



Membership

2020-2021 RESOURCE GUIDE

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Introduction

Welcome, Membership Leaders!

Special Notice: Texas PTA is proud to bring you a refreshed, customizable version of our back the future campaign. Learn more at www.txpta.org/back-the-future!

Because we are a membership association, our voice is only as influential as the number of members who choose to join. That means your role is one of the most critical in all of PTA.

PTA is the largest and oldest nonprofit, volunteer child advocacy association in the country. As the top Membership volunteer, your primary responsibility is to help people in your community understand the value of PTA and WHY they should join PTA.

No other association is committed to making every child's potential a reality by engaging and empowering families and communities to advocate for all children.

- Other groups may focus on certain student or parent groups, PTA focuses on all children.
- Other groups may focus on test scores as a measure of success, PTA focuses on bringing to reality the potential of every child.
- Other groups may focus on making students successful through curriculum and instruction, PTA focuses on making students successful through the engagement and empowerment of parents, families and the community.

Membership Leader Responsibilities

- Know about PTA
- Research the best way to recruit members
- Plan your year
- Recruit members
- Record and Report member information and Remit dues for them
- Celebrate your successes
- Engage members
- Keep records

About PTA

VISION Every child's potential is a reality.

MISSION To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

PURPOSES

- To promote the welfare of children and youth in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth;
- To promote the collaboration and engagement of families and educators in the education of children and youth;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth; and
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

VALUES

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

PTA NATIONAL STANDARDS FOR FAMILY-SCHOOL PARTNERSHIPS

- **Standard 1: Welcoming All Families into the School Community** Families are active participants in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- **Standard 2: Communicating Effectively** Families and school staff engage in regular, two-way, meaningful communication about student learning.
- **Standard 3: Supporting Student Success** Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school, and have regular opportunities to strengthen their knowledge and skills to do so effectively.
- **Standard 4: Speaking Up for Every Child** Families are empowered to be advocates for their own and other children, to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- **Standard 5: Sharing Power** Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- **Standard 6: Collaborating with Community** Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

Getting Started

QUICK START

As soon as you are elected or appointed:

- Register as a PTA Leader at <https://www.txpta.org/submitting-board-member-information>
- Make sure your PTA is listed on www.joinpta.org
- Download the current year membership awards criteria at <https://www.txpta.org/local-and-council-pta-awards>
- Learn about being a PTA Leader.
 - Complete all components of FOUNDATIONS training before October 15 at txpta.org/training.
 - Attend membership related training workshops at Texas PTA events and webinars, as well as those hosted by your Field Service Representative or Council PTA.
 - Watch the National PTA Membership Basics E-Learning Module found on the National PTA website, pta.org.
- Review and be aware of how the PTA Standards of Continuing Affiliation requirements can impact your eligibility to earn membership awards, participate in programs and opportunities provided by Texas and National PTA.
- Contact your predecessor to request previous membership records and other relevant membership information (i.e. Procedure “Book”) to know what has been done in the past. It does not always need to be a book, so it might be a flashdrive, a shared electronic document or box of files.
- Form your Membership Committee!
 - Plan how you will recruit members.
 - Complete a Plan of Work.
 - Plan how you will recognize and celebrate your members.
- Start keeping your Procedure “Book” - traditional or electronic - to provide your successor with everything you and your committee members do throughout the year.
- Follow Texas PTA and National PTA on social media.



Sample Plan of Work

Officer/Chairman

Name: _____

Position: VP/Membership Year: _____

Reproduce as needed for the appropriate number of goals.

Responsibilities/ Duties:	<ul style="list-style-type: none"> Recruit new members Inform community of PTA Purposes, policies and programs to encourage participation Mail dues with membership roster to Texas PTA Maintain accurate records in a procedure book Work closely with treasurer to maintain accurate record 	Committee Members:	List individual names
Goal:	<ul style="list-style-type: none"> Increase total membership from last school year by 20% Recruit at least 10 community members Recruit at least 10 student members 100% Faculty members 	Evaluation Process:	Feedback from community, executive board, and final membership results

Specific Action Steps	Start Date	Completion Date	Budget
Recruit committee members and develop membership recruiting strategy to include: welcome packet for new students, recruiting display at every PTA meeting/event; membership challenge; partner with community, utilize decorate school hallways as allowed	July	Ongoing	\$0
Attend all executive board and regular meetings and provide a report on membership	July	Ongoing	\$0
Promote membership and benefits through newsletter articles, website; marquee, carpool, school events, local media, Facebook	July	Ongoing	\$25 to print brochures; \$24 for 2 boxes for TXPTA dues envelopes
Mail dues received to Texas PTA at least weekly	June	Ongoing	\$25
Distribute membership cards in timely manner	August	Ongoing	

Resources:	Texas PTA BASICS Membership Resource Guide, membership portion of www.txpta.org , National PTA www.pta.org , previous chair's notes, current executive board and committee members, past membership rosters community leaders.
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Quick Information

How much are dues?

- Total dues collected per member is the sum of the following:
 - Local PTA dues = Amount per member according to your PTA's bylaws
 - Texas PTA dues = \$2.25 per member
 - National PTA dues = \$2.25 per member
- Texas and National PTA portion of dues (\$4.50 per member) must be mailed to Texas PTA with the membership roster regularly.

Where do I mail the rosters and dues?

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

Where do I get membership cards?

Texas PTA provides membership cards to Local PTAs once PTA leaders have registered themselves with Texas PTA. The number of cards provided is based on previous year's membership totals.

What is the membership year?

The membership year is August 1 through July 31. Memberships do not carry over from one membership year to another.

If someone wants to join the PTA for the coming school year at a Spring event (i.e. kindergarten round-up, 6th grade or 9th grade orientation, etc.), you have two choices of how to report those dues to Texas PTA

- Mail the Texas and National PTA dues to Texas PTA on a separate membership roster, making sure to CLEARLY mark it as dues for the coming membership year and not the current one.
- Your PTA can keep these dues until August 1st. The treasurer should report these dues as escrowed money since this is money that does not belong to your PTA.

What other dates are important to know?

