

2020–2021

Official Local PTA Leader Kit

Membership Quick Reference Guide



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Welcome!

Congrats and thank you for taking on this important role for your PTA on behalf of all our children! A growing and engaged membership is the foundation for achieving PTA's mission to *make every child's potential a reality*.

This guide provides tips and resources to help all PTA leaders understand their role in membership development, including key roles and responsibilities, effective messaging, growing membership by learning about your unique community, developing a recruitment & renewal plan, and tracking and reporting membership.

Key Points to Remember:

- **Building relationships is the key to growing your membership.** We often think about membership in terms of tactics—flyers, forms, incentives, benefits. While these can be important, membership growth is driven by people, not paper.
- **Welcome all families and school staff.** Show that new faces are welcome by being open to new perspectives and ideas.
- **Listen to understand.** Ask questions to explore *why* people feel the way they do. Use tools such as surveys, suggestions boxes (physical or virtual), and social media to better understand your membership's needs and interests.
- **Focus on what makes a meaningful difference.** Emphasize actions that will have the greatest impact on students, teachers and your school—and communicate this focus to your members.
- **Value time.** Make sure parents know that volunteer time is not a requirement of membership. When they do volunteer, make sure time spent on PTA is meaningful. Share your progress often, so parents and teachers see that PTA is a worthwhile cause.
- **Be flexible.** Show your membership that their leaders can respond to changing circumstances and shifting priorities.

Throughout your navigation on this website, be on the lookout for opportunities to **Dig Deeper** by checking out additional tools and resources, or some of the many E-Learning courses available at www.pta.org/elearning

Find Out More:

- **Membership Roles & Responsibilities**
- **Messaging**
- **Listening to Your Community**
- **Developing a Plan**
- **Tracking and Reporting Membership**

Membership Roles & Responsibilities

Membership growth is all about relationships. Building and sustaining good relationships with the school community is a key responsibility of **every PTA leader**.

Effective membership recruitment and retention plans require the entire Board's support. However, the **Membership Chair** and **Membership Committee** play critical roles:

Membership Chair

Your Membership Chair or committee is responsible for facilitating the work of the Membership Committee and ensuring timely, accurate communication with other PTA committees and officers. Membership Chairs are often tasked with:

- Developing and deploying a year-round membership recruitment and retention plan (with emphasis during the big Back to School time in your community);
- Coaching other PTA leaders in how to talk about PTA and membership with others;
- Drafting and distributing membership promo and sign-up tools;
- Promoting membership at events for school staff and families;
- Collecting and tracking membership forms and dues in partnership with the Treasurer;
- Entering forms into the PTA system;
- Distributing membership cards and encouraging online PTA sign-up; and
- Providing membership reports to the officers or Board.

Dive Deeper:

- [Membership Basics eLearning Course](#)

Look to recruit individuals who:

- Are excited about PTA and willing to share their excitement;
- Have connections into parts of your community you don't;
- May be past PTA officers who know your PTA's history and successes;
- May be new members who are enthusiastic about the work your PTA does; and
- Have experience in marketing, public relations, sales, recruitment or statistics.

Your First 30 Days As Membership Chair

The more members you have, the more possibilities there are to fulfill our PTA mission: *to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.*

If you take each of these steps in (roughly) your first month in office, you'll be off to a fantastic start!

