

Membership Kit - Step by Step

*Use this guide to plan the essential steps and activities of a membership campaign.
The blue, underlined items are active links to Communicator articles
on the California State PTA website.*

Understand the importance of Membership

[Twelve Reasons to Be A PTA Member](#)

[Marketing = How to promote PTA and what your PTA offers](#)

[Marketing PTA](#)

[Membership Benefits...You, Students, Your School](#)

[Beneficios de ser miembro de la Asociación de Padres y Maestros](#)

[Six Things to Promote "About PTA" \(pdf\)](#)

[Defining the Difference](#)

[Definiendo la diferencia](#)

Procure Procedure Book & Resources

Start a procedure book if you did not get one from your predecessor

[LIST OF PTA MATERIALS](#)

[PUBLICACIONES DE PTA DISPONIBLES EN ESPAÑOL](#)

[Materials Order Form](#)

[Membership Resources](#)

[Membership Activities Checklist](#)

[Membership Q&A](#)

[Job Description for Membership](#)

[Job Description for Outreach](#)

Understanding Membership Dues

[Where Do Our Membership Dues Go?](#)

[Membership Dues...Are They Tax Deductible?](#)

[Membership Dues: How Much is Enough?](#)

[Cuotas de afiliación – ¿Cuánto es suficiente?](#)

Plan a Membership Campaign

Chairman meets with PTA president and committee

Develop membership recruitment and retention plan

Include outreach to those under-represented

Set goals and set budget, including incentive costs, mailings, etc.

[10 Steps to Membership Success](#)

[Developing a Membership Theme](#)

[Membership ideas and tips](#)

Membership Kit - Step by Step

[Checklist: Your Back-To-School Membership Drive](#)

Develop calendar after contacting council or district regarding due dates

[California State PTA Membership & Award Due Dates](#)

[Membership Development Calendar](#)

Present plans for approval (to PTA Executive Board and Association)

Include Activities, Events and Partnering Ideas with Community

[Activities that Promote Inclusiveness and Diversity](#)

[Partnering Ideas for PTAs](#)

[Ideas para asociación con las PTA](#)

[Program Ideas for PTA](#)

[Ideas para programas de la PTA](#)

Create Invitations

Write invitation letter, announce theme, goals/amount of dues, describe what PTA offers

[Guidelines for a Welcoming & Informative Invitation Letter](#)

[Sample Invitation Letters \(2\) to Families](#)

[PTA Welcome Letter](#)

sample membership forms

envelope (electronic version)

[What's in it for ME?](#)

[¿En qué me beneficia a MÍ?](#)

[What's in it for SCHOOLS?](#)

[¿En qué beneficia a las ESCUELAS?](#)

[What's in it for STUDENTS?](#)

[¿En qué beneficia a los ESTUDIANTES?](#)

[Twelve Reasons to Be A PTA Member](#)

Whom do you invite? everyone!

[The ABCs of Who to Invite to Join PTA](#)

[Teachers R the T in PTA](#)

[Have You Invited the Special People?](#)

[Students! Why should you join your PTA?](#)

[How to Effectively Involve Students](#)

How do you invite?

[Tips for Asking People to Join Your PTA](#)

[Sugerencias para pedir a las personas que se unan a su PTA](#)

[Have Answers When Someone Says No](#)

Use email or mail when appropriate

Membership envelopes are not required but are helpful

Keep invite visible all year - write articles for newsletters, post fliers at school

Have new student packets in the school office

Have PTA table at every PTA and school event

Make personal outreach to last year's members who did not re-join

Membership Kit - Step by Step

Collect envelopes daily and deliver to treasurer or financial secretary
Use PTA financial procedures

Two people count and record money (use [CASH VERIFICATION FORM](#))

Issue Membership Cards - every member deserves a card!

Membership cards are provided at no cost

Do not use “Mr. & Mrs. Smith” or “Smith Family” (each member = one card)

National PTA identification number for your PTA

[Membership Cards Q&A](#)

[Distributing Membership Cards at Secondary Schools](#)

Expiration date is always October 31

Membership Lists should be kept (including contact information)

Update list throughout year and keep for 3 years

Regular report and reconcile with treasurer at meetings

Make sure per capita is forwarded regularly

If needed, request additional cards from your council or district

Continue to publicize your PTA all year long and invite people to join

[Prepare your Mid-year Membership Campaign](#)

[Prepare su campaña de afiliación de medio año](#)

Keep Procedure Book updated

Write final year end report (outline of activities, evaluation and recommendations)

What worked? What did not work? Include recommendations for next year

[End of Term Responsibilities](#)

Pass on all materials to successor

Procedure book and files

Accurate accounting of number of members and dollars collected

Complete membership list