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

Additionally, be sure to check due dates for membership awards. You don't want to miss the opportunity to be celebrated!

When is the deadline to mail dues?

Unless you are working towards a membership award or goal, there is NO deadline to mail membership rosters and dues to Texas PTA. Ideally, however, you should mail a membership roster and dues within five business days of any member newly joining for that membership year. At a minimum, you should mail a membership roster and dues for any member that newly joined for that membership year, each month. a.

There are deadlines to be eligible for membership Awards. Please review those deadlines on the Texas PTA website, [txpta.org/membership](https://www.txpta.org/membership).

Do members have to pay Texas and National dues at every PTA they join? Yes. Each PTA is a separate non-profit association organized under the authority of the Texas and National PTAs and must be joined

individually. Each member must pay the dues listed in the PTA's bylaws (national, state and local portions) at every PTA they join.

Can people join online?

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

- Names and contact information of members who join online will automatically be added to your free PTAEZ account.
- There is no need to mail a roster or check for these members. Members who join at Jointpta.org are automatically reported to Texas PTA and immediately added to your membership count.
- Texas PTA will pay the Local Dues to your PTA approximately seven days after the end of each month.

Can I record and track all members in PTAEZ?

Yes. PTAEZ offers a simple feature that allows you to upload membership data into your free membership management system, if your PTA is on JoinPTA.org.

Do “Life Members” have to pay dues?

Yes. If an individual wants to join your PTA and says they are a life member, they must still pay the Local and National portion of your total dues amount. The list of Life and Honorary members can be found at <https://www.txpta.org/volunteer-recognition>.

Life members are exempt from paying the Texas PTA portion (\$2.25) of dues for only one PTA of their choice per membership year. If they have received more than one Honorary Life Membership, they may register as a Texas PTA Life Member with as many PTAs as they have Texas PTA Honorary Life Memberships.

Texas PTA Honorary Life Memberships do not carry with them automatic rights to vote or to hold office in any PTA. In order to participate actively in PTA, an honorary life member must join a PTA by paying the Local and National PTA dues and having his/her name included on the membership roster sent to the Texas PTA Office. Report Life Members by entering an “L” as the member type on the membership roster submitted to Texas PTA.

Who can view membership rosters?

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

What makes a person an official PTA member?

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

Sample Timeline

JUNE/AFTER ELECTION OR APPOINTMENT

- If you are an executive board member, register with Texas PTA through the online form at www.txpta.org/officer-intake.
- Take all required components of FOUNDATIONS trainings found online at www.txpta.org/training.
- Review materials from the outgoing chair, including Plan of Work and procedure book.
- Read membership materials provided by Texas and National PTA.
- Follow up with your President and Treasurer to ensure your PTA will meet all Standards of Affiliation requirements in a timely manner, to ensure your community does not miss out on any membership awards.
- Check to see if your PTA is listed on JoinPTA.org. If not, speak to the board about the opportunity.

JULY

- If you can, register for LAUNCH and attend membership workshops at LAUNCH
- Attend the Texas PTA annual meeting during LAUNCH to celebrate membership awards!
- Organize membership campaigns; determine incentives.
- Plan to attend all executive board meetings (if applicable to your PTA bylaws).
- Prepare a Plan of Work. You can review a sample in this guide and download a blank template from 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 and make appropriate plans for eligibility.

AUGUST

- THE MEMBERSHIP YEAR BEGINS AUGUST 1!
- Send Texas PTA the roster and dues of members who joined in the spring for the coming year. Confirm that the treasurer moves those dues out of escrow and into the dues income line for the current year.
- Submit Plan of Work for approval.
- Ask the president for membership cards that the Texas PTA Office distributed.
- Implement membership enrollment campaigns.
- Ask the 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.
- Publicize joining via JoinPTA.org or through your school's online site. Use all media – newsletters, newspapers, billboards, radio/TV, and the PTA and school websites - to publicize your goals and how to join. After permission from the principal, publicize by displaying posters in the halls.
- Inform teachers and staff on how and when dues will be collected.
- Have membership 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, repeating PowerPoint presentations, videos, and artwork to draw attention to the membership campaign progress.
- Ensure that there is a membership table at all PTA events
- Prepare a packet for the school office to distribute when new students enroll.
- Mail in membership rosters and dues frequently!

SEPTEMBER - DECEMBER

- 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 and make personal contacts with parents and teachers who have not joined.
- Provide updates on progress towards membership goals in the newsletter and at PTA meetings.

- Review eligibility for membership awards listed on the Texas PTA website, txpta.org/membership.
- Send in membership rosters and dues frequently!
- Continue to make personal contacts with parents and teachers who have not joined.
- Plan for spring membership campaign.
- Relax and enjoy the holidays!

JANUARY

- Kick off spring campaign.
- Continue to recruit new members and try to engage those who didn't renew.
- Evaluate progress and plan new approaches.
- Continue mailing membership dues, rosters, and awards applications to Texas PTA.
- Recognize outstanding membership numbers.

FEBRUARY

- Celebrate National PTA Founders' Day (February 17).
- Begin preparing the procedure book for the next committee chair. Collect and sort records of membership activities and copies of all recruiting materials used during the year.
- Continue mailing membership dues and rosters timely.
- Submit notification form to Texas PTA for any Special Category PTA Awards by Texas PTA deadlines.

MARCH

- Evaluate your progress, make written recommendations for next year.
- Keep mailing membership rosters and dues and stay aware of membership awards!
- Don't take a BREAK from celebrating membership numbers!

APRIL

- Continue to work on membership goals.

MAY

- Meet with your successor and pass on the procedure book and other records at the end of the school year.
- Ask for faculty input about contests or other incentives. This step is crucial to keep the goodwill of all faculty and staff.
- If you recruit new members during a Round-up or Open House follow the guidelines previously provided under "What is the membership year?" Make a roster of those members to give to your successor.
- Help your successor transition for the coming year.
- Celebrate success!
- Breathe a sigh of relief and wish the new committee well.

