



LAPTA ToolKit

2022 - 2023



LAPTA Office & PTA Basics

2022 – 2023

Section 1

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LOUISIANA PTA OFFICE

All Local PTA Units in Louisiana are affiliates of Louisiana PTA (LAPTA) and National PTA. The Louisiana PTA Board of Directors serves as a resource and support for local units. Thank you for joining PTA as we work to make a difference in our communities. PTA focuses on making every child's potential a reality by strengthening education and taking a comprehensive approach to community success.

Louisiana PTA
1131 N. Causeway Blvd. Suite 306
Mandeville, LA 70471
LouisianaPTA.org
office@LouisianaPTA.org

WHAT DOES LAPTA DO?

- Advocates for children at the local, state, and federal levels.
- Makes every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- Assists local units in building community through programs that promote student achievement, creativity, and inclusiveness.
- Ensures members of Louisiana Local PTA Units:
 - Have the same purposes and principles as National PTA.
 - Operate according to National PTA's vision, mission, values, and policies.
 - Operate according to National PTA's legislative and advocacy priorities and adopted positions and resolutions.
 - Aids the local units in maintaining compliance with National PTA, LAPTA, and IRS rules and requirements.
 - Forwards the National PTA dues portion from Local PTA Units' dues submitted to LAPTA.
 - Represents all Louisiana PTA members by participating in and voting at the National PTA Convention and National Legislative Convention.
 - Hosts LAPTA Leadership Training in August and privately throughout the year for individual units as needed.
 - Offers LAPTA grants to help fund Local PTA Units in providing engaging, educational, and fun opportunities for children, families, and communities.
 - Assists PTA members if challenges occur in accomplishing the primary mission of their unit.
 - Helps create new PTA units or reinstate unaffiliated units.
 - Implements National PTA Reflections Program and selects and awards state winners.
 - Collaborates with like-minded associations and coalitions supporting children, families, and educators in the state of Louisiana.
- Member of [Louisiana Partnership for Children & Families](#).
- Member of VoterVoice legislative platform.

LOUISIANA PTA BOARD OF DIRECTORS

The LAPTA Board of Directors is made up of volunteers from Local PTA Units across the state. There are volunteer positions currently available. If you are interested in serving at the state level, contact Kayla Pagel.

President: Kayla Pagel, president@LouisianaPTA.org

Serves as the official contact, communicator, and representative of LAPTA. Works with other PTA leaders and other like-minded state organizations to connect families, schools, and community to support student success.

Treasurer: Beth Maillho, treasurer@LouisianaPTA.org

Maintains full account of funds of the association.

Secretary: (Open)

Records and maintains the minutes of all meetings of LAPTA.



VP of Advocacy: Kaionnia Scott, advocacy@LouisianaPTA.org

Promotes national and state advocacy and legislative programs and activities.

LAPTA Historian: Mallory Pell, historian@LouisianaPTA.org

Prepares and updates record of the activities and achievements of LAPTA.

Communications Committee Chair: (Open)

Creates distinctive and credible messaging for LAPTA on social media platforms.

VP of Diversity, Equity, and Inclusion: (Open)

Promotes inclusion, engagement, and full involvement of diverse populations of LAPTA.

VP of Affiliation: (Open)

Oversees approval of the Bylaws and compliance with Local Unit Active Affiliation. All work is done through email.

VP of Arts Education: (Open)

Promotes the importance of arts on education and facilitates opportunities for Louisiana students to engage in and be exposed to a variety of art forms.

VP of Membership: (Open)

Oversees membership initiatives focused on recruitment and retention.

VP of Leadership Development: (Open)

Promotes resources, tools, and programs that support effective and ethical PTA leadership and growth.

Centennial Celebration Special Committee: (Open)

Oversees the LAPTA State Meeting and Centennial Celebration on March 24 & 25, 2023.

Spanish Translation Committee: (Open)

Translates the Bylaws template and other files to Spanish.



To apply for a position, visit <https://form.jotform.com/221844836900054> or scan the QR Code.

