

LAPTA ToolKit

2022 - 2023



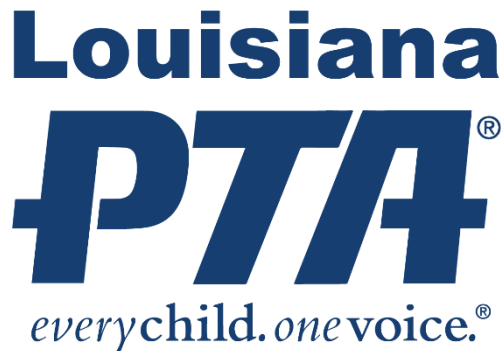
Board of Directors

2022 – 2023

Section 5

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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.

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

BEING A BOARD OF DIRECTORS MEMBER

The PTA Board of Directors (Executive Board) establishes the framework within which everyone works. It is a team of volunteers who are members of the PTA and who are elected to office or appointed to chair a committee. They work together to set goals for the Local PTA Unit and to establish methods to achieve those goals. Effective teamwork requires mutual respect, knowledge of their role and the role of others, compassion, and commitment.

PTA Board members shall believe in and support the mission, purposes, values, and policies of National PTA and LAPTA. They must be a member of their Local PTA Unit within 30 days of the start of the membership year in which they serve. They will receive no compensation from the PTA except reimbursement for reasonable expenses as set forth in PTA policies and procedures. They will sign the Confidentiality, Ethics, and Conflict of Interest Policy on an annual basis. Board of Director members may not serve in more than two capacities and may hold only one elected office on the board.

Board of Directors Composition

Board of Directors shall consist of the elected officers, the chairs of standing and special committees, and the principal of the school or their designated representative. Other members may be designated in the Standing Rules.

Duties of the Board of Directors

Board members shall carry out the fiduciary responsibilities for this PTA by exercising the following:

- **The duty of care** requires each to use prudent care and concern of Board responsibilities, including but not limited to completing all components of required training, delivering all official materials to their successor or the President following the end of their term, and attending all meetings of the PTA.
- **The duty of loyalty** requires placing the interest of the PTA above any other, including but not limited to refraining from making any slanderous or defamatory statements that could harm the PTA name or brand, presenting a united front on decisions made as a Board of Directors, and maintaining confidentiality.
- **The duty of obedience** requires adherence to the law, and the PTA's mission and governing documents, including but not limited to complying with the legal filing requirements of the state and federal government agencies, reviewing the records retention policy annually, signing the Confidentiality, Ethics, and Conflict of Interest Policy, ensuring an annual budget for the upcoming fiscal year is prepared and submitted to the PTA for adoption at the annual meeting, abiding by the policies and procedures set by LAPTA, and performing the duties outlined by the governing documents and those assigned by the President.

All Board members are expected to come prepared for a productive Board meeting. In addition to having their specific position report ready to share, every Board member has additional responsibilities during the meeting. They should be ready to actively participate in the discussions during the meeting and read any reports or information distributed prior to the meeting such as the agenda, meeting minutes, and financial reports. PTAs utilize parliamentary procedure to ensure that everyone may express their opinions in a fair and positive manner. Participating in meetings means being ready to speak and listen.

Board meetings are closed meetings. Discussions and opinions shared in the meeting are confidential. Maintaining confidentiality not only builds trust among Board members but also preserves the Board meetings as a safe place to share all diverse opinions needed to make the best decisions. Only Board members attend Board meetings. Anyone may request the permission of the President to address the Board of Directors but is only allowed to ask a question, give a report, or provide information, and then they must leave the meeting. A non-Board member cannot participate in the discussion or the voting process.

The PTA Bylaws contain special provisions for emergency voting by the Board of Directors. These procedures must be followed for any vote by phone, email, video conferencing, or other means if authorized by the President.

QUORUM

Quorum must always be established to do certain business of the Board of Directors. For Board meetings, **quorum is defined as half of its filled positions plus one**, or a majority. For example, if there are 25 positions on the Board of Directors, but only 12 positions are filled, then the quorum is seven (half of 12 plus 1). If a person fills more than one position, they are only counted once when establishing the majority number. A Board member may temporarily assume the duties of a vacant position until that position is filled.

IMPORTANCE OF BOARDSMANSHIP

Serving on the Board of Directors extends beyond management and completion of position-specific duties. These specific duties are presented in this guide and are in the Bylaws and Standing Rules. Effective Board members know that in addition to satisfying requirements detailed in the PTA's governing documents, particular skills are essential to a well-functioning board such as a unified voice and collaboration.

