



MEMBERSHIP GUIDE

2007 - 2009

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Dear Membership Chairman:

Congratulations, and welcome to one of the most important positions in the PTA! You have been chosen because your local PTA officers believe you are a good salesman, enthusiastic about the PTA, and able to work well with others.

To be an effective membership chairman, you will need the cooperation and support of every officer, chairman, and member of your local PTA. You will need to have a working knowledge and understanding of the PTA's programs, projects, and activities in order to sell the PTA to those members who are not as active as they might be.

This Membership Guide is designed to help you by providing guidelines, procedures, general information, and a suggested calendar. This Guide is a valuable tool designed to assist you and your committee. You will find a sample of each form you will need to complete this membership year, with specific instructions and tips to make the process easier.

If you need any assistance, please do not hesitate to contact your county membership chairman, your county president, or the NJPTA membership committee chairman.

Additional membership information is contained in the PTA Membership, Quick-Reference Guide and Membership Marketing Templates and Tools CD, both provided by National PTA. A copy of this publication was given to your local PTA president. If you have not already received a copy this guide or CD, please ask your president to provide a copy to you. Between these three resources, the membership enrollment process should be a smooth one.

If you have any questions, comments, or suggestions, please contact the NJPTA office at (609) 393-6709.

We wish you great success in recruiting new members!

New Jersey PTA
Membership Committee

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JOB DESCRIPTION – MEMBERSHIP COMMITTEE CHAIRMAN

The membership chairman is responsible for retaining, promoting, and increasing PTA membership at the state and local level, giving everyone the opportunity to participate.

The chairman should:

1. Coordinate and direct the activities of the membership programs, as charged by the bylaws and/or standing rules;
2. Plan and conduct membership enrollment efforts with clear, numerical goals;
3. Prepare a budget for the upcoming year; (postage, printing)
4. Be responsible for the distribution of, and accounting for, membership cards;
5. Maintain accurate membership records. The preferred method is to number the membership cards and to keep an alphabetical listing of the members' names. A list of members should be present at every meeting of the association. The treasurer and recording secretary are to have a copy of the membership list. Membership is ongoing so make sure this list is updated periodically;
6. Receive membership dues. Money is to be counted by two people and given to the treasurer on a regular basis, once or twice a week in the beginning of your membership drive. If you collect dues at a meeting, count the money with another member of your committee and give it to the treasurer before you leave the meeting. **DO NOT HOLD ON TO THE MONEY – GET IT TO YOUR TREASURER.** Work with the treasurer to ensure that membership dues are forwarded to and received by the NJPTA office no later than November 1, January 1, March 1, and June 1;
7. Be aware of membership trends;
8. Apply for NJPTA membership awards;
9. Disseminate information provided by the State and/or National PTA;
10. Return unused and voided membership cards to the NJPTA office by June 1. Unreturned cards, **including those that are voided**, are assessed a charge at the prevailing membership rate. Your local PTA is responsible for payment of any unreturned membership cards;
11. Maintain a procedure book that includes copies of the membership list, reports, job description, plan of work, and recommendations to your successor;
12. Celebrate your success!