LAPTA IMPORTANT DATES AND DEADLINES

July 2022

- July 1 Board position terms begins
- July 15 Submit officer data at [LouisianaPTA.org/submit-officer-data-1](https://form.jotform.com/221816998285068)
- July 25 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- July 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

August 2022

- August 1 Reflections Program opens at [LouisianaPTA.org/reflections-program](https://form.jotform.com/221816998285068)
- August 12 Start working on Active Affiliation Report (<https://form.jotform.com/221816998285068>)
- August 12 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- August 20 LAPTA Leadership Training South for southern Local PTA Units**
- August 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)
- August 27 LAPTA Leadership Training North for northern Local PTA Units**
- August 30 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm

September 2022

- September 1 Review PTA.org and LAPTA ToolKit: Grants for available grants and their deadlines
- September 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- September 21 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- September 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

October 2022

- October 1 Deadline for National PTA.org School of Excellence Submission
- October 9–16 Fire Prevention Week 100th Anniversary & Safety Poster Contest (Pre-K – 6th Grade)
- October 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- October 13 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- October 18 Safety Poster Deadline to Submit Winners (<https://form.jotform.com/221746113272146>)
- October 21 LAPTA Safety Poster Winners Announced
- October 23–31 Red Ribbon Week: “Celebrate Life. Live Drug Free”
- October 28 Deadline for Active Affiliation Report (<https://form.jotform.com/221816998285068>)**
- October 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

November 2022

- November 1 Plan Family Reading Experience Event; visit [PTA.org/home/programs/family-reading](https://form.jotform.com/221748002230038)
- November 4 LAPTA Reading & Literacy Grant Deadline (<https://form.jotform.com/221748002230038>)
- November 8 Election Day – Advocate for all children by voting
- November 10 Reflections Theme Contest Submission Deadline (<https://form.jotform.com/221745830340147>)
- November 10 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- November 14 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- November 25 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)
- November 28 LAPTA Reflections Theme Search Winners Announced

December 2022

- December 1 LAPTA Reading & Literacy Grant Winners Announced
- December 5 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- December 12 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- December 20 Submit new membership dues at [LouisianaPTA.org/membership](https://form.jotform.com/221816998285068)

January 2023

- January 15 Reflections Submission Deadline to LAPTA
- January 17 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- January 20 Deadline for NPTA Legislative Convention (LegCon) Grants <https://form.jotform.com/221776439055159>
- January 25 Submit new membership dues at LouisianaPTA.org/membership

February 2023

- February 1 Newsletter Award Application Deadline (<https://form.jotform.com/221745628447059>)
- February 1 Advocacy Award Application Deadline at LouisianaPTA.org/grants
- February 9 Louisiana PTA’s 100th Birthday
- February 9 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- February 17 National PTA Founders’ Day
- February 17 LAPTA Day of Service Grant Application Deadline (<https://form.jotform.com/221748846538166>)
- February 21 Mardi Gras Day
- February 28 LAPTA National PTA Legislative Convention (LegCon) Grant Winners Announced
- February 28 Deadline for NPTA Convention Grants, Volunteer of the Year Award, and Mentor-a-PTA Award
- February 28 Deadline for Love Louisiana Video Challenge (<https://form.jotform.com/221775295270157>)
- February 28 Deadline for Creative Teacher Grants (<https://form.jotform.com/221796420623152>)
- February 28 Submit new membership dues at LouisianaPTA.org/membership

March 2023

- March 1 LAPTA Reflections Program Winners Announced
- March 2 Read Across America Day (nea.org)
- March 6 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- March 15 Deadline for Membership Reports for use in determining LAPTA Membership Awards
- March 24 & 25 LAPTA Centennial Celebration in Baton Rouge with Children’s Recognition Ceremony**
- March 25 LAPTA General Membership Meeting; Winners of LAPTA Day of Service Grants, National PTA Virtual Convention Grants, Outstanding Newsletter Awards, Love Louisiana Video Challenge, Creative Teacher Grants, and Volunteer of the Year Winners Announced
- March 25 Submit new membership dues at LouisianaPTA.org/membership
- March 27 LAPTA Healthy Minds Grant Application Deadline (<https://form.jotform.com/221748198534162>)
- March TBA Virtual National PTA Legislative Convention (LegCon)

April 2023

- April Transition Time: Planning for the Year Ahead
- April 20 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- April 25 Submit new membership dues at LouisianaPTA.org/membership
- April 28 Submit officer data at LouisianaPTA.org/submit-officer-data-1

May 2023

- May Transition Time: Planning for the Year Ahead
- May 1 LAPTA Healthy Minds Grant Winners Announced
- May 8–12 Teacher Appreciation Week
- May 15 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- May 25 Submit new membership dues at LouisianaPTA.org/membership
- May 25 Submit new officer data at LouisianaPTA.org/submit-officer-data-1

June 2023

- June 1 Search, share, and publicize Summer Learning Programs at PTA.org and your local community
- June 12 “Ask LAPTA” Zoom Meeting at 12:00 pm and 7:00 pm
- June 22–25 National PTA Virtual Convention (tentative dates)
- June 25 Submit new officer data at LouisianaPTA.org/submit-officer-data-1

ABOUT NATIONAL PTA

The Local PTA Unit is a member of the Louisiana PTA (LAPTA) and National PTA organizations, maintains the requirements for active affiliation, and shares the mission, purposes, values, and standards of National PTA. Find more information at LouisianaPTA.org and pta.org.

