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Membership At-A-Glance

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

Monthly

- Report new memberships online at www.oregonpta.org. See instructions later in this chapter.
- Turn membership fees and remittance form (invoice) over to your PTA treasurer.
- Give an updated copy of the membership list to your PTA secretary.
- Balance your records with the treasurer and remind him/her to send fees and remittance forms to Oregon PTA by the last day of each month.
- Make certain every paid member receives a PTA membership card in a timely manner.
- Present a report at every meeting.

July and August

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

September and October

- Offer membership opportunities at every school, PTA, and community event.
- Advertise membership through PTA, school, and community newsletters, community reader boards, school web site, social media, etc.
- Provide membership information for new families through the school office.
- Invite local business members to join.

- Gather membership dues from everyone.

November, December, and January

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

February, March, and April

- Celebrate Founders' Day on February 17th.
- Register for and attend OPTA Annual Conference and Convention to receive Membership Awards.
- Identify a membership chair for next year.
- Visit your district office and ask all school board members to join your PTA.
- Host a parent-involvement table at parent-teacher conference –ask everyone to join your PTA.
- Gather membership dues from everyone.
- Assist the volunteer coordinator with year-end recognition of parent involvement.
- Plan a celebration for teachers and staff members for Teacher Appreciation Week (first week of May).

May and June

- Go for those final details of your membership goals. You can do it!
- Prepare membership materials for parents of incoming students during registration times.
- Gather membership dues from everyone.
- Update your procedure book with an evaluation of this year's plan and suggestions for next year.
- Thank your committee members for their hard work.

- Organize your membership materials for next year.
- Participate in year-end planning for the new school year.

The Importance of Membership

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

The Role of the Membership Chair/Committee

As the membership chair you are acting as a guide to those who are eager to learn about and become involved with your PTA. The membership committee and its chair are responsible for promoting and increasing PTA membership and giving everyone in the community an opportunity to participate in this organization. It is up to you to educate all those around you about the purposes and objectives of PTA. In order for you to educate others, you must first learn and understand these purposes and objectives. If your unit does not have a Membership Chair/Committee, the duties of the Membership Chair/Committee should be delegated to a specific volunteer/officer.

PTA

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

Today, the work of National PTA is carried on through its more than 4 million members, in 27,000 PTA/PTSAs, located in 54 congresses, including all 50 states, the District of Columbia, European, Pacific, Puerto Rico, and US Virgin Islands.

PTA is the largest non-profit volunteer organization in the world whose sole concern is the health, education, and welfare of all children and youth.

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

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

For a full list of advantages to belonging to the PTA organization and the full history of PTA see Chapter 1 of this guide.

Purpose of the Membership Committee

When membership committee members encourage others to join PTA, they should concentrate on creating interest and enthusiasm, and promoting involvement. Explain why it is so important to be a part of this national association. Include information about the Mission and Purposes of PTA, the potential personal rewards, and the great benefits the children and youth of your school and community receive from your local PTA/PTSA unit.

A successful membership campaign seeks the involvement of all the members of the community. Potential members include: parents, children, educational personnel, senior citizens, professional people, grandparents. Remember to include people who are already dedicated to PTA; people who are peripherally involved with PTA; and people who are, as yet, unaware of the efforts PTA is making on behalf of the children and youth of their community, their state, and their nation. For additional explanation of any of the material in this section, please contact the Oregon PTA Vice President for Membership.

PTA Unit Membership Obligations

- When referring to "PTA" in print, do NOT use periods to separate the letters. "PTA" should be referred to in capital letters at all times.
- Membership drives are a year-long process, not a one-time activity.
- Since each local PTA/PTSA unit functions individually, members must join and pay membership dues to each individual local PTA/PTSA unit in which they wish to have voting rights.