PERTINENT FACTS FOR THE MEMBERSHIP CHAIRMAN

- Membership cards will be mailed to every eligible PTA in good standing in July. The cards need to be counted **immediately** upon receipt to verify that the number received is the same amount reported on the mailing label of the package. The Membership Card Verification Report **MUST** be completed and submitted to the NJPTA office **WITHIN TWO WEEKS** of receiving the membership cards. Remember, your PTA is responsible for the amount of cards listed on the label if a discrepancy is not reported within two weeks of receiving the cards.
- PTA Membership cards are now formatted on an 8 ½ x 11 sheet. There are 10 cards per sheet for ease of use when printing. National PTA has provided a template for use in preparing your membership cards. Please contact National PTA at 1-800-307-4PTA with questions regarding the template.
- Please remember when issuing your cards that **all memberships expire on September 30 of the next school year**.
- Be sure to fill in your local PTA number on each membership card **before** sending the card to the member. If a mistake is made when completing a card, mark the card “void”, and return it to the NJPTA office with any other unused/unsold cards at the time you complete the Enrollment Breakdown and Unused Membership Cards Report at the end of the year. This form and all unused/unsold and voided cards are due at the NJPTA office by June 1. **ALL VOIDED AND UNUSED CARDS MUST BE RETURNED NO MATTER WHAT CONDITION VIA RETURN RECEIPT WITH SIGNATURE CONFIRMATION**.
- The State and National portion of the dues must be paid for every member. The records for National and State portions of membership dues should be kept separate from records of the general funds. The local PTA determines the local portion of dues (see local PTA bylaws).
- Upon payment of dues, each person becomes a member of the local, State, and National PTAs. Each person who joins the PTA should be given a membership card. There should be **no** family or joint memberships. Remember, one card = one name = one vote.
- A Dues Remittance Form **must** accompany the payment of dues to the NJPTA office. Work with the treasurer to accurately complete this form. Be sure to calculate your dues payment accurately. **Once the NJPTA office deposits your submitted payment, no credits or refunds will be issued.** Dues payments deadlines are November 1st, January 1st, March 1st, and June 1st. Payments must be received **on or before** these dates.
- The membership chair should compile an alphabetical list of members. One copy should be given to the recording secretary and one to the treasurer. The list should be updated periodically as additional dues are collected.
- The list serves a two-fold purpose. It is a list of the voting body of the organization, and it's a verification of the money collected and forwarded to NJPTA.
- Remember that only those who have paid dues for the current year have the privileges of discussion, making motions, voting, or holding office. This list is vital during elections – only people who have been members for 15 days can vote.

TEN STEPS TO RECRUITMENT & RETENTION SUCCESS

1. Define your prospects, and identify your target markets.
2. Evaluate your PTA. Review membership trends from previous years.
3. Set your goals, your timetable, and your budget;
 - Identify the number of new members to be achieved;
 - Identify the number of current members to be retained;
 - Identify the required timetable and budget to meet your goals.
4. Train your recruiters.
 - Set up a volunteer recruitment and retention committee.
5. Make personal contact a priority.
 - Encourage face-to-face contact.
6. Follow up immediately.
 - Send out follow-up letters and/or conduct face-to-face follow up.
7. Sell the value of PTA membership..
 - Use key resources (e.i., “Help Your Child, Join The PTA” brochure).
8. Recognize all efforts.
 - Acknowledge volunteer participation.
9. Retain your members.
 - Make sure to thank and recognize your current members.
10. Monitor and evaluate your results.
 - Track your efforts;
 - Identify successful programs for future use.

INSTRUCTIONS FOR COMPLETING MEMBERSHIP-RELATED FORMS

The following information relates to the various forms that the membership chairman is required to complete during the course of the school year. Each of these forms is provided to your local PTA president at the beginning of the school year, in the same package in which the membership cards were sent. These forms were designed to ensure that the NJPTA office is able to accurately and timely record your membership information. Accurately completing and submitting these forms also assists the office in its ability to answer any questions you may have throughout the year in regard to your PTA's membership activity.

The forms that have been produced are not intended to create "more" administrative responsibility, but rather to ensure that your PTA is properly credited for the amount of hard work performed by your association throughout the school year. The completion and submittal of these forms is required of your PTA to receive your PTA packet in July. Please do not hesitate to contact the NJPTA office if you have any questions concerning the information being provided, or if you need additional forms. Forms can be downloaded from our website, www.NJPTA.org.

Membership Card Verification Report

This is the first form required to be completed and submitted to the NJPTA office. The mailing label of the package that contains your cards indicates how many cards are supposed to be included in your package. The number indicated on the mailing label is the number of cards for which your PTA has been invoiced at the time the cards were shipped from the office.