Recruiting: How to Get Members

Top 10 Recruiting Tips

1. Never start from zero! Personally ask each and every member from last year to renew their membership for this year.
2. Use Texas PTA's NEW back the future materials to grow membership.
3. Make joining easy by promoting JoinPTA.org.
4. Ask your principal to commit to achieving the Golden Apple Award.
5. Challenge every Executive Board member to recruit five new members.
6. Use social media to communicate and engage with members and the wider community.
7. Plan at least one member-only benefit, event, or program.
8. Create a PTA welcome kit for new families and invite them to join.
9. Brag about the great things your PTA does for kids, so everyone will want to join!
10. Review all of the award opportunities and make a plan to earn them all!

Preparing to Recruit

RESEARCH

If you knew what you could say or do to convince non-members to join, how would your recruitment messages change?

Here are some ways you can gather that information:

- Research what has been successful for your PTA in the past
- Look to the membership rosters and numbers from the past, who and how many people have been members
- Look at your predecessor's procedure book. There should be records there about past recruiting and how well their plans worked.
- Survey members and nonmembers to see what they want from your PTA. Discuss with executive board to determine specific goals for the survey
 - Choose questions that match your goal.
 - Only ask for information you plan on addressing (ie., membership, volunteering, programs, etc).
 - Keep your survey to a very few short but informative questions. Short surveys are answered more often.
 - Explain the purpose of the survey and thank members for their feedback.
 - Keep all individual survey information confidential.
- Have a plan to communicate the survey results and next step plans. A sample survey with additional instructions and more helpful tips is available at txpta.org/membership
- Ask the Principal what they think would be successful in your community.
- Connect with other PTA's Leaders in your community what they've done that's been successful.
- Speak to your Council Leaders to see what suggestions they can offer.

Part of your research should be to review the Standards of Continuing Affiliation. Deadlines for completion of the minimum annual requirements set forth by Texas PTA could disqualify your PTA from earning awards.

After doing your research, focus your invitation to join your PTA on what is important to the members of YOUR community.

PLAN



Specific <i>Who, What, When, Why, Which</i>	Measurable <i>From and To</i>	Attainable <i>How</i>	Relevant <i>Worthwhile</i>	Time-Bound <i>When</i>
<p>Define the goal as much as possible with no ambiguous language.</p> <p>Who is involved, what do I want to accomplish, where will it be done, why am I doing this, which constraints/requirements do I have?</p>	<p>Can you track the progress and measure the outcome?</p> <p>How much, how many, how will I know when my goal is accomplished?</p>	<p>Is the goal reasonable enough to be accomplished? How so?</p> <p>Make sure the goal is not out of reach or below standard performance.</p>	<p>Is the goal worthwhile and will it meet your needs?</p> <p>Is each goal consistent with other goals you have established and fits with your immediate and long term plans?</p>	<p>Your objective should include a time limit. "I will complete the step by month/day/year."</p> <p>It will establish a sense of urgency and prompt you to have better time management.</p>

- Based on your research and working with your committee, set SMART goals for recruiting members. Do you want a specific number ("A Voice for Every Child") or a percentage increase (20% more members than last year)?
- Decide HOW to recruit members.
- Decide how members will join. Will you emphasize using joinPTA.org (easy for you and them) or the traditional methods - envelopes, checks, etc.?
- Pick dates and methods for first membership drive (Registrations? Meet the Teacher event? Back-to- School event? Student folders? Emails? Social Media?)
- Determine how members will receive their membership cards.
- Keep tabs on your PTA's progress towards achieving Good Standing to ensure eligibility for awards.
- Discuss the entire year and make plans to keep recruiting members all year long.

Use these plans to complete your Plan of Work.

Use the goals and ideas generated to develop your Plan of Work (POW). The POW helps you clearly communicate to the rest of the executive board just how you plan to recruit and report PTA members. See the sample Plan of work earlier in the guide and find a blank plan of work at www.txpta.org

VALUE OF PTA MEMBERSHIP

PTA is the oldest and largest child advocacy association in America. Today's PTA consists of more than 4 million parents, teachers, grandparents, caregivers, foster parents and other caring adults who share a commitment to improving the education, health, and safety of all children. We speak with one voice for

every child. Today, the issues that affect our children extend beyond their individual schools. The PTA's nationwide network provides parents with the forum and tools to collectively influence the decisions that affect children not only at their schools, but also throughout their districts, within their states, and across the nation. This mission is unique to PTA. Many of the benefits our children receive today, such as universal kindergarten, the National School Lunch Program, and a juvenile justice system, were accomplished as a result of the PTA mission.

WHY JOIN PTA?

Help the community understand the value of their membership:

- **Support Your School.** Joining PTA is a simple and easy way to support your school and show your commitment to providing an excellent education to all children in your community.
- **Stay Informed.** Being a part of PTA offers members the opportunity to stay informed on what is happening at their children's school. There's no better way to know what's happening in your child's school and community.
- **Get Connected.** PTA provides opportunities to meet and network with the principals, teachers and other parents.
- **Effectively Engage.** Spend quality time with your children and the entire community of parents and children through PTA programs and events. Not only will you show how much you care about them but will also demonstrate the importance you place on their education.
- **Give Back.** By becoming part of PTA, you will be part of the solution, to help make positive changes in your child's school and in the lives of many children.
- **Speak Up.** PTA can be a way for you to be a voice for change.
- **Watch Yourself Grow.** As a PTA volunteer, you can use your skills and hobbies for a relevant cause while setting a good example for your child and all children in the community.

COMMUNICATE

1. **Hook** | Begin with an interesting statement or unfinished thought. Make it personal.
 - a. We back the future.
 - b. We enable children's dreams.
 - c. We make teachers love us.
 - d. We provide children with chances.
 - e. We make legislators pay attention.
 - f. We open doors.
2. **Line** | Stop and Wait for the question. "What do you mean?"
3. **Reel** | Briefly explain your statement. Focus on what you want the listener to remember about your PTA.
 - a. We provide opportunities to expand students' horizons.
 - b. We speak up about issues important to children's health and safety.
 - c. We help support the world's toughest job – parenting.
4. **Prepare** | Convey the value of PTA. Describe who you are and what your PTA does. I work with the PTA to:
 - a. Help all families be engaged in the education of their children.
 - b. Open doors for student learning opportunities in math, science and technology.
5. **Serve** | Describe why PTA is unique, how it operates, why it can provide better services.
 - a. We are the only child advocacy association that works for every child.
 - b. We engage the entire community to provide opportunities for all children.
 - c. We "build the village" that supports our students.