Membership Chair/Committee Duties

- The Membership chair should be knowledgeable and enthusiastic about PTA

- Obtain and study records of membership and the procedure book from last year's chair if possible.
- Utilize National PTA Online Resources and Programs focused on Membership
- Organize your membership committee as soon as possible. Involve as many people as you can. Committee plans need to be approved by the executive committee/board of the local units prior to implementation.
- Your primary responsibility is to enroll as many members as possible. Therefore, aim your "campaign" at the entire community. Enroll parents, teachers, principals, staff, and students at your school. Expand your membership to the community by enrolling grandparents and other relatives, neighbors, individuals from business, school board, and city council members.
- Study the results of the previous years' membership committee's plans and set your goals (e.g., a percentage or flat number increase over last year's total members).
- Attend leadership training to obtain membership materials. (If you are unable to attend, your president may pick up the membership materials in your place. Be sure to get these materials as soon as possible.)
- Collect membership dues for each individual who wants to join your PTA. Since each local unit functions individually, members must join and pay membership dues to each local unit in which they wish to have voting rights.
- Make certain ALL membership information is filled out completely, including name, address, phone number, and email for every member. Avoid the use of school information if at all possible. Oregon PTA communication with members is generally via email, so an email for every member is very important. We do not share emails outside of PTA. (Membership benefits include services to every PTA member!)
- Report membership online at www.oregonpta.org.
- Communicate regularly with your local unit executive committee/board.
- Turn membership fees and remittance forms over to the treasurer, who must remit dues by the end of each month.
- Make sure the secretary has a current membership list at all times.
- Issue a membership card for each individual member who has paid dues. Per Oregon PTA By-laws, there are no family memberships. Business memberships must be issued to an individual.
- Update your procedure book as needed.

Membership Procedure Book

A procedure book is a compilation of all the information and material necessary for the effective functioning of an office or committee and should contain resources and a history of the activities

of a particular office/committee. It encourages continuity of work and provides a firm foundation for the future.

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

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

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

Membership Awards

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

- Membership awards recognize an increase in membership totals, meeting membership goals, and/or deadlines, and outstanding membership efforts. Awards criteria identify specific areas for membership committees to work toward.

- The complete list of the membership awards is available in the Awards section of this guide.
- Some membership awards need to be applied for and some are given automatically to units who meet the requirement. Awards applications are available in the Forms section of this guide.
- Membership awards are presented at the annual Oregon PTA Conference and Convention in April.

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

Membership in the Oregon Honorary PTA Unit

The Oregon Honorary PTA Unit is the honorary statewide unit for individuals who wish to affiliate themselves with Oregon PTA but may not have an association with a local unit. Honorary memberships begin at \$25 per individual. This is an excellent idea for your business or community members. An application is available on the Oregon PTA website at oregonpta.org.

Membership Committee

Remember to involve parents, staff, local business owners, and community members in your membership committee and once formed meet to discuss the following and assign tasks to committee members.

Identify marketing tools

- Personal contacts
- Newsletters, hand-outs, or flyers
- Bulletin board notices
- School web-site or reader boards
- Social media

Set goals

- Evaluate past records
- Review your membership goal from Oregon PTA

Plan

- Make joining PTA easy and rewarding
- Create a plan to involve many people
- Find a professional willing to work with other businesses; children and youth are a part of your community, not just your school
- Emphasize membership privileges
- Provide a visual effect that tracks the progress of your goal(s)

Contact and invite everyone

- Utilize your marketing tools
- Send a letter to last year's members
- Target specific groups of individuals who are prospective PTA members
- Include contact information on everything you send out

Report membership

- Remit fees and forms to the Oregon PTA office by last day of each month
- Report membership at PTA meetings
- Highlight new members in a PTA newsletter

Evaluate

- Review goals and status monthly
- Update campaign strategies
- Acknowledge your accomplishments by applying for awards
- If you are not meeting your goals, reevaluate and try something new
- Make recommendations for next year
 - Keep a record of how and what you did to share with the next committee
 - Identify your successes as well as the things you would do differently
 - Share ideas with Oregon PTA's Vice President for Membership
- Celebrate your successes!

Benefits of PTA Membership

Membership in PTA makes you a member of your local unit, Oregon PTA, and National PTA. No other organization devotes its resources and energies so completely to the advocacy of

children and youth. Ninety percent of all dues are used to provide services to members through local units. Services are in the form of information, programs, training, and materials to educate and motivate members, and encourage broad range participation in the interests of every child.