The membership cards need to be counted (preferably by two different people) and verified at the time they are received. Your PTA has two weeks from the date of receipt of the cards in which to file the Verification Report with the NJPTA office. Any discrepancies in the amount of cards received must be reported within that time frame. The Membership Card Verification Report offers you the option to request any "shortage" of cards at that particular time, or to decline having the NJPTA office ship the shortage of cards. If you decline to receive the shortage (believing that you most likely will not need them), the NJPTA office will adjust your invoice to reflect the actual amount of cards that you've verified receiving on the report.

If, at a later date, you discover that your PTA needs more cards than what you have received, you can request that additional cards be sent from the NJPTA office by completing the form entitled "More Membership Cards". The State office will not ship additional cards without receiving the request in writing (by use of the above mentioned form). At the time you are sent additional cards, your PTA account will be invoiced for the additional amount. A sample More Membership Cards form is included for reference at the end of this guide.

It is very important to understand that if your PTA did not receive the amount of cards listed on the mailing label of the package AND did not file the verification report noting the discrepancy, your PTA is responsible for payment of the full amount of cards, which is the amount listed on the label.

This becomes a problem at the end of the school year when you try to reconcile your membership activity for the year. Likewise, if your PTA actually receives more cards than listed on the mailing label AND does not file the verification report noting the discrepancy, your account will not be invoiced properly from the onset of the school year. Again, this is a problem at the end of the year when you reconcile your account. To correct these matters takes more time at the end of the year, which could very well impact your status with the State PTA, and could also delay shipment of future membership cards.

NOTE: Please remember to ALWAYS keep a copy of any forms that are submitted to the NJPTA office for future reference.

A sample copy of the Membership Verification Report form is included for reference at the end of this guide.

Membership Dues Payment Schedule

Carefully complete this form, ensuring that all information is provided. Verify, with the treasurer, the number of members and the money collected. The first dues payment must be received by the NJPTA office on or before November 1st. Please keep in mind the time it takes to mail your information. The second dues payment must be received by the NJPTA office on or before January 1st, the third payment, on or before March 1st, and your final payment, on or before June 1.

Ensure that you give a copy of the payment form to the treasurer and that you retain a copy for your procedure book.

The Membership Dues Payment Schedule form must be submitted to the NJPTA office according to the above schedule. Submitting your dues payments (and forms) are a requirement of good standing.

Ensure that your dues payments are written from your PTA checking account. These payments should not be made from a personal account. Please remember to note your local PTA number in the memo field on your check.

NOTE: Checks received without a completed Membership Dues Payment Schedule will be returned to the sender.

A sample copy of the Membership Dues Payment Schedule is included for reference at the end of this guide.

Enrollment Breakdown and Unused Membership Cards Report

This is the form used to reconcile your membership activity at the end of the school year. All unused/unsold and voided cards need to be returned with this completed form by June 1st. **ALL VOIDED AND UNUSED CARDS MUST BE RETURNED NO MATTER WHAT CONDITION VIA RETURN RECEIPT WITH SIGNATURE CONFIRMATION.**

Your membership enrollment should be open all year, giving every opportunity to recruit members until the last possible minute before you need to mail your form and return your membership cards to the NJPTA office by June 1st.

To complete this report:

Verify with the treasurer the information requested under the ENROLLMENT RECORDS section of the report. Ensure that all dues have previously been submitted to the NJPTA office.

At the end of the school year you are required to reconcile your membership activity. If you properly filed your verification report and your dues remittance forms, you should have no problems with this form. However, should you need assistance in completing this form, please contact the NJ PTA State Office at 609-393-6709.