It is important to have an awareness of how decisions and actions of individual Board members reflect on the perception of the entire Board by their PTA members, future PTA members and leaders, school staff, and the greater community. No matter the differences of opinion shared within the Board meeting, the PTA Board of Directors presents itself with a unified voice. Not doing so will undermine any efforts to gain support for PTA events and programs and to make a real difference in the school community.



Collaboration is also key and will requires that each Board member works in a complementary fashion, supporting all Board members' work in PTA. The structure of the Board and committees, utilizing parliamentary procedure to ensure all voices are heard, and requiring meetings, lends itself to a collaborative spirit in conducting the business of PTA. It is essential to share the responsibility of all PTA actions, messaging, programs, and events to project a positive opinion of PTA. From the outside, there should be no distinction between Board member responsibilities. The reputation earned by the PTA will be reflected on the entire Board, not on specific individuals. Working together to ensure that each Board member successfully executes their responsibility and participates in meetings goes a long way in establishing respect and support for PTA in the school community.

Positive relationship-building creates a unified voice and collaboration, among many other important skills. If there are good, strong, healthy relationships between Board members, the work of PTA will be successful and fun. The essential building blocks of relationship-building are mutual trust, respect, taking responsibility, valuing others, and open communication. In addition to building relationships amongst Board members, remember that the PTA's relationship with the school staff, district, families, and the greater community is essential to the success of the PTA. Effective management of these skills and the specific Board duties as described in this guide will ensure the success of the PTA and make excellent PTA leaders.

CENTENNIAL BUTTON PINS



It is a special birthday for LAPTA! To celebrate our centennial year, every member will receive a free button from LAPTA! The pin-on button is a 1½" circle with the blue and white "Here We Geaux!" slogan. It is important to submit dues monthly for every member so that LAPTA sends the correct number of buttons to the Local PTA Unit to distribute to their members with the membership thank you note. This really is a big deal and something to be very proud of. Please pass that enthusiasm on to the members!

GETTING STARTED

Congratulations! As a new Board member, get an early start to set yourself up for success. Each year, PTA leaders need to do the following shortly after their election or appointment.

- Make sure your PTA membership is current. All Board members must be PTA members during the school year for which they were elected or appointed.
- Register with LAPTA at LouisianaPTA.org/submit-officer-data-1.
- Meet with the outgoing Board members and review their binders and files together.
- Ask for the current copy of the PTA Bylaws and Standing Rules. The Bylaws must be reviewed locally and approved by LAPTA every three years.
- Follow LAPTA on social media. Familiarize yourself with the entire website at LouisianaPTA.org.
- Follow National PTA on social media. Create a profile on the National PTA website at PTA.org. Your account allows you access to the PTA Local Leader Kit and an incredible amount of resources.

Duties at a Glance

- Sign the Confidentiality, Ethics, and Conflict of Interest Policy annually.
- Contact your predecessor to request previous records and other relevant information to know what has been done in the past.
- Form your committees! Find people to help fill Board positions.
- Keep an organized binder to provide the successors with everything done throughout the year.
- Attend required LAPTA training and take advantage of e-learning available at PTA.org.
- Review and become familiar with the PTA Bylaws, Standing Rules, and the Active Affiliation Report.
- Act in emergencies between meetings of the Board.
- Make a report of committee action items at each Board meeting.
- Attend all monthly meetings of the PTA. Board of Directors, General Membership, and Committee meetings are scheduled throughout the year. Check the Bylaws for which months are required to have specific meetings. Your presence is necessary to ensure a quorum is met, and your participation is imperative to the success of the PTA.
- Present a report at Board and General Membership meetings relevant to your position.

Qualities of Effective Officers

- Understand and promote the purposes and policies of the PTA.
- Perform all duties of the office as outlined in the Bylaws and Standing Rules.
- Cooperate with the school administrator, staff, and others responsible for children.
- Study the material distributed by LAPTA and National PTA. A good place to start is PTA.org/local-leader-kit.
- Attend state and national leadership training and meetings.
- Make reports as required and file annual reports as part of the PTA's records.
- Return to Treasurer all funds pertaining to the office.
- Keep a procedure binder to pass on to succeeding officers. Transmit records, reports, and other material to succeeding officers in a timely manner.
- Protect members' privacy by not distributing membership lists to outside interests.
- Answer correspondence promptly.
- Stay informed by reading the publications of the PTA.



EXECUTIVE COMMITTEE

The Executive Committee consists of the elected officers of the PTA. They all assist the President to reach the goals of the PTA. The duties of officers are specified in the Bylaws and Standing Rules.