National PTA Provides

- A subscription to each local unit president to the National PTA magazine, *Our Children*.
- The PTA President's Quick Reference Guide available online at www.pta.org. Quick Reference Guides for other key leadership positions are also available.
- Local unit members with weekly e-newsletters: *What's Happening in Washington* and *PTA Parent* (individuals may sign up for these by visiting the National PTA website at www.pta.org).
- Staffing of the National PTA Office in Alexandria, VA for member services.
- Testimony on all federal legislation concerning children and youth.
- Representation in Washington, DC for the 4 million members of the world's largest advocacy group dedicated to the health and well-being of every child.
- National media campaign materials.
- A National PTA convention for the purpose of training and professional development of its members and for conducting its annual business meeting.
- Materials and resources for the Reflections program (cultural arts program available only to PTA/PTSA schools).
- On-line members-only discounts and services through National PTA's award-winning web site: www.pta.org.

Oregon PTA Provides

- Each local unit with non-profit, tax-exempt (501c3) status with the IRS.
- Each local unit with general liability and bonding insurance at low cost.
- Units and individual members with information and online resources at oregonpta.org
- Each local unit president with Mailings/Emails which will include time-sensitive materials intended for distribution to other local unit officers, individual members, and/or the community.
- Each local unit officer with Leadership Training opportunities for a minimal fee.
- Each local unit Reflections chair with training and ideas for a successful program.
- PTA/PTSA school students with the materials to participate in the Reflections program through local, council, state, and national PTA levels.
- Each local unit with Project H.E.L.P. (Hundreds of Exciting Local PTA/PTSA Projects) to help local units with project ideas and implementation.
- Individual members with the opportunity to participate in a bi-annual "Legislative Summit"

and/or “Day at the Capitol” in Salem, for a minimal fee.

- Individual members with current news and information updates including the monthly e-newsletter: onevoice. A valid email addresses entered into the Oregon PTA online membership system is required for this benefit.
- An Oregon PTA annual conference and convention for the purpose of the training and professional development of members and for conducting its annual business meeting.
- An Oregon PTA Board of Directors to coordinate statewide efforts and programs on behalf of its members.
- Staffing of the Oregon PTA office in Portland for members services.
- Representation and participation in meetings of statewide agencies and committees.
- Testimony on state legislation concerning children and youth.
- Tracking of Oregon legislation on child advocacy issues of concern to PTA.
- Oregon students with the ability to apply for Teacher Education Scholarships (TES) funded by individual and local unit donations.

Ideas to Increase Membership

In your building

- Sponsor an “Open House” before school opens in the fall to visit classrooms, meet teachers and staff and invite them to join PTA.
- Host a “New Parents” coffee social for parents of kindergarteners and first graders; offer ideas and suggestions for first-day-trauma and invite them to join your PTA.
- Host an orientation and facility tour for the parents of entry level grades of middle and high schools. Be sure to point out student services and parent-involvement programs.
- Use the energy and enthusiasm of students to recruit other students to membership. If involved and given responsibilities, they will become strong supporters and salespeople.
- Distribute a letter of welcome, along with PTA materials and an invitation to join, through the school office in new student registration packets.
- Host a membership orientation at the beginning of the school year. Highlight what members get for their membership dues and how they can get involved.
- Encourage members to show their membership card at PTA meetings and events for a door prize.
- Set up a resource center in your building with copies of Our Children, onevoice, and your local unit’s newsletters. Let members know how they can subscribe to these publications. Also include PTA brochures (available through the Oregon PTA Office) and membership information.
- Display materials and information on a bulletin board/display area in the school and/or district office.

- Challenge each of your members to recruit one new member during a certain time period; put the names of the recruiter and the new member into a drawing for a donated prize.
- Invite past members and officers to renew their membership every year. Even if they no longer have children attending your school, encourage them to continue to support the work of your PTA.