- 1. Plug In.** Your state PTA and National PTA are here to help and support you. Getting connected right away will make your job much easier! Here's how:
 - o **Contact your state PTA.** Ask who to call if you have questions about membership. Find out what training is scheduled in the near future that can help you and your Board get off to a good start. Visit your [state PTA web site](#).
 - o **Explore National PTA resources.** Start with this kit, but learn more from National PTA through e-learning courses, the One Voice Blog, e-newsletters, social media (Facebook, Twitter, Pinterest, Instagram, YouTube) and Our Children Magazine.
- 2. Gather.** There are several items you'll want to put your hands on right away to be sure important records aren't lost in the transition. Collaborate with the past officers to gather these records:
 - o **Your PTA bylaws** (and any accompanying standing rules), to find important information about membership.
 - o **Current membership roster.** You should be able to obtain this from your President or previous Membership Chair, Treasurer or Secretary.
 - o **Prior year's membership recruitment and retention plan or tools.** Although you won't want to just repeat last year's plan, it can be a starting place for the following year. Ask the outgoing Chair to share any information about each activity's effectiveness—a binder, a flash drive, a Google drive even a box of old papers—to help you develop your plan.
- 3. Build Your Team.** You don't have to do this alone! Every PTA Board Member is on your team. Others you might want to include are people who:
 - o Have a genuine enthusiasm for your PTA's mission, activities and accomplishments
 - o Are connected to or are a representative of under-represented populations in your PTA (i.e., dads, teachers, grandparents, English language learners, families of kids with special needs)
 - o Have experience in marketing or public relations
- 4. Dive In.** Once you've completed these steps, you're ready to start developing membership messages, goals, and activities for the year.

Listening to Your Community

Growing membership is an intentional and continuous effort to build positive, productive relationships, beginning with your PTA Board and continuing with families, teachers, and school staff.

Your PTA will increase in membership if every aspect of your PTA—every event, every communication, every interaction—is viewed as a way to achieve strong, positive, two-way communication with your community.

To do this effectively, you need to listen deeply to what families, teachers, and community members want and need.

Since PTAs are for everyone, units should seek to understand and support the needs of a wide variety of members—from future parents to senior citizens. Imagine how strong your community could be if every parent, every community member, and every business leader found a reason to get involved in PTA!

Dig Deeper:

- Sample membership survey
- Membership Growth Plan Worksheet

QUESTIONS TO CONSIDER	WAYS TO LEARN MORE
Do your Board and membership reflect the diversity of families at your school (including race/ethnicity, socioeconomic status, language preferences and cultural norms)?	<p>On www.GREATSCHOOLS.org or your school district website, you can find the following information about your school:</p> <ul style="list-style-type: none"> • Racial/ethnic make-up • Percentage of families receiving free/reduced-price lunch • Percentage of English language learners
How do families and staff think PTA should support student success and well-being, or school improvements?	<ul style="list-style-type: none"> • Survey • Listening sessions • Invite feedback
What limits families and school staff from supporting or volunteering with PTA?	<ul style="list-style-type: none"> • Survey • Listening sessions • Invite feedback

When your PTA has shifted gears or improved something because you listened, share that! It reinforces the message that feedback is important and new ideas are welcome. For example:

- “PTA heard from our members ... and in response we will ... ”
- “Thanks to your suggestions ... we will ... ”
- “Our survey results showed ... and as a result we are ... ”

Messaging

At the heart of PTA’s mission are families and communities—people who become champions for our children. This is what sets us apart from other school-parent organizations.

Membership Begins With ME

Whether I am attracting new members or retaining existing ones, it all starts with ME: why I care about PTA and how I communicate my PTA story to others and embody the PTA mission in my actions.

Think About Your WHY

- Why do I want to **make every child’s potential a reality**?
- Why do I think parents, teachers, and other family and community members are key to helping kids learn and grow into positive, productive citizens?
- Why do I believe PTA helps achieve that?

Think About PTA’s Value to Students, Teachers and Families

People will respond to your personal story. But in the end, they will join your PTA if they find value in what you do. And those who join will renew their membership when that value is delivered.

Think about your PTA. What does your PTA do—or aim to do—to:

- Engage and empower families to support their child’s learning, health or safety?
- Support teachers and school administrators?
- Improve your school or community?
- Connect families, teachers, and community partners?

Now Talk About It: Everywhere and Often

It doesn’t have to be Membership Monday to talk about how PTA makes a difference to you—and to the students, teachers, and families PTA serves. Every program, event, activity, advocacy win should be communicated and celebrated. Show the results, and thank the people who helped make it happen. Be transparent, especially about what was raised or spent financially. People want PTA to focus your efforts, value their time, and show you care with transparency about results.

Learn more about how to communicate your PTA’s value to your unique school community in the [Overcoming Objections](#) and [Listening to Your Community](#) sections.