Common Mistakes

Do not “force” your membership total for the year to agree with the amount of membership cards that you have remaining to return to the NJPTA office. For example, if your PTA received 50 membership cards, and you have in your possession 10 membership cards to return to the NJPTA office, do not “assume” that your membership for the year was 40. In fact, your PTA may have submitted dues for 45 members, but five of your members have not been given their membership cards. This is a common mistake. Your membership totals need to be verified with your treasurer to ensure that your PTA has submitted the correct amount of dues in comparison to the number of members you have reported.

You’ll need to first calculate the amount of cards that you should have remaining to return to the NJPTA office, according to your membership list, and then physically count the cards to verify that you, in fact, have this many cards to return. Any other method used to reconcile this report will most likely lead to errors in your actual membership total for the school year.

Points to Remember

This form should not be completed, and cards should not be returned to the NJPTA office until the end of your membership year or June 1st.

Your “final” payment is due on or before June 1st. This is separate from the Enrollment Breakdown form, which is also due by June 1st. Your PTA should be submitting a payment form four times throughout the year, before the deadline dates of November 1, January 1, March 1st, and June 1st. You may submit more frequent payments if necessary. **REMEMBER**, these are deadline dates. You may submit monies prior to those dates. Please include a dues payment form (you may make copies of this form) with all payments, so that your local PTA receives proper credit.

The Enrollment Breakdown and Unused Cards Report form should not be used to submit dues payments. Dues payments submitted with this report will be returned to the sender to have the proper form completed.

The NJPTA office encourages you to send your Enrollment Breakdown form and your unused/unsold, voided cards via “certified mail – receipt requested”. It may cost a little more; however, if for any reason the NJPTA office does not show record of receiving your returned cards, and you have not taken that extra step to show proof of receipt, the balance on your account will remain your PTA’s responsibility.

Remember, your PTA account is “credited” the prevailing membership rate for each returned card.

A sample copy of the Enrollment Breakdown and Unused Membership Cards Report form is included for reference at the end of this guide.

MEMBERSHIP AWARD APPLICATIONS

Your local PTA president was mailed a set of membership award applications at the beginning of the school year in the same package in which your membership cards arrived. If you have not been given these applications, please ask your president to provide them to you. Because awards change from year to year, you must submit the current award application to be eligible. Award applications can be obtained from the NJPTA office if you are unable to locate them through your president.

PLEASE complete each form carefully. The certificates are printed with the information that appears on the application.

You may make copies of the current year forms as needed. It is advisable to send in a form when you reach that level of membership. For example, when you achieve 100% Teacher Membership, send in the form to the NJPTA office. When you reach 10% or more increase, send a second award application to the NJPTA office.

Apply for NJPTA awards. We want to celebrate your successes and recognize your efforts to increase the membership of your PTA.

Mail one copy of the application form to your county membership chairman, and mail the original form to the following address:

NJPTA
900 Berkeley Avenue
Trenton, NJ 08618

Each county has a membership chairman. If you have any questions or difficulties, the county chairman can be a valuable resource. This creates a system of checks and balances for the state and county chairmen.

NEW JERSEY PTA
MEMBERSHIP CARD VERIFICATION REPORT
FOR 2007-2008 YEAR

THIS FORM MUST BE COMPLETED.
PLEASE MAIL OR FAX TO STATE OFFICE.

Upon receiving your Local PTA mailing containing your membership cards for the 2007-2008 year, please be sure to verify the card count before relinquishing them to your general membership.

The amount of cards received should equal the number listed on the label of the package that contained the membership cards. The package was addressed to your local PTA President.

If you no longer have access to the label from that package, the NJ PTA State office can verify the same information that was listed on the package label. Contact the NJPTA Office at (609) 393-6709.

