



# Membership Timeline

## **March-June**

*Congratulations on your election or appointment! Here are your first steps as membership chair:*

- Meet with last year's membership chair, and find out what worked, what didn't and why. Plead with him/her to give you the procedure book. If there isn't one, make life easier on your successor, and put one together. Double check your bylaws for the correct dues amount.
- Ask your president-elect to appoint a membership committee to assist you- begin planning now for your summer/fall membership campaign
- Meet with the president-elect and principal to discuss distribution and collection of membership envelopes, membership theme, and awards
- Go to [capta.org](http://capta.org) and take advantage of the many resources and ideas available designed to make your unit membership marketing plan a huge success.

## **July-August**

- Ask your unit president to provide you with the membership materials that are in the State PTA's Summer Mailing. The materials will contain the new membership theme, incentives and awards, and deadlines.
- Ask your unit president to provide you with your council (if in council) and district incentives, awards and deadlines.
- Meet with your membership committee to develop a year-round plan which incorporates the State PTA Membership Incentives/Award as well as your council and district incentives/awards.
- Plan a mid-year "push" and incorporate it into your membership marketing plan. You could consider targeting a historically under-represented group such as students or dads.
- Finalize your plan, including your budget and goals, and present it to the executive board- elect for approval

- Find out who your council or district counterpart is, and make arrangements for delivery or pick up of membership cards and envelopes
- If using hard copy cards, pre-print them using the template at <http://downloads.capta.org/mem/MembershipCardTemplate.docx>
- If using electronic cards, get the template from your district
- Use the new membership marketing flier available at <http://capta.org/pta-leaders/run-your-pta/building-membership/> to create an informational flier about PTA. Or, create your own invitation letter to send home to parents, staff, and community letters. Arrange for printing.
- Attach the PTA membership envelope to your flier- one for each student to bring home

### **August-September-October**

- Your membership campaign begins- send the fliers home in the student's backpacks
- Or, you may send the marketing flyer electronically, with a link to join the PTA, if you have an electronic payment system in place
- With your principal's approval, meet with the teachers, and personally invite them to join PTA. Place the marketing flier with a membership envelope in each teacher's box.
- Make arrangements to collect and count money daily, using PTA financial guidelines
- Report your membership progress to the association and board
- Distribute the cards- one for each member

### **September-October**

- Create a spreadsheet for all members- list each family member separately, as dues must be paid for each person that joins. Be sure to indicate the date that each person joined. Give one copy of the completed spreadsheet to the president and secretary, and update the spreadsheet as new members join.
- Award prizes to the winning classrooms, celebrate your membership!
- Turn-in the council/district/state/national membership per capita through proper channels abiding by council (or district, if out of council) deadlines to qualify for the State PTA "Ready, Set,...Remit" Award. To earn this award your unit must turn-in at least 30 memberships to State PTA by October 30<sup>th</sup>.

### **September-March**

- Invite all teachers and staff members to join PTA. If possible, enlist the support of the principal.
- Kick-off your mid-year membership “push.”

### **September-June**

- Invite all new families to join PTA- create a welcome packet with pertinent PTA information.
- Check with your president/treasurer to be sure that all per capita (dues not belonging to the unit) is sent monthly to the council or district treasurer/ financial secretary.
- Report on membership at all association and executive board meetings.