Dive Deeper with National PTA’s “Backpack Bundle”

- Connect with Your Child’s School & Community (Spanish version)
- You Are Your Child’s Advocate (Spanish version)
- Today’s PTA Poster (Spanish version)
- 15 Things You Can Do to Engage in Your Child’s Education (Spanish version)
- 2017 Member Benefits Flier

Dig Deeper:

- Membership Growth Plan Worksheet
- Template Membership Plan
- PTA Engagement Activity Planning Template

Overcoming Objections

Most objections to joining PTA fall into the areas of time, impact and perceived value.

- [Objection #1: “I don’t have time”](#)
- [Objection #2: “I don’t like to fundraise”](#)
- [Objection #3: “I don’t know what PTA does”](#)
- Other Tips for Handling Objections

OBJECTION #1: “I Don’t Have Time”

RESPONSE: *Time is not required as a PTA member. Your membership supports our PTA in all we do for students, teachers and our school or community. You want the best for your kids and we help to make that happen.*

Parents often say, “**I don’t have time.**” But they also say:

- “I want the best for my kids – they are my priority.”
- “Being present helps my child to stay on track—and I want my face to be known to the principal, teachers and other kids.”
- “It’s fun to be with my child and get to know other families.”

When parents say they don’t have time to join PTA, what they are probably saying is that they do not want to volunteer dozens of hours each week. That’s why it’s important to give them options on your membership form and communicate time commitment required:

- **Member** (no time commitment)
- **Member + Volunteer** (I will help when I can! Add me to your volunteer email list!)
- **Member + Committee** (Reach out to me to find out my interests, skills, talents that can help PTA)
- **Volunteer** (I want to help, but paying isn’t possible right now. Add me to your volunteer email list! PTA will seek additional donations to cover membership fee)
- **Support PTA with an additional donation!** Your donation covers membership dues for families who can support PTA as a volunteer only. Also, donations contribute to the overall budget to support students and teachers, while improving our school. Tax-deductible receipt will be sent.

Respect the “no time” answer but make sure you continue to communicate with these members about the impact your PTA is having on their child and school or community. Follow-up with those who have expressed interest in volunteering or leading on a committee and match their interests, skills and talents with a PTA responsibility that is meaningful and values the time they give.

OBJECTION #2: “I don’t like to fundraise”

RESPONSE #2: *You do not have to fundraise as a PTA member. When you join PTA, you are helping us to accomplish our mission—to make every child’s potential a reality by engaging and empowering families to advocate for all children. This year, we are supporting students and teachers by <insert 2-3 specific examples>. Also, we are improving our school or community by <insert 2-3 specific examples>. Your PTA membership helps to make that happen—and you don’t have to commit time or anything more when you join PTA—unless you want to! We always welcome the ways you feel you can help!*

Many people have the perception that PTA is a fundraising

organization. Reflect on that. Is that all they see from your PTA? To grow membership, you have to prove that your PTA is more than a fundraising machine—what makes PTA different than other parent-teacher organizations is that we are advocates for our students, teachers, families, schools, and communities.

You will hear this objection less frequently when parents, families and teachers understand what PTA does with the money you raise. Start to shift the “PTA only fundraises” perception by:

- Developing a focused goal that families will feel passionate about supporting and describe the two to three milestones that will help you achieve that goal. What are you raising money for? Example: “We are focused on supporting literacy at our school. To do that, we will X, Y and Z.”
- Being transparent about your budget. At least monthly, promote funds raised and communicate how the funds helped to achieve your PTA’s goals. Make your [financial reports](#) accessible to all members.
- Planning smart. Ask your PTA members about your current mix of fundraising tactics. Is it too much? Are there ways you could do less and make more? Check out our [Fundraising tips](#) for more ideas.
- Tooting PTA’s horn every step of the way! [Communicate](#) about your progress at events, in your newsletter and on social media. Give your Board Members and school staff talking points to get the word out!

