brainstorm strategies and set goals.
- Recruit a committee.
- Celebrate success!!!
- Breathe a sign of relief and wish the new committee well.

CALENDAR (CONT.)

ALL THE TIME

- Continue to publicize PTA and update members on goal progress.
- Enroll everyone – mothers, fathers, teachers, students (9th grade or older), school employees, bus drivers, grandparents, friends, school board members, community leaders, business people, and babysitters.
- Request additional membership cards from the Texas PTA Office as needed.
- Inform members of progress toward goals.
- Be sure a membership table is on hand for all PTA meetings and activities.

PLAN OF WORK (Plan de Trabajo)

Officer/Chairman Name:

(Nombre de Oficial/Presidente de Junta)

Position:

(Posición)

Year:

(Año)

Reproduce as needed for the appropriate number of goals.

(Se puede reproducir para metas adicionales.)

Responsibilities/- Duties: (Responsabilidades)		Committee Members: (Miembros del Comité)	
Goal: (Meta)		Evaluation Process: (Proceso de Evaluación)	

<i>Specific Action Steps</i> (Proceso Especifico de Acción)	<i>Start Date</i> (Fecha de Empiezo)	<i>Completion Date</i> (Fecha de Terminación)	<i>Budget</i> (Presupuesto)

Resources: (Recursos)	
---------------------------------	--

SAMPLE LETTER/NEWSLETTER ARTICLE INVITING INDIVIDUALS TO JOIN PTA

Date

Dear (individualize letters if possible):

Partnerships between parents, educators and children enhance children's success. We know that children learn more and have better lives when everyone in the school community works together to share thoughts and information and work on projects to benefit children. The (Local PTA) hosts programs that benefit the children at our school. Last year some of the programs included:

- Use bullet points to list programs and how they benefitted children

For this school year we are planning:

- List some of the planned programs and projects

By becoming a member of (Local PTA), you can become an important part of helping to ensure that these plans become a reality. We also welcome your new ideas for the benefit of our children.

Members of the (Local PTA) receive:

- List benefits from Local PTA - newsletter, website access, directory, discounts at local businesses; State and National PTAs– access to websites, legislative news, discounts

Please join with us to make a difference in the education, health, and welfare of our children. Complete the attached (envelope, form, etc.) and return it with your dues payment to (membership chairman or president).

If you'd like any additional information about the (Local PTA), please feel free to contact:

(Name of Membership Chairman)

Contact information

OR

(Name of PTA President)

contact information

We look forward to having YOU as a member!

This letter is easily altered to become an article in your PTA's newsletter or on your website. It is important to list specific programs and how they benefit students at your school. This is also a wonderful place to attach a survey asking what members would like to see their PTA do and what projects they would be interested in helping with (give ideas of time commitments required for projects).

Written 06/08

Sample Letter to Business/Community Leader

Date

Name

Address

City, State Zip

Dear *(Each letter should be personalized, if possible),*

As a member of the business community, you are well aware that the education and health of our future workforce is important. PTA provides a vital link in bringing the home, school and community together in addressing child-related concerns. PTA is an organization dedicated to the education, health, safety, and well being of children and youth.

In the coming year, our Local PTA will conduct the following programs: *(use bullets to list programs that would encourage business participation, such as offering students a chance to learn how to run a business).*

We invite you to become a member of _____ PTA. By joining, you also become a member of Texas PTA and National PTA, both of which have done outstanding work in the areas of involving parents in their children's education, teaching television critical viewing skills, reducing school violence, and *(use bullets to list other projects you feel would be important to your business community).*

Your membership entitles you to receive updated information from all levels of the PTA on the concerns and issues facing today's children and youth and, consequently, facing all of us. Your support, provided through your membership, will be acknowledged by *(list types of acknowledgment, such as printing all business members' names in the PTA newsletter or meeting programs or announcing names at a PTA activity).*

For more information or to join, contact *(name and phone number of person to contact).* We look forward to welcoming you as a member soon. The children and youth, and especially our community, thank you.

Sincerely,

(Signature of president)

(Local PTA Name) President

CALENDAR

June	National PTA Convention
July	Summer Leadership Seminar
July	Texas PTA Annual Convention held in conjunction with Summer Leadership Seminar (odd-numbered years)
May 31/June 30/July 31	Fiscal year ends; all financial activity ceases and financial records are transferred to the Financial Reconciliation Committee once bank statement is reconciled
August	State ceremony for awarded Reflections and One World Challenge entries
September	Texas PTA Connection Day
September 1	Fall deadline for submission of proposed legislative positions and resolutions to Texas PTA
September 30	Early-bird membership reporting date
October 15	“Active” status membership reporting date
Oct 15/Nov 15/Dec 15	Form 990 return due to IRS (4½ months after fiscal year ends)
November	Emerging Leaders Academy application deadline (online only)
December 1	Membership increase reporting date
December 1	Texas PTA student and faculty scholarship application deadline (online only)
January	Texas Legislative Session begins (odd-numbered years)
January 15	Deadline for advancing Reflections entries to be received by Texas PTA
Jan 20/Apr 20/Jul 20/Oct 20	Quarterly sales tax reports due to Texas State Comptroller
January 20	Annual sales tax report due to Texas State Comptroller
February	Rally Day at the Capitol (odd-numbered years)
February	Texas PTA Family Engagement Conference and Annual Convention (even-numbered years)
March 15	Spring award membership reporting date
March 31	Deadline for advancing One World Challenge entries to Texas PTA
April 30	Spring deadline for submission of proposed legislative positions and resolutions to Texas PTA
May 1	Report newly-elected officers to Texas PTA via the Local Officer Information Form
May 15	Local and Council PTA awards submissions deadline (online only)
May 31	Texas Legislative Session ends (odd-numbered years)

