



Membership Record-keeping: Track, Maintain and Recruit New Members

Keeping accurate membership records is not only important but can help your local unit manage their membership campaign.

Creating a spreadsheet with important data can help you keep accurate records and track your membership. Possible information collected:

- Adult member name(s)
- Student member name(s) if a PTSA
- Contact Information- Address (optional)
 - E-mail Address
 - Home or Cell Number (if you offer text reminders)
- Student name(s), Grade(s), Teacher's Name(s)
- New Member or Renewal
- Date Joined

If you take online memberships, you may be able to create or access reports from the program used.

If you use paper forms but want this data but lack the time or experience with spreadsheets, ask other PTA parents or staff members to assist with the inputting of information and creation of reports.

Other Important documents to help you contact PTA leaders, staff, and past members:

- PTA Executive Committee list (*membership required*)
- PTA Committee Chairman List (*membership required*)
- School Staff List (teacher, administration, support staff)
- Room Representative/Room Parent list
- Past year's PTA Membership List

Reports that can help track membership:

- New member or renewal
- By grade level
- By teacher (if doing class incentives)
- By date (month)

Reminder: PTA member contact information is for PTA purposes only. It is not to be released to any outside entity for any reason. We need to be respectful that some families wish to keep their contact information personal private and not share it.



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Ways to use membership lists to help you track, retain, and grow your membership-

- **Renewal of past members: Send a note or e-mail with a membership form to those that have not renewed their membership.** *“Name of PTA values their past support and asks them to continue to support the programs and resources that benefit all name of school’s children & families through PTA Membership.”*
- **PTA Elected Officers and Committee Chairman.** Use membership lists to send reminders to PTA leaders to join or renew membership. *“We are all working for our children and families at name of school. Please don’t forget to turn in your membership form and dues payment.”*
- **Use membership lists to track staff and community members.** *“As a community member you can help our local unit support programming not only in our school but also on a state and national level. If you would like to get information about our programs, we would be happy to add you to our e-mail or e-newsletter lists”.*

Track and evaluate if there is a difference in membership numbers from year to year.

Is there a decline? Are people not renewing? If so, why? Did we do something different? Are we explaining what we do and why? Are we sharing the Successful programs of the PTA?

Are new people joining? Are people joining from all grade levels? If so, what made them join? If not, how can we reach them?

When are people joining? Is it just in August/September? Or are we recruiting members all year long?

These ideas are just a springboard to get you thinking about how you approach your membership campaign and documentation. Use the data you collect to help with your membership campaign all year long.



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