Dig Deeper:

- Preventing Theft in Your PTA E-Learning Course
- PTA Financial Management Checklist
- Fraud Prevention Checklist
- Finance E-Banking Best Practices

OBJECTION #3: *“I don’t know what PTA does!”*

RESPONSE #3: *Oh! I’d love to tell you about PTA—but first, what do you think the kids of our school and community need most to succeed in school and life?*

NOW LISTEN, ASK MORE QUESTIONS, THEN MATCH PTA TO WHAT THEY SAY ...

You make such great points. That’s why, this year, PTA is on a mission to support students and teachers by <insert two to three specific examples>. Also, we are <insert two to three specific examples of school improvements that align with what they recommend>. Your PTA membership helps to make that happen. It’s so easy to join—and no time commitment is needed—unless of course you want to help! We always welcome you to join us as we fulfill our mission to make sure every child has what they need to succeed in school and life.

The key point is to listen and to align what you hear with what your PTA is focused on achieving. The best sales people—and leaders—listen. When you understand the concerns and perspectives of your families, you’ll make a plan that they want to support. You’ll show them you are focused, you care, and you value their time.

Other Tips for Handling Objections

People like to join organizations that make a difference, allow them to network with successful people, and provide opportunities to have fun. Talk about how PTA membership extends beyond your school building or community. Connect your members to National PTA and your state PTA’s advocacy efforts, parent education tools, and programs.

And of course, don’t forget the benefits offered to all PTA members by National PTA:

- Dozens of national programs, experts and turnkey resources;
- Regular updates and advice in the form of e-newsletters, PTA.org, Our Children magazine;
- Leadership development and training for PTA members through webinars and e-learning courses;
- Millions of dollars in grants for local PTAs to help build PTA capacity and skills;
- Prestigious national awards;
- Cost savings from national retailers and other PTA partners; and
- Support services and staff to help establish and manage your PTA.

Developing a Plan

After you Listen to Your Community and craft your messaging, develop a plan.

Start with a Membership Goal

Begin by setting a membership goal for the year. You can also consider using a 2-5% increase over last year's membership as a target.

Or if you want to be bold, use this simple formula:

Desired % of student enrollment + Number of school staff = Membership Goal

*Example: The school has 754 students and 75 staff.
Goal is 377 family members (50% of 754 students) + 75 staff = 452 members*

Be reasonable with your desired percentage. Work with your PTA Board to determine the percentage that gives you a stretch without too much stress. A PTA membership goal should feel achievable.

Dig Deeper:

- Membership Growth Plan Worksheet
- Template Membership Plan
- PTA Engagement Activity Planning Template

Determine Membership Options

Look at your bylaws to determine the options you can offer for members, such as:

- **Member** (no time commitment);
- **Member + Volunteer** (I will help when I can! Add me to your volunteer email list!);
- **Member + Committee** (Reach out to me to find out my interests, skills, talents that can help PTA); and
- **Support PTA with an additional donation!** Your donation covers membership dues for families who can support PTA as a volunteer only. Also, donations contribute to the overall budget to support students and teachers, while improving our school. Tax-deductible receipt will be sent.

Depending on your bylaws and guidance from your state PTA, you may also have the following membership options:

- **Student Memberships**—You may be a PTSA (Parent, Teacher, Student Association). If so, students are as much a part of your PTA as parents and teachers. Follow your state guidance on PTSAs. Consider ways students can get involved in the mission implementation and ensure their voice has equal weight to other member types.
- **Volunteer Only**—Some families or school staff may want to support your PTA but can't afford the fee at this time. Consider starting a membership fund with additional donations generated through the membership sign-up process so that anyone who commits time becomes a card carrying member. Be sure to work with the Treasurer to reconcile "volunteer only" membership dues with donations.

- **Family Memberships**—Some PTAs offer family memberships. The state and National PTA dues portion for each person who joins through a family membership are forwarded to your state. Remember that each person who joins through a family membership:
 - o Is an individual member and entitled to all the rights and benefits of membership, including the right to vote at your meetings and a membership card;
 - o Should provide you with their name and contact information, which must then be reported to state and national to initiate membership benefits;
 - o Pays dues. Your unit may decide to assess a flat fee for the first person who joins, then a reduced fee for your unit’s portion of the dues for each individual member;
- **Teacher/School Staff Membership**—Some PTAs offer teachers a discount membership and focus the membership promotion on the ways PTA specifically supports teachers and classrooms. Teachers can be great supporters of educational programs, promoters of PTA, and partners in engaging families in a meaningful way.
- **Corporate or Community Memberships**—Some PTAs offer corporate or community memberships. These are flat fee memberships that generate financial support from community-based donors that service the families of the community (i.e., restaurants, grocery stores, doctors, lawyers, insurance companies). See template **Community Membership** recruitment tool.