Why are we here? Mission: To make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Purposes

- To promote the welfare of children in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children;
- To promote the collaboration and engagement of families and educators in the education of children;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children;
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.



Values

- **Collaboration:** We work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We dedicate ourselves to children's educational success, health, and well-being through strong family and community engagement while remaining accountable to the PTA's founding principles.
- **Diversity:** We acknowledge the potential of everyone without regard to age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our PTA's goals.
- **Accountability:** All members, employees, volunteers, and partners share responsibility to align their efforts toward the achievement of our PTA's strategic initiatives.

National PTA Standards for Family-School Partnerships

- Standard 1: **Welcoming All Families Into the School Community** – Families actively participate in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- Standard 2: **Communicating Effectively** – Families and school staff engage in regular, two-way, meaningful communication about student learning.
- Standard 3: **Supporting Student Success** – Families and school staff continuously collaborate to support students' learning and healthy development both at home and at school and have regular opportunities to strengthen their knowledge and skills to do so effectively.
- Standard 4: **Speaking Up for Every Child** – Families are empowered to be advocates for their own and other children, and to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- Standard 5: **Sharing Power** – Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- Standard 6: **Collaborating With Community** – Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

PROCEDURE BINDER

A **Procedure Binder** is one of the most important basic tools in PTA work and is often the least used. LAPTA strongly urges all local units' officers and chairs to maintain an accurate and complete Procedure Binder for all work of the PTA. Since most new recruits have little or no experience on the job, the binder helps to identify the task and chart a course of action. A Procedure Binder tells of the history of the PTA and what the position entails. It is an up-to-date record that gives a foundation on which to build. If an officer or chair has not received a binder from their predecessor, now is the time to start one. Procedure Binder is the property of the PTA and not of the person who is using it.

A loose-leaf binder with dividers is essential. If materials will not fit in the binder, use an expandable folder. Each binder may be used for more than one year and be updated by the current user. Procedure Binders should contain calendars of school district, PTA events, LAPTA deadlines. Include resource materials such as the Bylaws, Standing Rules, approved budget, Board roster, summary of any passwords and accounts, Expense and Deposit Forms, and information from National PTA and LAPTA. Report, agendas, and minutes from all meetings should be included. Everything should have a place in the Procedure Binder.

EMAIL PROTOCOL

It is recommended that local units should create PTA email accounts for the Board which are handed down to successors. The use of personal accounts is discouraged. Passwords and accounts need to be known by the President and at least the Secretary.

When sending emails to a large list of people, use an email service such as MailChimp which is free. This way the recipients do not see everyone else's email address and it is a convenient and organized.

Email as a means of communication is subject to the same professional standards used in writing a letter or speaking as a PTA representative. Be careful what is said. Always include names, proper openings, closings, and "PTA" in the subject heading. Use the tagline *everychild.onevoice*.[®] Email is not to be used for discussing details of sensitive issues that relate to an individual's removal from office, hearings, or investigative meetings. Copy the President and/or Vice-President when appropriate and obtain the approval of the President if the email is considered important or being sent to many members.

Keep messages short when possible. Proofread the email and check for tone. Respond to email as soon as possible but not later than 3-5 days. If sending an attachment with the email, always include a message in the body of the email. Email should be courteous, concise, clear, communicate the message, have a cooperating tone, and spell checked.

CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*everychild.onevoice*). When used properly, PTA's logo and tagline create a consistent message, help to unify all PTAs, and set PTA apart from other organizations. The success of the PTA brand identity depends on all PTAs' adherence to the guidelines. PTA.org provides a uniform, effective system for PTAs to maintain a consistent, visual style and brand identity for all PTA-produced materials. Visit PTA.org/home/run-your-pta/PTA-Branding-and-Web-Guidelines. Download "**Customize Your PTA Logo**" Power Point file to type in the PTA name and save the customized logo.

Just as a Chick-fil-A franchise wouldn't change the logo of the company for its location, Local PTA Units may not change the PTA logo. It is a registered trademark. **The PTA Blue is Pantone 541c, or hex code #1A3E6F, or RGB (26, 62, 111). Only PTA Blue, black, or white may be used. The font is Arial Black.** The Registered Trademark symbol must follow "PTA" and the tagline "*everychild.onevoice*."