6. **Engage** | Explain why the listener should care. Explain what the listener can do.
- If you join our PTA you can help us make every child's potential a reality.
 - You believe in students and teachers, every voice matters. Join our PTA.

Message Do's and Don'ts

DO:

Be conversational
Make it personal
Listen carefully to the response
Show your passion
Be prepared for the next step

DON'T:

Sound rehearsed
Be too general Listen carefully to the response
Walk over the listener's feelings
Be mechanical
Forget to close with your "ask"

Everybody can, and should, write their own recruitment message. Make them short and easy to remember and say. Get your entire PTA executive board to practice their recruitment messages at an executive board meeting.

Sample Recruitment Messages:

- I can tell you care about children and PTA is here to help every child grow up well-educated, healthy, and able to achieve their potential in life. Our PTA does a lot of great things at the campus level and we would love to have your help, but it's not necessary. Your membership and support – your VOICE -- makes us stronger when we work with district, state, and national governing bodies to develop ways to help all of our children. Your membership can make a difference for kids. Would you join our PTA?
- No, you don't have to have a child in school. You just have to care about the future of children. No, you don't have to come volunteer on our campus. We'd love to have your help when you have time, though. We're a fun group and it's a great way to feel more connected to your campus. The most important reason to join PTA is that every voice speaking on behalf of children makes a difference. Your support is important to backing the future of all children. Would you please join our PTA?
- (For the student member)- Students are an important part of PTA. Our PTA does a lot of great things to assist the students at the school. We need to hear from students to make sure we are working on things that really do make a difference. Being active in PTA not only benefits the school and other students, but it benefits YOU. You can learn leadership and life skills that will be used for the rest of your life.

Who to Recruit?

Who can join PTA? Anyone who believes in and supports our Vision, Mission and Purposes. Anyone who shares your passion for making every child's potential a reality.

It should go without saying that your entire community should be asked to be part of your PTA - not just your friends, not just previous members, not just the people who volunteer every day.

On the following pages are some ideas for recruiting different groups of people. This is not an exhaustive list. The ideas listed are also generally useful for more than one group of individuals.

If you think of other ideas, please share them with Member Services at Texas PTA.

IDEAS FOR RECRUITING EVERYONE

- Just ASK! In study after study, the main reason people don't join PTA is because nobody asked them. Make as many personal contacts as possible. You and your executive board should make a point of asking people to join PTA.
- Ask the principal's permission to send PTA information home with students or to have it on the school's website. Leave membership information in the school office to be given to new families as they enroll.
- Use every form of communication available to you - School and PTA newsletters, websites, social media, email lists, fliers, posters, bulletin boards, marquees, and signs. Walk up and down the drop-off and pick up lines. Communication is important!
- Hold a membership contest between classes or grade levels
- Share information on discounts that members receive through their membership. See the Texas PTA and National PTA websites for current business who offer PTA members discounts
- Offer discounts to members at PTA events that have fees
- Have someone from the membership committee attend every PTA event (ie back to school, new family social, etc). Set up a table or walk around meeting people and ask them to join PTA.
- Cut a picture of your school into the number of pieces equal to your membership goal. As members join, put the pieces together.
- 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.
- Publicize your PTA's past accomplishments and goals for the coming year. Create a "BRAG BOARD" with pictures and fliers and programs that you can take to meetings and all school events. Make it attractive and interesting. People will want to join an active, involved PTA.

IDEAS FOR RECRUITING INCLUSIVELY

- Don't forget to ask groups that may not be familiar with the concept of PTA or are different in some way from previous members.
- Have a membership table when the PTA hosts any event.
- Recruit parents and translators to help with language challenges, provide headsets, hold bilingual meetings, etc. Translate information to ensure all audiences receive your message.

Request leaders from other cultures or communities to assist in customizing materials to best reach their community.

And above all, include everyone in invitations. A personal request to join is the most effective recruiting tool. Let everyone know you want and need them to help all children reach their potential.

IDEAS FOR 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 been some of its best volunteers and spokespersons and leaders.

Men are directly involved in the care and education of children. Research shows that “4 in 10 mothers are now the primary breadwinner, leaving the largest number of stay at home dads in history.” (Pew Research Center, “Parenting in America”, 2015) It is vital that PTA welcome and include men through programs and activities addressing their needs and concerns.

- Use gender inclusive language to promote male engagement in all communications from PTA.
- Include fathers, stepfathers, grandfathers, uncles, and older brothers; all men that play a significant role in the lives of your students.
- Communicate directly to men
- Challenge current male members to ask others to join.
- Articulate the importance of men in education
- Use the Male Engagement Toolkit at www.pta.org
- Remember to apply for the MARS award from Texas PTA to celebrate your male members.

IDEAS FOR RECRUITING AT SECONDARY SCHOOLS

- It is especially important to survey needs to be relevant in secondary schools. Include the entire community - students, teachers, administrators, counselors and other staff in membership and planning activities.
- Include parents, students, and an administrator on the membership committee.
- Send a letter of invitation to join signed by the principal, student body president, PTA president, and the membership chair. Let people know you are prepared to work together.
- 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.
- 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.

IDEAS FOR RECRUITING STUDENTS

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

- Set up a PTA/PTSA table on student registration days and other school events. Highlight activities that benefit students.
- Challenge a nearby school to a friendly student membership competition.
- Have students host the Membership table and invite their friends to join at open house, back to school night, orientations, etc.

IDEAS FOR RECRUITING TEACHERS AND ADMINISTRATORS

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

- Enlist the help of the principal.
- Personalize invitations Remind teachers of PTA’s vision, mission, purposes and that each campus is an independent PTA so joining at work is essential to support the campus even if they are a member at their child’s PTA.
- Hold a grade level or departmental membership competition.