Incorporate Messaging in Your Membership Tools & Plan

Your membership committee will create a membership packet and marketing plan. In these tools, incorporate [messaging](#) that will most appeal to parents, teachers, etc. A membership packet may include:

- o Brief letter from [President](#) explaining your mission focus for the year
- o Membership form or online link
- o Membership options
- o PTA calendar of events, programs or activities
- o Photos or graphics to help sell PTA via social media
- o Member benefits (local, state or [national](#) benefits to PTA members)

Develop a timeline for distributing these resources and communicating messages about membership to recruit parents, students, school staff, and community members to join PTA or renew membership. The plan is something every PTA Board Member can help to implement.

See Template Membership Form and [Sample Marketing Plan](#).

Find Out More:

- [Recruitment Ideas](#)
- [Suggested Timeline](#)
- [Member Renewal](#)

Recruitment Ideas

The methods you use to promote PTA can be formal or informal; they can include events, e-mail, phone calls, websites, e-newsletters, social media and more.

The best way to recruit members is to talk about PTA. Whenever you can, speak positively about how your PTA is helping students, teachers, and school or community. Let friends know the ways to join (form, online). Make it easy for people to join and support your efforts as members.

Other Member Recruitment Ideas

- **Ask your Board to recruit 10 people** each. Give 10 (or so) membership packets at the first meeting and ask them to canvas their neighborhood, friends, or family.
- **Host a “Back-to-School” event** during the summer or first week of class. Consider grade-specific meet-ups or a new family welcome picnic. Grandparents’ events are also great member (and volunteer!) recruitment opportunities.
- **Distribute a take-home flier** with the membership form and calendar of upcoming PTA programs.
- **Use social media accounts** to ask for input, celebrate successes and create pride in your school and PTA. Remind people throughout the year to join! Consider posting membership recruitment announcements in neighborhood or community social media. Community support is important to the success of your PTA!
- **Ask local merchants or restaurants to give a discount to PTA members.** Recruit five hometown favorites to include on a Local PTA Member Benefit Card. See template letter.
- **Set up membership tables** at your events.
- **Keep your PTA website current**, including the PTA mission, your PTA’s goals and objectives, and ways to contact your Board members.
- **Line neighborhood streets with yard signs** (found in the [Membership Marketing Templates and Tools](#) on PTA.org).
- **Hang a “Join PTA” banner** (also found in the [Membership Marketing Templates and Tools](#) on PTA.org) at the entrance of the school, library, or other community center.

Dig Deeper:

- Sample Membership Plan
- Template Member Benefit Letter and Card
- Template Membership Flier
- Template Membership Event Flier
- Template PTA Calendar
- Template Social Media Tools

Membership Forms

Your membership form is an important recruitment tool. An effective form will:

- Give options for support;
- Be focused on PTA’s mission and transparent about your objectives;
- Highlight key member benefits; and
- Offer an online option for easier member sign-up and tracking.

Suggested Timeline

Back to School Time (August–September)

- Send membership packets home.
- Have a membership table at all orientation and back-to-school events.
- Include reminders in your school and classroom communications to families during the first several weeks. This is especially helpful for families who are new to the school.
- Design a visual representation of your growing membership (e.g., an illustration of a tree to which leaves with new member names can be added, or a jar to which beans, marbles, or ping pong balls can be added) for display in your school or in a public place within your community.
- Connect with the grandparents in your community as they join your campus for National Grandparents Day each September.
- Offer an incentive for joining such as a lanyard, school spirit wear product, or a “hometown favorites” discount card.
- Host a breakfast with teachers and share your plans for the year. Ask them to join PTA in support. If at a school, ask your school principal to be the first to join.

