



Just Getting Started: First Steps for a Successful Chapter

Your Petition for Establishing a Chapter has been accepted and you have been assigned a chapter name. *How should you proceed to build a thriving chapter?*

- 1) **Send a letter to all eligible students** who meet the membership criteria, as outlined in the PTE Chapter Standard Operating Procedures. After receiving the letter, students should complete a **membership application** and supplemental materials (a scholarly article and a brief paragraph on why they are interested in joining Pi Theta Epsilon) and send to the Review Board.
- 2) **Review the membership applications** that have been completed via the Review Board. This group is comprised of the PTE chapter president and any TWO of the following individuals: a) the chapter advisor, b) an alumni member, c) a member of a local support chapter, and/or d) a faculty member of the OT program not affiliated with PTE.
- 3) After a student is approved by the Review Board, send an **invitation to the induction ceremony** for students. A sample letter is available on the PTE website at www.aotf.org.
- 4) **Track dues payments from students** in the **Annual Dues Membership Form*** and send the form with payments to the National Office, *even if payments were made online*. Upon receipt, the PTE National Office will mail a certificate and membership card for each student. Note: this process may take up to three weeks upon receipt for your chapter to receive the certificates. Please consider this in the timeline of your induction ceremony. **The membership form must be completed once a year for your chapter to be listed as active.*
- 5) **Host your induction ceremony!** While chapter officers are normally involved in the planning and running of the induction ceremony, advisors take a lead role in the initial ceremony at the school while officers are elected.
- 6) **Plan your first chapter meeting, and elect officers!**
- 7) Officers can begin organizing **additional meetings and PTE events**. Note, a minimum of one meeting must be held each semester.
 - a. Take a look at the **PTE Calendar of Events** to share information with your chapter on: deadlines for AOTF and PTE scholarships, events like the PTE Alumni Reception at the AOTA Annual Conference, the Annual Business Meeting and Special Presentation at NBCOT/AOTA Student Conclave, and more!
 - b. Read the **“Sample Chapter Activities and Fundraising Ideas”** guide to gain ideas on special events that you can host at your local chapter.
- 8) PTE National encourages that each chapter **send a delegate to the Pi Theta Epsilon Annual Business Meeting**, held in conjunction with the AOTA/NBCOT Student Conclave event.
- 9) Faculty Advisors should plan to attend the **PTE Faculty Advisor’s workshop** at the AOTA Annual Conference.

Please refer to the PTE Chapter in a Box and the PTE website at www.aotf.org for more information, or contact the PTE National Chapter at pte@aotf.org or (240) 292-1077 if you have any questions!