DISSOLUTION OF A LOCAL PTA UNIT

Local PTA Units may dissolve and close their association affiliation with Louisiana PTA and National PTA. The PTA's General Membership and its community shall be given an opportunity to express their opinions and decide by vote to dissolve or not. Parliamentary procedures must be followed to protect the members and comply with federal nonprofit 501(c)(3) regulations. Dissolving PTA Units is LAPTA's responsibility and it must be included in the process.

A PTA Unit is subject to termination and withdrawal of its charter by LAPTA for reasons such as: its General Membership votes to dissolve; noncompliance of affiliation requirements; violation of the Bylaws or, for other causes, actions, or behaviors declared by LAPTA.

FIRST STEP: Contact LAPTA President at president@louisianapta.org to discuss the situation and receive guidance on how to proceed. Complete Request to Dissolve an Existing PTA online at https://form.jotform.com/221998662679074 or scan the QR Code.

SECOND STEP: Move to Dissolution

OPTION 1: If a PTA has active members with voting rights from the current fiscal year, then the PTA shall follow the steps listed in the Bylaws for legally closing a unit in compliance with the IRS.

1. **Board Meeting:** The Local PTA Board of Directors shall adopt by a two-thirds vote to recommend that dissolution of the PTA be submitted to a vote at a General Membership Special Meeting.

2. **Notice to Members:** Written notice for the Special Meeting shall include intent to dissolve the local PTA and shall be given to each voting member with thirty days' notice prior to the Special Meeting.

3. **Notice to LAPTA:** Written minutes of the Board of Director's meeting with recommendation to dissolve and the written notice for the Special Meeting shall be given to the LAPTA President with twenty days' notice prior to the Special Meeting.

OPTION 2: If the Local PTA Unit does not have active members who can vote to dissolve, then LAPTA shall conduct the vote among its Board of Directors with prior notice following the Bylaws guidance.

THIRD STEP: Charter Withdrawal

Upon withdrawal of its charter, the PTA is obligated to promptly carry out all proceedings necessary for dissolving the PTA under the supervision and direction of LAPTA. Further, it shall:

1. Surrender all of its books and records to LAPTA and surrender its assets and property to LAPTA or to another local PTA affiliated with LAPTA in accordance with Federal 501(c)(3) regulations.

2. Give LAPTA access to all PTA technology accounts such as Facebook, bank accounts, and more.

3. Cease and desist from the further use of any name that implies or connotes association with the National PTA or LAPTA or status as a constituent association of the National PTA.
Louisiana PTA (LAPTA) is responsible for overseeing the dissolution of a PTA and shall be included in the process. Complete the form online at https://form.jotform.com/221998662679074 or scan the QR Code. Use this form throughout the process for each step.

**Step 1: Which LAPTA Officer is helping you?**

PTA Name: ___________________________ Assisting LAPTA Officer: ___________________________

School Name: ___________________________ School Parish: ___________________________

Your Name: ___________________________ PTA Board Position, if applicable: ___________________________

Your Phone: ___________________________ Email: ___________________________

School Contact Name and Position: ___________________________ Email: ___________________________

School Contact Phone: ___________________________ Email: ___________________________

When were the federal taxes last filed? ___________________________

What is the tax filing site and login? ___________________________

What is the bank name? ___________________________

What is the bank login? ___________________________

How much money remains in the PTA bank account? ___________________________

Do you have the checkbook? ____________ Who are the authorized bank signers? ____________

What is the contact information for the bank signers? ___________________________

What is the LA Secretary of State GeauxBiz.com login? ___________________________

Is there any other helpful information? ___________________________

After speaking with LAPTA, where will the remaining money go? ___________________________

**Step 2: Move to Dissolve.** Conducted by _____ Local PTA Unit or _____ LAPTA Board of Directors

_______ Date Board of Directors voted to submit dissolution to the General Membership

_______ Date written notice was given to the General Membership of Special Meeting

_______ Date Board of Directors’ minutes and Special Meeting notice given to LAPTA

_______ Date of Special Meeting. Was dissolution affirmed? ___________________________

_______ Date Minutes from Special Meeting were provided to LAPTA

Choose one: _____ Voluntary Dissolution without Prejudice or _____ Charter Withdrawal by LAPTA

**Step 3: Charter Withdrawal**

_______ Does the above PTA agree to cease and desist from further use of any name that implies association with the National PTA or LAPTA in all its forms?

_______ Date former PTA turned over its books and records to LAPTA

_______ Date assets and property were transferred to LAPTA or to ___________________________ PTA

_______ Amount of assets transferred. Attach report of transferred property.