President directs the affairs of the PTA in cooperation with the other members of the Executive Committee and Board of Directors. See the *LAPTA Toolkit: President* for full details.

Vice-Presidents aid the President. The President may delegate specific programs such as Membership, Legislation, or Reflections Program to a Vice-President. A Vice-President can act in place of the President only when empowered to do so by the President or, if the President is unable to do so, when empowered to act by the Board of Directors.

Treasurer receives and disburses all money as the authorized custodian of PTA funds as prescribed in the Bylaws or authorized by the PTA. See *LAPTA Toolkit: Treasurer* for full details.

Secretary keeps accurate records of the proceedings of the PTA and is the custodian of the PTA records. See *LAPTA Toolkit: Secretary* for full details.

COMMITTEES

Committees are the working machinery of the PTA that plan and promote its activities. Each committee is headed by its appointed or elected “chair” based on their qualifications for the committee’s field of work. It has a definite function and is subject to the control and direction of the PTA. The work and goals of the PTA determine the number and nature of the committees necessary. Refer to the Bylaws and Standing Rules for specific information about committees and the selection of committee chairs.

A terrific way to recruit new volunteers is through committees which are critical to the success of PTA. They provide an opportunity for individuals to do the work best fit for them. Members develop a sense of worth and personal satisfaction as they contribute to the total work of the PTA. Committee chairs are responsible for appointing their committee members with the approval of the Board of Directors.

Committees work effectively on many tasks. The procedures are informal, allowing individuals freedom to discuss and make greater contributions. Create an open, relaxed, and supportive environment. The size of the committee shall be small enough to allow for greater efficiency and flexibility and large enough to complete the task. In some cases, the Standing Rules specify the number of members on a committee.

A committee only has the authority that it is specifically given. Committees do not function as separate groups but are part of the PTA and must operate within the framework of PTA Bylaws, policies, and procedures. All projects and activities must have the approval of the Board of Directors and the PTA in advance.

Standing Committees perform work in specific areas continuously throughout the year. **Special Committees** perform work for a specific short-term purpose and cease to exist upon completion of the work. The following is a short list of committee suggestions, although a PTA may have other committees not listed.

COMMITTEE EXAMPLES

Advocacy Committee provides members with information about current legislative issues to foster effective participation in local, state, and national government; presents the PTA position on proposed laws that affect the education, health, and well-being of children to legislators at all levels; and works with other groups with similar interests. Visit PTA.org/local-leader-kit/mission/advocacy and LouisianaPTA.org/advocate for further details.

Budget Committee develops the PTA budget. The Treasurer acts as the chair. Two or more additional members are elected or appointed according to the Bylaws. The committee studies the previous year's budget and Treasurer's reports to determine how well the budget met the unit's needs. Next, they determine the projected financial requirements, considering the funds needed for programs, projects, and leadership development, and develop the proposed annual budget. PTAs are not fundraising organizations, but rather are educational advocacy organizations. PTA's major emphasis shall be on informing and educating members on issues related to children. The Treasurer must submit the budget to the Board and General Membership for approval. The committee may meet at various times during the year to determine if budget changes are necessary. Changes may only be made by amendment at a General Membership meeting. It is recommended that notice of such pending action be given prior to the meeting date. Learn more at LouisianaPTA.org/treasurer and PTA.org/local-leader-kit/finance.

Bylaws Committee reviews and revises the LAPTA Bylaws Template, noting the last approval date by LAPTA stamped on the cover page. Bylaws must be reviewed, updated, and submitted to LAPTA for approval every three years. LAPTA Bylaws guidance is available at LouisianaPTA.org/bylaws.

Communications Committee keeps the members and school families apprised of the PTA work and how they can play a part. This committee creates public awareness, understanding, recognition, and support of PTA goals and programs. Find tips and best practices to effectively share messages with fellow PTA members, school staff and administrators, community members, and the media at PTA.org/local-leader-kit/communications.

Reflections/Cultural Arts Committee emphasizes the benefits of arts education in the school and community. Members encourage participation in and administer the Local Unit Reflections Program and oversee other arts programs introduced by LAPTA. Find more information at PTA.org/home/programs/reflections/artsedtools and LouisianaPTA.org/arts-education.

Diversity, Equity, and Inclusion (DE&I) Committee works to build an organization that recognizes diversity and values differences and similarities among people through its actions and accountability. These characteristics include age, ethnicity, gender, language, culture, and socioeconomic status, among others. PTAs genuinely represent their communities when they respect differences, acknowledge shared commonalities uniting their communities, and develop meaningful priorities based on that knowledge. PTAs gain strength when they fully represent their communities through increased volunteer and resource support. Visit PTA.org/home/run-your-pta/Diversity-Equity-Inclusion.



