



# RETENTION and REACTIVATION FACT SHEET

Each membership year, local PTAs must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have “Active Affiliation” means that the Local Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes ten items which are detailed later in this section. Email the complete report by **October 28, 2022** to [afiles@LouisianaPTA.org](mailto:afiles@LouisianaPTA.org). Local PTAs that do not maintain Active Affiliation will be subject to the Retention Plan. Information on the Active Affiliation Report is available at [LouisianaPTA.org](https://LouisianaPTA.org) under *Run Your PTA* menu.

## WHAT IS THE RETENTION PLAN?

If a Local Unit fails to submit the Active Affiliation Packet (the yearly requirements to maintain its IRS status and PTA affiliation) then the Retention Plan is initiated by LAPTA. The Retention Plan assists units in returning to an Active Affiliation status. The goal of the LAPTA Retention Plan is to support Local Units and to make the process as easy as possible. LAPTA recognizes that some PTA’s unit leadership might inherit a PTA not in compliance and are usually not familiar with the requirements of Active Affiliation themselves. Communication is key. Local Units will not be “in trouble” or scolded, but rather LAPTA welcomes the efforts and is eager to get Local Units back in the fold.

**Local PTA Retention Plan is initiated when a Local PTA does not maintain Active Affiliation.** When a Local Unit fails to submit the yearly requirements Active Affiliation status, then LAPTA has the “Retention Plan” to get units back on track and to make the process as easy as possible. LAPTA recognizes that some PTAs might inherit a PTA not in compliance. Communication with LAPTA is key. Local Units will not be “in trouble” or scolded, but rather LAPTA welcomes their efforts and is eager to get Local Units back to Active Affiliation status.

- 1. Notification:** After the deadline passes to file the Active Affiliation Packet, LAPTA will notify the PTA of the actions required to obtain Active Affiliation Standing. The PTA will have 30 days, from the date of the notification, to meet all requirements to avoid moving into the Restriction Phase.
- 2. Restriction:** After 30 days without proper submission, the PTA has a second 30-day period to submit the report and are additionally not eligible for awards, programs, or grants administered by LAPTA or National PTA.
- 3. Restructure:** After 60 days without proper submission, LAPTA may choose to restructure the leadership of the PTA. However, a PTA may sign a “Plan of Action” to avoid the Restructure Phase and move into the Intervention Phase. If no Plan of Action is implemented, then the PTA will move into the Dissolution Phase after a reasonable amount of time. The PTA will continue to be ineligible for awards, programs, and grants administered by LAPTA and National PTA.
- 4. Intervention:** In the Intervention Phase, LAPTA assigns a support team to assist the PTA with their Plan of Action. If all requirements of the Plan of Action are not resolved by the agreed-upon date, the PTA will be moved back into Restructure Phase. With cause, LAPTA may place a Local PTA that has not met all Active Affiliation Requirements into the Intervention Phase early.
- 5. Dissolution:** If a Local PTA fails to maintain Active Affiliation for three consecutive years, LAPTA may revoke its charter. The IRS terminates its 501(c)(3) status when taxes aren’t filed for three consecutive years. The Local PTA must cease and desist further use of the PTA name. Bank accounts must be closed with any remaining funds donated to a PTA. See [LouisianaPTA.org](https://LouisianaPTA.org) for details.

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## REACTIVATION PHASE

For Local Units that have had their non-profit status revoked by the IRS for not filing their taxes for three years, LAPTA is here to help. First, contact LAPTA at [office@LouisianaPTA.org](mailto:office@LouisianaPTA.org). It is recommended that you apply online for a new EIN with the IRS with a new PTA unit name. Complete the **Reactivation of an Existing PTA**. LAPTA will work with your unit leadership in achieving Active Affiliation.



# ACTIVE AFFILIATION: PLAN OF ACTION

For Local Units in the Restructure or Reactivation Phase, contact LAPTA at [afiles@LouisianaPTA.org](mailto:afiles@LouisianaPTA.org) to discuss your situation. Complete the Plan of Action Form to work toward Active Affiliation status. After speaking with LAPTA, note the new deadline for each item. Fill in the submission date when the item is emailed to LAPTA.

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Local Unit Name	Parish	Local Unit LUR#	Date
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**CHOOSE all that apply.** Note the date for each item after speaking with LAPTA officer.

Active Affiliation Report was incomplete because:

- Active Affiliation Cover Page was not completed.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- A minimum of 30 LAPTA membership dues was not submitted.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- Board data was not submitted to LAPTA at [LouisianaPTA.org/submit-officer-data-1](http://LouisianaPTA.org/submit-officer-data-1).  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- Bylaws are outdated.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- IRS taxes were not filed.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- Local Budget Approval Form with the Approved Budget was not filed.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- Audit Committee Report was not filed.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- Active Articles of Incorporation with LA Secretary of State were not filed.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_
- Proof of PTA Leadership Training for all elected officers was not filed.  
 New deadline: \_\_\_\_\_ Emailed to LAPTA Date: \_\_\_\_\_

**When submitting the above items, include this Plan of Action form.**

*I, the authorized representative of the Local PTA Unit, hereby agree to the above Plan of Action to acquiring Active Affiliation.*

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Local Unit President's Signature	Date	Local Unit President's Name
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President's Email	President's Phone
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LAPTA Officer's Name

**Email the completed form to [afiles@LouisianaPTA.org](mailto:afiles@LouisianaPTA.org).**