



## 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 is 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 its charter and loss of 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](mailto: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.



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

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### 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](https://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](https://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](https://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](https://PTA.org). (Create a [PTA.org](https://PTA.org) account, go to *My Profile*, select *eLearning* or *Thrive*, and download the eLearning certificates.)

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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](mailto:afiles@LouisianaPTA.org).



# ACTIVE AFFILIATION: PLAN OF ACTION

For Local Units in the Restructure Phase, contact LAPTA at [aafiles@LouisianaPTA.org](mailto: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.



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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:

- 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.*

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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



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