- Challenge the staff at a nearby school to a friendly competition.
- Provide monthly drawings for teachers and staff who join with donated items from local merchants.
- Reward teachers and staff with a breakfast or luncheon when 100 percent membership is achieved.

IDEAS FOR RECRUITING EARLY CHILDHOOD PTA MEMBERS

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 to visitors at _____
Be sure to include materials about how to join your PTA.
- Ask local pediatricians and hospitals to post or display membership information. Include PTA materials in packets that local hospitals give to new parents.
- Ask permission to post fliers in community libraries and in child-oriented businesses.
- 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.

IDEAS FOR RECRUITING COMMUNITY MEMBERS

Schools are an integral part of our communities. What better way for community members to find out about what is happening in those schools than to join the PTA and support the students whose families live, work and shop in the community; the students who are the future of the community. Remind community members to back the future of all students.

- Provide your executive board members with membership envelopes and encourage them to take them to all community functions, events and businesses.
- Write letters to city council, elected officials, and school board members encouraging them to join
- Attend Rotary, Optimist, Kiwanis Club meetings and recruit their members
- Host a PTA table at any/every community event
- Send a letter to owners of local businesses and leaders of local organizations inviting them to join.
- Develop relationships with community groups, businesses, churches, newspapers and radio stations. Find business and commercial locations willing to display your PTA's information and to promote PTA among their employees/members.
- Request to display information at local community centers, libraries, businesses, etc.

How to Recruit?

BEGIN WITH A MEMBERSHIP COMMITTEE

Recruiting all those members can be a lot of work! This is where your Membership Committee comes in. Developing a good team helps make better plans, accomplish goals more easily, and build future leaders.

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

- Help with research and planning
- Work at the membership recruitment tables at all school and PTA events
- Serve as greeters
- Invite staff participation
- Distribute membership cards to members
- Complete the membership roster-keeping accurate records of names and contact information of those who join
- Inform members of membership goals the PTA has met and encourage continual recruiting of membership to meet additional goals
- Write thank you notes to members
- Use social media to recruit members throughout the year
- Review and evaluate past membership efforts
- Set a goal for members to be recruited

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

HOW THE EXECUTIVE BOARD CAN HELP

- Get all communications (paper, electronic and verbal) translated to the languages your parents speak. Seek help from school staff or community leaders if needed.
- Make sure meetings and communications are welcoming and accessible to everyone. Consider meeting time, location, accessibility. Consider non-traditional families.
- Create a friendly climate. Choose activities that appeal to different groups.
- Invite everyone not just “Parents” to join you
- Arrange activity times to fit the schedules of your community. You may need to vary the times of meetings and events to fit the needs of families.
- Keep your community informed and provide information of value.
- Organize field trips, arts and 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.)
- Survey the community to determine areas of interest for programs, etc.
- 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.
- Create men-focused groups and events
- Have meetings at varied times when all parents, teachers and students can attend.
- Elect or appoint students as executive board members. Emphasize the learning opportunities inherent in being a PTA leader
- Publicize the Texas PTA High School Senior Scholarship requirements
- Many Councils and Local PTAs also offer scholarships to graduating Seniors who have been involved as PTA members.
- Volunteering as a PTA member can provide service opportunities and hours
- Involve students in the planning and execution of PTA events.
- Consider changing your meeting time to encourage more student participation.
- Elect or appoint a teacher to the executive board
- Survey all teachers mid-year asking if they joined PTA and why, and if not, why not.
- Send all teachers information about the Texas PTA Faculty Scholarships
- Include meeting notices in child-oriented publications in your community.

RECRUITING TOOLS

Joining PTA should be easy both for members and for the Membership Chair. Records should be kept of all individuals who join the PTA.

we are _____ and

we back the future

apoya tu **Comunidad**



[PTA DUES ENCLOSED]

PTA Information / Información de la PTA
Avery Label 5162

- ✓ **Advocate for All Children**
Defensor de Todos Los Niños
- ✓ **Engage with Families**
Colaborar con Las Familias
- ✓ **Support Your School**
Apoyar a Su Escuela
- ✓ **Get Member Benefits**
Obtener Beneficios de Los Miembros

Join PTA. Unirse a la PTA.

But why not give people choices on how they would like to join by also providing JoinPTA.org as an option? JoinPTA.org allows anyone, anywhere to join online, using a credit or debit card. Out of town family members will find it especially easy to join this way.

Some PTAs have their own online membership site. Work with your PTA executive board to learn how to use this effectively.

For a Local PTA to appear on www.joinPTA.org they must input the required banking information into the ACH form found at <https://www.txpta.org/join-pta>.

NEW MEMBERSHIP TOOLS

In the 2020-2021 Member Card Box is a handful of literature to support your Membership recruitment, including:

- **Membership Goal Booklet:** A PERSONALIZED booklet with your PTA's 2020 membership goal. Find stats about your PTA from previous years, important dates, a snapshot of your PTA's bylaws, and more!
- **Quick Start Guide:** Dive into another year with the fundamentals of membership recruitment and retention.

Record, Report, and Remit

Record

We've talked about different ways your members can join PTA. They can join using cash/check and a paper form/envelope or they can join using jointpa.org or your PTAs own online membership site with a credit or debit card.

Since members can join in a variety of ways you will have to make sure you monitor all of the sources and create a master roster for your records.

- If they join using a form or envelope, keep those membership envelopes and forms until you have transferred all the information on them to your Master Membership Roster.
- If they join using jointpa.org, the members names will automatically be added to your PTAEZ account. If they Join using jointpa.org the members will be automatically added to your PTAEZ account.
- If they join using your PTA's own online membership site, make sure all necessary information is collected and you know how to download new members timely for reporting.

The Membership Roster

This is a spreadsheet used to submit member names to Texas PTA. Each time you submit names to Texas PTA, it should be new members only, not members who have previously been submitted. You will also want to keep a record that reflects all your members to date for your PTA's purposes. Ideally you want to be able to access this information by last name and membership type for easy reference to check who is a member. This is especially helpful when confirming eligibility to vote. The entire roster can be kept on your PTAEZ account (very easy since members from jointpa.org automatically show up there), on a spreadsheet on your computer (a preformatted excel spreadsheet that you can download is available at www.txpta.org), or on a paper Membership roster. Be sure to share copies of the roster with your Treasurer and Secretary. REMEMBER - this roster belongs to the PTA and should not be shared with anyone.