Local PTA # _ _ _ _ _

County: _____

Local PTA Name _____

Membership Chair _____

Address _____

City _____ State _____ Zip Code _____

Daytime Phone Number (_____) _____

MEMBERSHIP CARD COUNT LISTED ON LABEL _____

MEMBERSHIP CARD COUNT VERIFIED BY LOCAL PTA _____

(*If you received **less** than the amount listed on your label, please indicate if you want the difference in cards mailed to you at this time.) YES _____ NO _____

Please verify the information above. This form will be used to adjust your records should there be a discrepancy. If you do not complete and return this report within ***two weeks*** of receiving your cards, **adjustments will not be made to your account concerning the amount of membership cards originally received.**

Mail this report to: **New Jersey PTA**
900 Berkeley Avenue
Trenton, NJ 08618

MS ACCESS _____

New Jersey PTA More Membership Cards

If you have sold, or anticipate selling, more cards than have been provided to you, please fax or mail this request form to the State Office. Sorry, but additional requests will not be honored via telephone.

Date: _____

PTA Name: _____

PTA Number: _____

County: _____

Send _____ (minimum of 70 cards)

Send to: _____
Membership Chairperson

Address _____

City _____

State _____ Zip _____

Day Phone # _____

(For Office Use Only)

Cards Mailed on: _____

Access: _____

Cards Mailed by: _____

Balance: _____

2007 - 2008 MEMBERSHIP DUES PAYMENT SCHEDULE

MAKE CHECKS PAYABLE TO:

New Jersey PTA
900 Berkeley Avenue
Trenton, NJ 08618

PLEASE REMIT PAYMENTS BY

- November 1, 2007
- January 1, 2008
- March 1, 2008
- June 15, 2008 (Additional Enrollment)

Your canceled check will be your receipt

****Please use Enrollment Breakdown Report to submit unused/voided cards, not this form****

Always give EACH INDIVIDUAL MEMBER one (1) membership card as a receipt for their dues. National PTA and New Jersey PTA do not recognize "Family Membership".

LOCAL PTA # _____

LOCAL PTA NAME: _____ COUNTY _____

TREASURER: _____

Address: _____

City: _____ State _____ Zip Code _____

Daytime Phone () _____ - _____ Evening Phone () _____ - _____

Fax () _____ - _____ Email: _____

SAMPLE

MEMBERSHIP: _____

Address: _____

City: _____ State _____ Zip Code _____


Daytime Phone () _____ - _____ Evening Phone () _____ - _____

Fax () _____ - _____ Email: _____

_____ NEW Members Enrolled (since last scheduled payment)

@ \$3.50 each = _____ (\$1.75 National PTA Dues and \$1.75 New Jersey PTA Dues)

Please compute your membership dues carefully. NO REFUNDS OR CREDITS WILL BE ISSUED!

 REMEMBER...Submit a payment only for the amount of cards you have physically sold! Do not submit a payment for cards "in advance" of actual sale. Your statement will reflect outstanding cards until payment and/or returns are received at state office. All dues payments to the NJPTA office require a completed Membership Dues Payment Schedule Form. Payments cannot be processed without this form and may otherwise be returned to the attention of your president. **Unused and/or voided cards are to be returned by June 1, 2008 using the blue Enrollment Breakdown and Unused Membership Cards Report, NOT this form.**

OFFICE USE ONLY

Check #	_____	Account Balance	_____
Date Received	_____	MS ACCESS	_____
Amount Received	_____		

2007-2008 ENROLLMENT BREAKDOWN AND UNUSED/VOIDED MEMBERSHIP CARDS REPORT

This form should NOT be used to submit dues payments

Local PTA # _____ County _____

Local PTA Name _____

Treasurer _____

Address _____ City _____ State _____ Zip _____

Daytime Phone Number (____)____-____ Fax Number (____)____-____

Membership Chairperson _____

Daytime Phone Number (____)____-____ Fax Number (____)____-____

Address _____ City _____ State _____ Zip _____

ENROLLMENT RECORDS:

Total Number of Members Enrolled as of November 1 _____

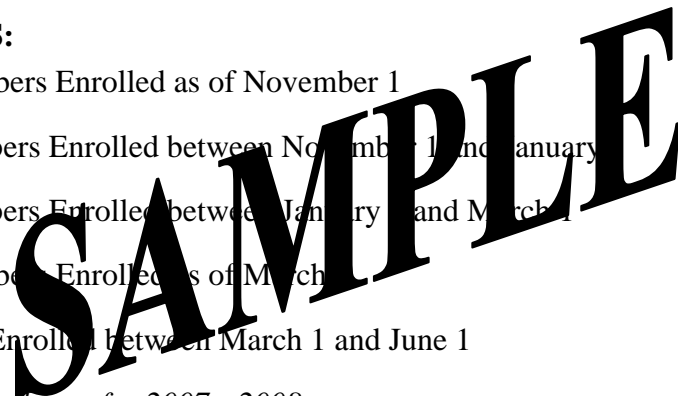
Number of **New** Members Enrolled between November 1 and January 1 + _____

Number of **New** Members Enrolled between January 1 and March 1 + _____

Total Number of Members Enrolled as of March 1 = _____

Additional Members Enrolled between March 1 and June 1 + _____

Total Membership Enrollment for 2007—2008 = _____



UNUSED MEMBERSHIP CARDS INFORMATION:

Number of Cards Received in Fall _____

Number of **Additional** Cards received from State Office + _____

Total Number of Cards Received = _____

Total Membership Enrollment for 2007—2008 - _____

(Ensure that you have submitted dues payments for all members enrolled before returning unused cards)

Number of Cards to be Returned = _____

Please include this report when returning unused/voided membership cards to the State PTA. All local PTAs should return *all unused/voided membership cards* to the State PTA by **JUNE 1, 2008. Your statement will reflect an outstanding balance until payment and/or returns are received at the state office.

Return This Report To: New Jersey PTA
900 Berkeley Ave
Trenton, NJ 08618
609-393-6709

MS ACCESS: _____
Credit: _____ Balance: _____

Please mail: **Return Receipt Requested**

**NEW JERSEY PTA
MEMBERSHIP EARLY BIRD AWARD 2007/2008**

Eligibility at time of submission: - Bylaws up-to-date - Dues payment current - Membership Verification form on file - Audit report for 2006/2007 on file - Payment of at least 85% of prior year's membership dues paid by November 1, 2007.
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***SUBMIT THIS APPLICATION BY NOVEMBER 1, 2007.
YOU MUST BE A PTA IN GOOD STANDING.***

Local PTA # _____ County _____

Proper Title of Local PTA _____

Street Address _____

Town _____ Zip _____

Name of Local Membership Chairman _____ Phone # _____

Name of Local President _____ Phone # _____

Name of County Membership Chairman _____ Phone # _____
(Contact your County President for the proper individual)

Address _____ Town _____ Zip _____

Submit this application to Membership Chairman: New Jersey PTA
900 Berkeley Avenue
Trenton, NJ 08618-5322

Also send a copy to your County Membership Chairman

APPLICATION DEADLINE - NOVEMBER 1, 2007

.....
FOR OFFICE USE ONLY

Date Local PTA Bylaws Approved _____ Date Audit Report Filed _____

Dues Paid on Nov 1, 2007 \$ _____ Total Dues Paid 2006/07 \$ _____

Membership Verification Form Filed _____

Verified by _____ Certificate Prepared by _____ Date _____

**NEW JERSEY PTA
2007/2008 MEMBERSHIP AWARD APPLICATION**

Please print or type information accurately.