Monthly

- Set up your membership table at every PTA, school and community event.
- Make time to welcome or thank PTA event attendees and let them know the event was made possible by PTA membership support.
- Promote why it’s so important to support your PTA as a member in your e-newsletter, social media or on community bulletin boards or websites.
- Publish your current membership count each month and compare it to your goal.
- Show members how PTA advocacy at the state and national levels connect to what is happening in your classrooms and community.
- Recognize the PTA volunteers who are supporting programs and events.

Mid-school Year

- Promote the accomplishments of the fall and preview what’s to come in spring.
- Re-distribute membership packets.
- Host an event for new families.
- Promote a drawing for free spirit wear or other benefit (i.e. Principal for a Day, special parking spot) for all members who join by a certain date.
- End of school year.
- School’s out! Recognize PTA volunteers at a luncheon or special school assembly.
- Send a survey to gain feedback for the upcoming year.
- Introduce your leaders for the coming school year and ways to share feedback for them as they plan over the summer.

Member Renewal

Membership renewal is important to ensure the vitality of PTA. Recruitment introduces members to PTA benefits, but renewal helps us to determine how well we meet our members' needs. A returning member who sees the value and impact of PTA can be your best asset for recruiting new members. Returning members are also more likely to take on leadership roles.

Dig Deeper:

- [Welcome to PTA Email](#)
- [Mid-Year Status Email](#)
- [Renewal Letter](#)

Renewing Members

Planning for membership renewals is an important part of achieving annual membership goals. It takes more effort to recruit a new member than it does to keep an existing one, but member engagement and retention is a year-long process.

Tips:

- **Track your PTA members to find your renewal average.** How long do members remain active with your PTA? One year? Two years? Three or more years? Then, set a membership renewal goal as part of your marketing plan.
- **Survey your renewing members** to determine whether your PTA is meeting their needs. Talk to members who do not renew. What are their reasons? What can your PTA do to earn them back?
- **Communicate all year long.** Be sure that members know what the PTA is doing and when events are happening. If members feel connected they will be more likely to rejoin.
- **Make personal contact** as much as possible, whether by phone or catching up at school.
- **Offer members a variety of opportunities** to participate in PTA. Provide programs that will support and be of value to families. Offer volunteer opportunities that vary in time commitment and skill level.
- **Send membership renewal forms to PTA members at least one month before the end of the school year.** Cite your successes for the year, thank members for their support and ask them to join again for next year.
- **Host an annual PTA membership renewal event** and celebration.

Recognizing and Thanking Members

A simple “thank you” can go a long way. Recognizing your PTA members’ contributions to your unit goals is an important part of membership retention. Show them you appreciate their dedication to making every child’s potential a reality in your community.

Suggestions:

- **Host a volunteer appreciation event** at least once a year to recognize PTA members who have actively engaged in PTA events and championed your goals. Give certificates and public thanks for their work.
- **Send thank you emails/letters** to new and returning members, reminding them of PTA benefits and ways to stay connected and engaged throughout the year. One option: Have students write thank you notes and attach them to membership cards.
- **Host "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 ice breaker along with light refreshments and a simple ‘thank you’ message from your PTA.
- **Recognize members for returning: two years, five years, etc.** This could be as simple as a “Welcome Back” card for two-year members, recognition in the newsletter/PTA website, or a lapel pin for long-term members.
- **Offer a door prize** to members (not just attendees) at your PTA meetings.

Tracking and Reporting Membership

Your unit should maintain an accurate list of members to determine who is eligible to vote at meetings. Good record-keeping is also crucial for your recruitment and retention efforts. It will help you keep track of members, dues payments, and mailings.

If possible, use a membership database system with an online marketing or email tool. Email allows you to communicate with members who are not able to attend meetings or spread the word about new member benefits.

Tracking Dues

The Membership Chair should work with your PTA Treasurer to ensure that the state and National PTA portions of [membership dues](#) (as well as district and council dues, where relevant) are tracked properly and forwarded in a timely manner to the appropriate association.



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