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](http://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](http://www.aotf.org) for more information, or contact the PTE National Chapter at [pte@aotf.org](mailto:pte@aotf.org) or (240) 292-1077 if you have any questions!