CHEDDARUP AND MONEYMINDER

The Louisiana PTA encourages Local PTA Units to utilize online platforms to track finances and collect membership dues. While there are several platforms, LAPTA recommends and uses **CheddarUp.com** to collect membership dues and **MoneyMinder.com** to track finances. CheddarUp also works as a website where documents can be uploaded, forms can be created, and items can be sold. It can work as an online store at little cost. PTAs can choose to have the buyers pay the purchasing fees.

To open a CheddarUp account, use the link below to save 15% and give LAPTA a referral fee.



CheddarUp.com/?ref=LouisianaPTA



CheddarUp has the Basic entry level account that is free. If you plan to sell items such as tshirts that have size, quantity, and color variations, then you will need to upgrade to Pro or Team account.

Basic

Jump right in
\$0 FREE forever

Basic features:

- ✓ Up to 5 items per collection
- ✓ Up to 1 form or waiver
- ✓ Track online and offline payments
- ✓ One-click spreadsheet export
- ✓ Free and unlimited withdrawals
- ✓ Low processing [fees](#)

Pro

Perfect for sellers
\$10/month with annual plan

All Basic features plus:

- ✓ Unlimited items, forms, and waivers per collection
- ✓ Require entry code
- ✓ Offer discounts
- ✓ Set start and end times
- ✓ Include taxes
- ✓ Add shipping at checkout
- ✓ Add multiple item images and variations (e.g., size and color)
- ✓ Visitor Reports
- ✓ Lower processing [fees](#)

Team

Add managers
\$30/month with annual plan

All PRO features plus:

- ✓ Add managers and share data while keeping banking info private
- ✓ A Group Page — one URL with all of your collections
- ✓ Account-wide reporting
- ✓ Automatic (recurring) payments
- ✓ Lowest processing [fees](#)

The CheddarUp account must be in the PTA's name under the EIN. CheddarUp also requires a personal Social Security Number to open an account, which must come from an authorized bank signer. CheddarUp has reports that show detailed information on a real-time basis. The PTA must have immediate access to know who has paid, the purpose of the payments, and the expected cash transfer amount. Budget the fees as an expense line item in the budget. **All deposit transfers** from CheddarUp must occur at least monthly directly into the PTA bank account and with a completed Deposit Form.

MoneyMinder.com is simple accounting software for volunteers and makes tracking expenses and deposits and running reports as simple as possible. It is also easily shareable from one Board to the next, with continual access to past years. Cost is \$179 per year. **MoneyMinder and CheddarUp partnered with each other. If you use one, you get a free upgrade from the other. Check for the latest offers with each business.**

- Visit Cheddarup.com/?ref=LouisianaPTA to see what CheddarUp has to offer.
- Visit Mandeville.CeddarUp.com to see a current PTA CheddarUp site.
- Visit MoneyMinder.com to start an account or get more information.

WHAT IS ACTIVE AFFILIATION?

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 nine items which are detailed later in this section. The files are easily submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTAs that do not maintain Active Affiliation will be subject to the Retention Plan. See the next page for detailed list of items.



WHAT IS THE RETENTION PLAN?

If a Local Unit fails to submit the Active Affiliation Packet by the yearly deadline, then the Retention Plan is initiated by LAPTA. When a Local Unit fails to submit the yearly requirements to maintain its IRS non-profit status and National PTA affiliation, then LAPTA has a “Retention Plan” to get units back on track. 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 PTAs might inherit a PTA not in compliance and are usually not initially familiar with the requirements of Active Affiliation. 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.

There are five phases to the **Retention Plan**.

1. **Notification:** LAPTA notifies the PTA of the missing Active Affiliation Report (due October 28, 2022) and gives the PTA 30 days to submit the report from the date of notification.
2. **Restriction:** After 30 days without proper submission, the PTA moves into the **Restriction Phase**. The Local Unit is given 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, the PTA moves into the **Restructure Phase** where 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 instead move directly into the Intervention Phase. If no Plan of Action is implemented, then the LAPTA may consider moving the Local Unit into the Dissolution Phase earlier. *See Plan of Action Form at the end of this section.*
4. **Intervention:** After a PTA signs a Plan of Action, then the LAPTA will assign a support team and the Plan of Action is implemented according to its details and dates.
5. **Dissolution:** A Local Unit is considered for revocation of their charter and loss of their LAPTA associated IRS 501(c)(3) nonprofit status under these circumstances: Active Affiliation is not acquired for three consecutive years; the Local Unit leadership refuses to implement a Plan of Action when placed in the Restructure Phase; or the Local Unit is not in compliance with the Purposes and Principles of PTA as defined in the Local Units Bylaws Template, adopted May 2022, Articles II and III. The Local PTA must cease and desist further use of the PTA name when the charter is revoked. Bank and online accounts must be closed with any remaining funds donated to a PTA.