CONTACTS

NATIONAL PTA

1250 N. Pitt Street
Alexandria, Virginia 22314
Phone: 1-800-307-4PTA
Fax: (703) 836-0942
Email: info@pta.org
Website: www.pta.org

TEXAS PTA

7600 Chevy Chase Drive
Building 2, Suite 300
Austin, TX 78752
Phone: 1-800-TALK-PTA
Fax: (512) 332-9326
Email: txpta@txpta.org
Website: www.txpta.org

TEXAS PTA OFFICERS

President

president@txpta.org

President-Elect

presidentelect@txpta.org

Secretary

secretary@txpta.org

Treasurer

treasurer@txpta.org

Vice President Field Service

vpfs@txpta.org

Vice President Leadership

vpl@txpta.org

Vice President Membership

vpm@txpta.org

Vice President Programs & Resources

vppr@txpta.org

TEXAS PTA DIRECTORS-AT-LARGE

Pierr Castillo

pcastillo@txpta.org

Frances Fass

ffass@txpta.org

Lee Guerra

lguerra@txpta.org

Fred Henley, J.D.

fhenley@txpta.org

Dr. Sylvia Reyna

sreyna@txpta.org

Neil Shelby

nshelby@txpta.org

Dr. Greg Smith

gsmith@txpta.org

Membership Chair

membershipchair@txpta.org

Parent Education Programming Chair

parenteducationprogrammingchair@txpta.org

TEXAS PTA STATE OFFICE DEPARTMENTS

Communications

communications@txpta.org

Finance

accounting@txpta.org

Member Services

membership@txpta.org

Programs and Resource Development

programs@txpta.org

RESOURCES

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

FOUNDATIONS

FOUNDATIONS courses provide a broad overview of “what” PTA is, and share important information that every PTA leader should know. In addition to the courses offered for all board members, Texas PTA has also created a series of brief *FOUNDATIONS* courses that provide general information for many Local PTA board positions. It is important to note that these position-specific courses are not meant to be comprehensive training, rather a quick review of each position for newly-elected or prospective nominees. Other than *FOUNDATIONS: Leader Orientation*, all *FOUNDATIONS* courses are web-based presentations and will debut in Summer 2013.

ALL BOARD MEMBERS

- Council PTA Board Orientation
- Inclusiveness
- Leader Orientation
- Local PTA Board Orientation

POSITION SPECIFIC

- Arts in Education
- Communications
- Environmental Awareness
- Fundraising
- Healthy Lifestyles
- Historian
- Legislative Action
- Membership
- Parent Education Programs
- Parliamentarian
- President
- Secretary
- Treasurer
- Volunteer Coordinator

BASICS

The *BASICS* series contains detailed information to support volunteer leaders in their specific board position. Texas PTA strongly encourages every board member to attend a *BASICS* course for their own position, as well as any other related positions.

BASICS courses are currently available for face-to-face presentations during Summer Leadership Seminar and through your Council PTA or Area PTA, as well as scheduled web-based trainings hosted by Texas PTA. In addition to the training presentation, all *BASICS* courses have a companion Resource Guide and Quick Start Guide. These guides are available for free download from the Texas PTA website or for purchase through Texas PTA’s online store. Courses marked with an asterisk (*) will debut in Summer 2013.

- Arts Education*
- Communications*
- Environmental Awareness*
- Fundraising*
- Healthy Lifestyles*
- Legislative Action
- Membership
- Parent Education / Programs
- Parliamentarian
- President
- Secretary
- Treasurer
- Volunteer Coordinator*

SPOTLIGHTS

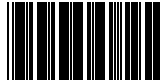
PTAs have many unique programs, processes and responsibilities as healthy, thriving non-profits. *SPOTLIGHTS* courses offer an in-depth review of some of these most important and recurring PTA functions.

SPOTLIGHTS courses are available during Summer Leadership Seminar and through on-demand, web-based presentations hosted by Texas PTA. Courses marked with an asterisk (*) will debut in Summer 2013.

- Bylaws and Standing Rules*
- Conducting a Meeting
- Financial Reconciliation*
- Nominations and Elections

L
L6308
Membership Resource Guide

\$7.50



334



Texas PTA
txpta.org | 1-800-TALK-PTA
Revised June 2014. This item is for PTA use only.