PTA MEMBERSHIP ROSTER and DUES REPORT

Mail with payment to: Texas PTA
408 W. 11th St.
Austin, TX 78701

****PLEASE RETAIN A COPY OF THIS REPORT FOR YOUR RECORDS.**

Date _____ PTA ID # _____
 PTA Name _____ Person Submitting Report _____
 School District _____ Email Address _____
 PTA President _____ Telephone Number _____

NUMBER OF MEMBERS AND DUES PAYMENT	
# _____	Regular Members @ \$4.50 each \$ _____
# _____	Texas Life Members @ \$2.25 each \$ _____
# _____	TOTAL \$ _____

Enter member TYPE for every member! R = Regular Member / Parent. F = Faculty. S = Student. C = Community. Check "LM" column if a Life Membership.
 PTAs should only enter members below who have NOT been previously reported to Texas PTA during the current membership year.

Last Name	First Name	*Member Type	*LM	Email address, physical address or phone
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				
19				
20				
21				

OFFICE USE ONLY: Batch _____ Check/Money Order # _____ Amount Paid _____

All membership rosters 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)

PTAEZ is a cloud-based system designed to help PTA leaders manage membership information for their Local PTA. While there are additional functions your PTA can pay for, the basic/membership/free version has many functions to make managing Local PTAs easier and includes:

- Membership – offers PTAs a place to keep the lists of members, alphabetically by last name.
- Reports – various membership reports for the executive board;
- Is compatible with JoinPTA.org, an option that allows people to join your PTA online (must be activated by completing the ACH form at <https://www.txpta.org/join-pta>);

Report and Remit

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

Report quickly and report often. Members names and dues should ideally be reported to Texas PTA within five business days of joining, but you should report at least monthly.

- Forward a copy of the completed membership roster to the Treasurer along with a completed check request form for the National and State PTA dues owed (\$4.50 per regular member and \$2.25 per Texas Honorary Life Member). Mail the original membership roster and dues check to the Texas PTA Office.
- Report only the names of new members for which you are submitting dues at that time. Members who have already been reported to Texas PTA should not be included on subsequent rosters.
- Ensure that the Treasurer is reporting the Texas and National portions of dues separate from the funds belonging to the PTA (this is known as escrow).
- Please work closely and carefully with your Treasurer to mail membership rosters and dues in an accurate and timely manner. Following National PTA's policy, Texas PTA will not reimburse overpayments more than 90 days after submission.

There are deadlines for Membership Awards. The Awards, their requirements and the deadlines change yearly. Learn more about these Awards on the Texas PTA website.

Policy on Refunding Dues



The process of remitting membership dues to Texas PTA is one that impacts the Local, State and National PTAs. With varying timelines and platforms in place for collecting and distributing dues to the appropriate PTA, Texas PTA will adhere to the refund policy below.

State and National Dues Received Via Mail at Texas PTA

Texas PTA will refund Local PTAs for excess or duplicate payments of State and National dues within the same membership year only if both of the following criteria are met:

- Written refund request is received at memberservices@txpta.org within 90 days of the original date of Texas PTA's receipt of overpayment; and
- Written refund request is received at least 15 days before the end of the National PTA membership year.

Local, State and National Dues Received Via JoinPTA.org

Texas PTA will refund dues received via JoinPTA.org only if both of the following criteria are met:

- Written refund request is received at ptasupport@joinpta.org within 48 hours of the original transaction or the first day of the month immediately following the referenced transaction, whichever is earlier; and
- Written refund request is received at least 15 days before the end of the National PTA membership year.

All eligible refunds will be made directly to the individual whose credit or debit card was used in the referenced JoinPTA.org transaction.

Processing Fees Received Via JoinPTA.org

Texas PTA will not refund Processing Fees on duplicate transactions or transactions made in error by the member.

Keeping and Engaging Members

Once you have recruited members, it is important to find ways to make them feel like they are an important part of a vibrant association. Engaging members not only makes them feel valued, they are more likely to renew their membership when given the opportunity.

Membership Chairs work closely with Programs Chairs to share information about what members want and expect from their PTA. Work with Hospitality Chair to make sure that your PTA is welcoming and friendly to EVERYONE. Work with the Communications Chair to share PTA information and ask people to join.

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 utilize 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, executive board member names, and a calendar of events.
- Recognize new members by name at PTA meetings, in newsletters, on bulletin boards, etc.

Key ways to keep members:

- Communicate - Keep in touch with members all year long. Be sure that members know what the PTA is doing and what events are happening. If members feel connected they will be more likely to rejoin your PTA.
 - Make personal contact as much as possible whether by phone or catching up at school
 - Send regular emails and/or newsletters to members
 - Send important school or community information to non-members as well as members (helps with recruiting as well as retention)
 - Make contact to offer volunteer opportunities - recruit help!
- Involve - Offer members opportunities to be involved and participate in PTA. They want to make a difference for our children. Engage members by creating volunteer opportunities and providing programs that will be of value.
 - Offer regular volunteer opportunities that vary in time commitment and skill level. Describe the jobs very specifically, including the amount of time required, so that volunteers know just what is expected of them
 - When possible, create volunteer opportunities by breaking bigger jobs down into several smaller pieces. This will engage more members as well as prevent burnout of others.
 - Ready! Set! Achieve! Programs are free and available through Texas PTA and give your parents/grandparents the tools they need to raise children

- Bring in community programs that will support PTA families
- Create Importance - Make PTA important to members by being sure that the PTA name is on every event, flyer, and program that is sponsored by PTA. Make PTA visible! Members will return if they find value in the organization.
 - Have a large banner made for your PTA that can be displayed at every event which is sponsored by your PTA
 - Be sure all printed material has the name of your PTA clearly visible
 - Design spirit wear that includes the name of your PTA
 - Make sure your members know about your goals and accomplishments
 - Be sure to point out member benefits from voting rights to discounts
- Recognize - Show members how important they are to the PTA family through recognition and reward. Show your appreciation for their support and contributions. If members feel that they are an important part of the organization they will want to return because they feel needed. More information about some types of PTA recognition are included later in this section.