Local PTA Number _____ County _____

Proper Title of Local PTA _____

Address _____ Town _____ Zip _____

Name of Local PTA Membership Chairman _____ Phone # _____

President _____ Phone # _____

Name of County Membership Chairman _____ Phone # _____

Address _____ Town _____ Zip _____

**YOU MAY APPLY ANYTIME BEFORE JULY 15TH 2008 FOR ANY OR ALL OF THE
FOLLOWING AWARDS
MAKE COPIES OF THIS FORM AS NEEDED**

100% Membership

Number of Students Enrolled _____ Number of Families _____

PTA Membership Enrollment _____

(100% Membership means that each family has purchased a membership in your Local PTA)

10% or More Increase in Membership

Last year's Membership Enrollment _____ School Enrollment _____

This year's Membership Enrollment _____ School Enrollment _____

YOU MAY NOT USE APPROXIMATE NUMBERS FOR SCHOOL ENROLLMENT

100% Teacher Membership

Number of Full Time Teachers Employed _____ Number Enrolled in PTA _____

(Full time does not include teachers who are shared with other schools; i.e. Art and Music teachers)

YOU MUST FILL IN ALL BLANK SPACES ON EACH AWARD YOU ARE APPLYING FOR

Please submit to Membership Chairman at: New Jersey PTA
900 Berkeley Avenue
Trenton, NJ 08618

Also send a copy to your County Membership Chairman

FOR OFFICE USE ONLY:

Date Local Bylaws Approved _____ Date Audit Report Filed _____

Date Dues Paid _____

Membership Verification Report Filed _____

Verified by _____ Date _____

Certificate prepared by _____ Date Mailed _____

**NEW JERSEY PTA
2007/2008 MEMBERSHIP
OAK AWARDS APPLICATION**
"From a tiny acorn, grows a mighty oak."

Please print or type information accurately.

Local PTA Number _____ County _____
 Proper Title of Local PTA _____
 Address _____ Town _____ Zip _____

Name of Local PTA Membership Chairman _____ Phone # _____
 President _____ Phone # _____

Name of County Membership Chairman _____ Phone # _____
 Address _____ Town _____ Zip _____

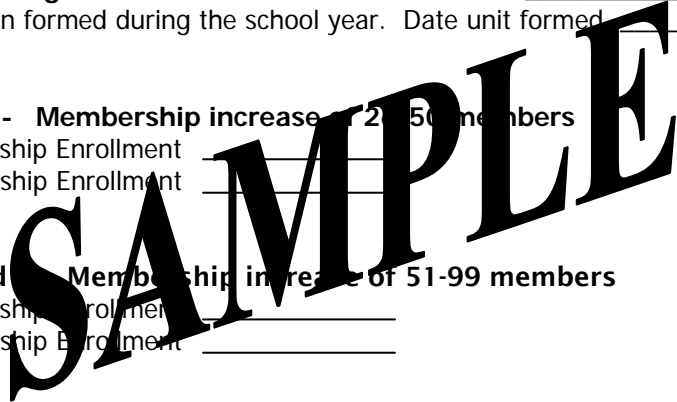
**YOU MAY APPLY ANY TIME BEFORE JULY 15, 2008, FOR ANY OR ALL OF THE
FOLLOWING AWARDS
FOR WHICH YOU QUALIFY. MAKE COPIES OF THIS FORM AS NEEDED**

Acorn Award - Largest new unit. Number of Members _____
 Unit must have been formed during the school year. Date unit formed _____

Red Oak Award - Membership increase of 21-50 members
 Last year's Membership Enrollment _____
 This year's Membership Enrollment _____

White Oak Award - Membership increase of 51-99 members
 Last year's Membership Enrollment _____
 This year's Membership Enrollment _____

Mighty Oak Award - Membership increase of 100 or more members
 Last year's Membership Enrollment _____
 This year's Membership Enrollment _____



YOU MUST FILL IN ALL BLANK SPACES ON EACH AWARD YOU ARE APPLYING FOR

Please submit to Membership Chairman at: New Jersey PTA
 900 Berkeley Avenue
 Trenton, NJ 08618

Also send a copy to your County Membership Chairman

FOR OFFICE USE ONLY:

Date Local Bylaws Approved _____ Date Audit Report Filed _____
 Date Dues Paid _____
 Membership Verification Report Filed _____

Verified by _____ Date _____
 Certificate prepared by _____ Date Mailed _____