WHAT IS THE REACTIVATION PHASE?

If a PTA has not maintained Active Affiliation for at least three years but wants to reaffiliate with Louisiana PTA and the National PTA, then the Local Unit may move into the **Reactivation Phase**. For Local Units that have not filed taxes for at least three years yet want to reactivate their PTA, LAPTA is here for you. First, contact LAPTA at aafiles@LouisianaPTA.org. It is recommended that you apply online for a new EIN with the IRS with a new PTA unit name. Complete the **Reactivating an Existing PTA Packet**.

ACTIVE AFFILIATION REPORT

DEADLINE: OCTOBER 28, 2022

Each membership year, local PTAs must submit the following requirements to obtain **Active Affiliation Status with Louisiana PTA and National PTA**. The files are easily submitted online at <https://form.jotform.com/221816998285068> or scan the QR Code. PTAs that do not maintain Active Affiliation will be subject to the Local PTA Retention Plan.



Local Unit Name	Parish	Local Unit LUR#	Date
President's Email	President's Phone		

Required forms are:

1. **MEMBERSHIP:** Submit member dues to LAPTA for all members with a minimum requirement of 30 members. Go to LouisianaPTA.org/membership and select *Submit Unit Dues*. Print the email confirmation of payment.
2. **LEADER DATA:** Submit to Louisiana PTA the name and contact information of the Board and Committee members and chairs within 15 days of election or appointment at <https://form.jotform.com/221275677028157>.
3. **BYLAWS:** Submit the first page of Bylaws showing the LAPTA approval stamp and approval date. Bylaws must be updated every three years with the LAPTA Bylaws Template. Visit LouisianaPTA.org/bylaws.
4. **TAXES:** Submit proof of 2020 filed and accepted IRS Form 990 tax filing.
5. **BUDGET:** Submit the Local Budget Approval Form and the Approved Annual Budget.
6. **AUDIT REPORT:** Submit the Audit Committee Report for the previous year.
7. **ARTICLES OF INCORPORATION:** Submit the updated Annual Report of the Articles of Incorporation from Louisiana Secretary of State at geauxbiz.com.
8. **INSURANCE:** Submit the insurance declaration page, if applicable. This will be required for 2023-24 year.
9. **TRAINING:** Submit proof of PTA Leadership Training for all officers at either the LAPTA Leadership Training or at PTA.org. (Create a PTA.org account, go to *My Profile*, select *eLearning* or *Thrive*, and download the eLearning certificates.)

If the Active Affiliation Report is not submitted by the yearly deadline, then the Local PTA **Retention Plan** will be initiated. The five phases of the Retention Plan are Notification Phase, Restriction Phase, Restructure Phase, Intervention Phase, and Dissolution Phase. For a PTA not in compliance, complete the *Plan of Action Form* at <https://form.jotform.com/221817137059053>. For Local Units that have not filed taxes for at least three years yet want to reactivate their PTA, complete the **Reactivating an Existing PTA Packet**.

Questions? Email LAPTA at afiles@LouisianaPTA.org.

ACTIVE AFFILIATION: PLAN OF ACTION

For Local Units in the Restructure Phase, contact LAPTA at aafiles@LouisianaPTA.org to discuss your situation. Complete the Plan of Action Form online at <https://form.jotform.com/221817137059053> or scan the QR Code to work toward Active Affiliation status. This form is for your records only.



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:

- MEMBERSHIP: A minimum of 30 LAPTA membership dues was not submitted.
New deadline: _____ Emailed to LAPTA Date: _____
- LEADER DATA: Board data was not submitted to LAPTA at <https://form.jotform.com/221275677028157>.
New deadline: _____ Emailed to LAPTA Date: _____
- BYLAWS: Bylaws are outdated or were not submitted.
New deadline: _____ Emailed to LAPTA Date: _____
- TAXES: IRS taxes were not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- BUDGET: Local Budget Approval Form with the Approved Budget was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- AUDIT REPORT: Audit Committee Report was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- ARTICLES OF INCORPORATION: Active Annual Report from LA Secretary of State was not filed.
New deadline: _____ Emailed to LAPTA Date: _____
- TRAINING: Proof of PTA Leadership Training for all elected officers was not filed.
New deadline: _____ Emailed to LAPTA Date: _____

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

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



Submit the information online at <https://form.jotform.com/221817137059053> or scan the QR Code.