IDEAS FOR HOW TO ENGAGE YOUR MEMBERS

Never underestimate the value of a sincere “Thank you for joining PTA. Your membership makes a difference.” Attach a thank you note to their membership card. Perhaps have students make the thank you cards.

- Celebrate ALL your members throughout the year! Handwritten thank you notes from your PTA team/ executive board members after a big event (or even a small one) is always a big hit!
- Host several ‘meet & greet’ opportunities for your membership to get to know each other at the beginning of each school year and each January. Provide a fun icebreaker/scavenger hunt along with light refreshments and a simple ‘thank you’ message from your PTA.
- Host a ‘volunteer orientation or volunteer kickoff’ in the fall and spring times for new and returning families.
- Share advocacy reports and updates from Texas PTA via website and social media outlets.
- Connect with the grandparents in your community as they join your campus for National Grandparents Day each September.
- Spotlight the National Walk to School or National Bike to School event held each October and April as part of your campus healthy lifestyles campaign.
- Host either a family board game or reading night in the fall and spring time as fun ways for families to connect within your communities. Choose something that many ages and backgrounds can enjoy.
- Provide a FAQ section on either your PTA website or at your events such as --” I am not able to volunteer, why should I join? Your \$XX membership dues helps to support various programs, presentations and help show your child/student that you are involved in their education.” And show pictures!!
- Partner with a nearby school in your feeder pattern for joint presentations and events that will bring both communities together. Get to see some familiar faces along with new ones too!
- Evaluate your membership by seeking feedback through surveys, social media or PTA website.
- Offer a door prize to members (not just attendees) at your PTA meetings -- must sign in and be present to win!
- Indicate on printed sign-in check lists how many years a person has been a member
- Remember to thank members for the volunteer work they do.
- Host a Volunteer appreciation event at the end of the year. Give certificates and public thanks for work.
- Be welcoming to everyone when they come to all PTA events. Everyone likes to be welcomed with a smile and a friendly greeting. Being a greeter is a fabulous job for a new volunteer with limited time.
- Reserve the best seats at PTA meetings and programs for “Members Only”.
- Publicize tangible member benefits from National and Texas PTA (discounts, participation in Reflections, eligibility for scholarships, etc)

WHY DIDN'T THEY RENEW?

Unless you ask, you'll never know. Before you write off those who haven't renewed their membership, try to discover why. A personal visit or phone call is preferable, but a letter or email can sometimes work. Be sure to mention the accomplishments of your PTA and the benefits the member gains through their membership.

CELEBRATE YOUR SUCCESS

One of the responsibilities of Membership Chairs that is often overlooked is celebrating success, but it is critically important to engaging with members.

Success begets success. When you are successful, shout it from the rooftops! People want to be part of a successful group. Celebrating your success accomplishes two goals - both appreciating members and aiding recruitment. Sharing accomplishments also reminds members that their PTA is part of a larger association that does care about them.

- Share your success with your membership.
 - Have you reached a goal or new milestone?
 - Have you earned an award for staff, men, students, grandparents, community members joining? When your PTA receives an award, tell EVERYONE!
 - Don't forget to share the great things your PTA is doing with member dollars. Let them know that their efforts and dollars are directly supporting their child.
- Share your success with Texas PTA.
 - Texas PTA and your colleagues across the state want to know what's working in your community. The Texas PTA Membership Committee is collecting and publishing success stories and wants to hear from you! What's worked in your community? Would you like some fresh ideas? Visit txpta.org and look for ways to share your membership success stories and read others' stories.
- Apply for Texas PTA Membership Awards
 - Reaching membership milestones
 - Increasing membership
 - Successfully engaging specific member groups
 - Achieving special membership challenges
 - Watch the Texas PTA website each August for criteria!

While most Membership awards are automatic, don't forget to apply for those that do need an application to be completed (MARS, Student Membership, Student Participation, Golden Apple, A Voice for Every Child, etc).

HONOR OUTSTANDING MEMBERS

Outstanding members and/or volunteers whose work benefits students and the PTA should be recognized in special ways. There are many ways to do this ranging from the very simple to very special. **The responsibility of recognizing and appreciating volunteers may be the membership chairs responsibility, but every PTA is organized differently, so check with the executive board and read any notes from the previous membership chair to determine if this is your responsibility.**

Local PTA Recognitions

- Feature members' accomplishments in your PTA communications. Write an article or post a story about members. It is an honor for that particular member and could encourage their friends to join.
- Create your own award to recognize outstanding accomplishments. The criteria for presenting these awards should be in your PTA's Standing Rules.

- Recognize 2-year members, 5-year members, 10-year members, etc. To do this, you will have to make sure rosters are kept safely. A few ideas:
 - 2-year members might be something as simple as a “Welcome Back” card when you give them their membership card.
 - 5-year members get “Welcome Back” card and recognition in the newsletter/PTA website
 - 10-year members get all of above and a lapel pin
 - 15-year members could get a special parking space or name badge
- Be creative and know what motivates your members!

Council PTA Recognitions

Some Council PTAs have created their own membership awards for Local PTAs and criteria for presenting them. Check with your PTA Council Membership Chair to see if they offer any special recognitions to PTA members who have made a special difference in the lives of children in your community.

Texas and National PTA Recognitions

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

If you would like to honor a member with one of these awards, you will need to ask the Treasurer to make a budget amendment for the cost of the award and get the amendment approved by membership. A committee should then be formed to discuss and review possible recipients for these prestigious awards. More information about how to apply for these awards can be found on the Texas PTA website.

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. 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.

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 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. More information about this extremely prestigious award can be found on the National PTA website.

Your Council PTA may also offer a celebration of these awards for all PTAs in their service area.