In your Community

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

Thank Members for Joining

- Mail a personalized letter/note to all members thanking them for joining, inviting them to participate in PTA meetings and encouraging them to get involved at the school and/or in the community (you may want to include a survey sheet and self addressed envelope to learn their areas of expertise).
- Tell members how important they are whether they volunteer at school, home, or not at

all. Every member helps the PTA mission simply by being a member.

- Provide a pen, note pad, or bumper sticker personalized with your local unit name.
- Give PTA/PTSA members special privileges such as: discounts on for-sale items, complimentary admission to a PTA/PTSA event, door-prize drawings, etc.

Frequently Asked Questions

How do I print membership cards?

Printing membership cards is a two step process. First, print membership templates onto business card or a heavy card stock. The template can be found on the Oregon PTA website at www.oregonpta.org under membership, membership chair. Once your templates are printed, enter members in the online membership system, select "print membership cards" and print over the blank templates cards. See the online instructions on the following page.

What is the purpose of a membership card?

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

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

No. Local units operate independently under the association of Oregon PTA therefore, individuals must join each PTA /PTSA unit for which they wish to have voting rights.

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

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

How often do we need to send in membership dues?

Report all new members as soon as possible at www.oregonpta.org. Membership dues should be deposited by the local unit treasurer as soon as possible and the Oregon PTA and National PTA portion (\$9.50/member) remitted to the Oregon PTA office by the last day of each month.

Can students join PTA/PTSA units?

Any student may join a local unit and will receive full voting rights. State and National dues are the same for all members.

Who keeps a copy of the membership list?

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

How long does a membership last?

The PTA membership year runs July 1st through June 30th. However, to allow local units the ability to conduct business over the summer and to start the new school year, memberships do not expire until November 30th of each year.

Entering Membership Online and Printing Membership Cards

Printing template cards

Print cards onto business card template paper (10 per page) or heavy card stock paper that you cut yourself later. The template to print can be found on the Oregon PTA website under membership, membership chair. Once your template cards are printed you will enter your members in the Oregon PTA online membership database (see below) and feed the paper back through, printing over the templates to add member information after entering members.

Entering Member Information Online

- Go to the Oregon PTA web page at www.oregonpta.org.
- Scroll to the bottom of the page and click on Local Unit Leaders Log-in.

- Enter the members-only username (Diversity), and password (Means).
- Click on “Online Membership”.
 - Enter your local unit National I.D. number, membership password, local unit mailing address, and membership contact person and phone number. If you do not know your membership password, contact last year’s unit president or secretary, your region director, or the Oregon PTA Office.
 - Click the “Submit” button.
- The first time you sign in each fiscal year you will be asked the amount of your dues. Input the amount your unit charges for dues (this figure is used to charge members who join your PTA using the Oregon PTA Join Now feature of the web site).
- Enter each new member.
 - Select the type: Parent, Teacher, Staff, Community, Student, etc.
 - Enter the INDIVIDUAL’S full name, phone number, e-mail address, and home mailing address.
 - Click the “Add member” button only once.
 - Repeat the above for each new member.
- Select the “Roster” button.
 - Print a copy for yourself
 - Print a copy for your secretary
 - Print a copy for the Treasurer
- Select the “Remittance Form” button.
 - Always select “New Form”. (The dated forms will be your past entries and are available for your review, for reconciliation, and/or tracking purposes.)
 - Print a copy for your records and one for your treasurer.
- Remit payment, as indicated on the remittance form, to the Oregon PTA office by the last business day of the month.
 - The program calculates the number of members and the amount that should be sent in. The split amounts that print on the bottom of the form are for internal use of Oregon PTA.
- To print the individual information onto your membership card templates you made previously, select “Print Membership Cards” and feed the templates though your printer as you would letterhead.

Reconcile total membership numbers to membership dues remitted at least monthly by clicking on the “Roster” button. Here you will see when each member was entered into your database and on what date the membership dues payment was received. Remember, for local unit award purposes, membership dues payments must be received by the last business day of each month.

Contact your Region Director or the Oregon PTA office with any questions and/or for assistance.