Finance for Board Members

Financial Considerations

Every single board member should be knowledgeable on the financial responsibilities of the PTA. Below is basic information on finances that every board member needs to be aware of. There is so much more involved in the every-day financial management of a PTA... these are the basics. For more detailed information visit www.txpta.org/treasurer.

Fiduciary Responsibility

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

Executive board members have three fundamental fiduciary duties: a duty of care, a duty of loyalty, and a duty of obedience.

- The **duty of care** means that the board member actively participates, attends board meetings, is educated on the industry, provides strategic direction, and oversees the day-to-day operations of the PTA;
- The **duty of loyalty** requires the board member to operate in the interest of the local PTA and not to use the position to further personal agenda;
- The **duty of obedience** requires the board to know the state and federal laws and regulations that apply. This includes the regulations and guidance issued by the IRS. Obedience to governing documents requires a deep understanding of the operating documents (by-laws, rules, board manuals). Finally, obedience requires that the board not act outside the scope of the organization’s legal documents.

Fiduciary responsibility in a PTA means the executive board members act as trustees of the organization’s assets and must exercise due diligence to oversee that the organization is well-managed and that its financial situation remains sound. The executive board verifies that all filing requirements and tax obligations are completed.

Budget Basics

The budget creates the framework for program management and overall administrative decisions. An approved budget must be in place at all times in order for expenditures to be made and fundraisers to be conducted. The budget is presented and adopted by the membership at the last membership meeting of the year and is amended at the first membership meeting based upon approved Plans of Work submitted by the new executive board members. The members always approve expenses and income via the budget, which can be amended as needed.

Financial Reports

To keep people informed, a current financial report is presented at every regular executive board and membership meeting. As the funds belong to the members, they have the right to access the financial reports presented at membership meetings.

Financial Transactions

Payments

Payments are never made in cash and blank checks should never be issued. All payments must relate to an approved budget item and have a reimbursement form with a receipt and/or bill attached. No other organization may pass its money through the PTA account in an effort to achieve tax-exempt status, and money can never be “turned over” to the school and/or principal to spend at their discretion.

Depositing Funds

All monies collected are turned over to the treasurer as soon as possible. Money is counted by at least two people at the same time, and both counters and the treasurer each sign and keep a copy of the completed Texas PTA Deposit Form (recommended). The treasurer may be one of the two counters.

Insurance

It is in the PTA’s best interest to cover the treasurer and all other persons authorized to handle money with a fidelity bond and officers liability to cover losses through any fraudulent or dishonest act. Insurance premiums are budgeted as an expense line.

For more details on financial procedures for your PTA please see visit www.txpta.org/treasurer.

Keeping Records

Compiling and maintaining a complete record of your activities can be a huge help to those PTA Leaders who follow behind you. Passing along important information to your successor gives them what they need to get started! New Leaders that have access to previous PTA practices can more easily adjust or make needed changes.



How to Compile Your Records

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

SUGGESTED CONTENTS

BYLAWS/STANDING RULES

- A current, date-stamped copy of the PTA Bylaws and Standing Rules. The parliamentarian should request a copy each year (after August 1) from Texas PTA and distribute to all executive board members. Visit www.txpta.org/bylaws for more information.

ROSTERS

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

ITEMS RELATED TO YOUR POSITION (as applicable)

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

PTA MEETINGS

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

Standards of Continuing Affiliation



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

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

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

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

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

Notification:	Texas PTA will notify the PTA of the action(s) required to attain Good Standing. The Local PTA will have 60 days, from the date of the notification, to meet all Good Standing requirements to avoid moving into the Restriction Phase.
Restriction:	While in the Restriction Phase, the Local PTA is not eligible for awards, programs or grants administered by Texas PTA or National PTA. The Local PTA will have 45 days to meet all Good Standing requirements to avoid moving into the Intervention Phase.
Intervention:	Once in the Intervention Phase, Texas PTA will assign a Support Team to assist the Local PTA, including the development of a written action plan to attain Good Standing. The Local PTA will continue to be ineligible for awards, programs and grants administered by Texas PTA and National PTA until Good Standing is achieved. <i>*With cause, Texas PTA may place a Local PTA that has not met all Good Standing Requirements into the Intervention Phase early.</i>
Restructure:	For Local PTAs that do not attain Good Standing following the Notification, Restriction and Intervention Phases, Texas PTA may begin the process of restructuring the leadership of the Local PTA or revoking the Local PTA’s charter.

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

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 Trainings:

1. **ESSENTIALS** is a high-level orientation to PTA that is taken online via the Texas PTA website at www.txpta.org/training. It contains the mainstay information that every PTA Leader should know. Executive board members should take this training at least once in their PTA career. Leaders are encouraged to take Essentials (formerly titled Foundations Leader Orientation) again whenever the training is updated.
2. **BASICS** contain detailed information to support PTA Leaders in their specific board position. Every executive board member must attend a BASICS course for their specific position. These training sessions are available on-demand via the Texas PTA website. Visit us online at www.txpta.org/training to register.
 - a. BASICS include a workshop and companion Resource Guide, along with other supporting resources.
 - b. PTA Leaders can access the Resource Guides via the Texas PTA website or online store. Visit www.txpta.org/local-pta-leaders to download free PDFs or www.txpta.org/shop to purchase hard copies.
3. **SPOTLIGHTS** offer a short, in-depth review of some of the specific yet important topics and recurring PTA functions such as Bylaws and Standing Rules, Financial Reconciliations, Conducting a Meeting, and Nominations and Elections. Spotlights are free and are not mandatory but offer vital insights on specific and timely topics.

Reminder that both the ESSENTIALS and BASICS are mandatory for executive board members. Visit www.txpta.org/training to learn more!

NEWSLETTERS AND ALERTS:

Texas PTA provides content-specific newsletters based on your PTA position. Please be certain you have registered as an officer to let Texas PTA know you are serving as a PTA Leader each year. Registering as a Local PTA Leader will help ensure you receive important updates and position-specific newsletters! Visit www.txpta.org/officer-intake to access the form.

All executive board members are encouraged to follow Texas PTA legislative advocacy efforts closely by subscribing to Under the Dome, our advocacy newsletter. Sign up at txpta.org/take-action.



 Texas PTA

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