Education Committee focuses on the enrichment and policy of education. It provides opportunities for students to enhance their knowledge, develop learning skills, and access other education needs. It advocates in the community on the issues that affect students' education, achievement, and school success. Visit PTA.org/home/family-resources and PTA.org/home/run-your-pta/how-we-pta/access-to-opportunities.

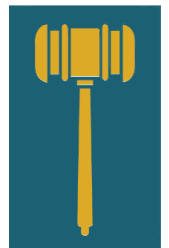
Family Engagement Committee helps strengthen, support, and sustain the involvement of families in the lives of their children. Families are the essential ingredient to ensure a high-quality education for every student. Decades of research shows that family engagement matters for student success. Students whose families are engaged are more likely to attend school, avoid discipline problems, achieve at higher levels, and graduate. Family engagement also helps schools. Research suggests it is equally as important as school leadership and a rigorous curriculum in school improvement. Learn about PTA's guiding principles of the 4 I's (Inclusive, Individualized, Integrated, and Impactful) of transformative family engagements at PTA.org/the-center-for-family-engagement/about#fouris and PTAs Leading the Way on Transformative Family Engagement.

Financial Resources Committee secures financial support for PTA programs through fundraising, sponsorship, donations, and grant submissions. The plan of work is based on the unit's goals with educational, social, or recreational value while reflecting the PTA's high principals. Information on appropriate fundraising is at [PTA.org/local-leader-kit/fundraising/mission-driven-fundraising](https://www.PTA.org/local-leader-kit/fundraising/mission-driven-fundraising).

Healthy Lifestyles Committee educates parents about the physical, mental, and emotional health needs of children. Members of the committee offer educational resources and engagement opportunities that empower students and families to make better informed health decisions. It is the shared responsibility of families, schools, and communities to develop the "whole child." Together, they can ensure that every child is healthy, safe, engaged, supported, and challenged. National PTA publishes information on their Healthy Lifestyles initiative at [PTA.org/home/programs/Healthy-Lifestyles](https://www.PTA.org/home/programs/Healthy-Lifestyles) and [PTA.org/home/run-your-pta/how-we-pta/social-and-emotional-well-being](https://www.PTA.org/home/run-your-pta/how-we-pta/social-and-emotional-well-being). Learn more about PTA responses to food insecurity at [PTA.org/home/run-your-pta/how-we-pta/addressing-food-insecurity](https://www.PTA.org/home/run-your-pta/how-we-pta/addressing-food-insecurity).

Student Involvement & Leadership Committee gives the student population the opportunity to gain experience and knowledge about leadership, advocacy and the legislative process, philanthropy, and PTA values and goals. Learn more about Student Involvement at <https://www.PTA.org/home/run-your-pta/ptsa-resources>.

Hospitality Committee develops a spirit of friendliness among members and others who may attend meetings; assists in discovering special talents and interests among members; assists in organizing special events and fosters a feeling of belonging among members. Members of the committee help to create a board that works as a team; and show children by example how teamwork can make their world a better place. Read more about transformative engagement at [PTA.org/local-leader-kit/leadership/lead-the-pta-way](https://www.PTA.org/local-leader-kit/leadership/lead-the-pta-way).



Male Engagement Committee focuses on the importance of fathers and father figures in the success of our children. Increased involvement of men (including single fathers, non-custodial dads, home-schooling dads, custodial grandparents, and other concerned relatives) in their students' education causes student grades and test scores to improve, attendance to increase, and more student involvement in school activities. Father involvement is associated with children's better socio-emotional and academic functioning. Find a good starting point at [Supporting-multicultural-membership-growth/Male-Engagement](https://www.PTA.org/supporting-multicultural-membership-growth/Male-Engagement) and the "[ABCs of Male Involvement Handout](#)."

Membership Committee builds an informed and active membership of the PTA. A growing and engaged membership is the foundation for achieving PTA's mission to make every child's potential a reality. Committee members are responsible for the year-long membership campaign that includes seeking out and involving people who may not have considered joining the PTA. Visit [PTA.org/local-leader-kit/membership](https://www.PTA.org/local-leader-kit/membership), [PTA.org/home/run-your-pta/membership-resources](https://www.PTA.org/home/run-your-pta/membership-resources), and LouisianaPTA.org/membership-tools for details to help guide this mission.

Nominating Committee has the important job of nominating candidates, which determines the course of the PTA in years to come. The Bylaws indicate when the committee is elected and the number of members who will serve. Any member of the PTA may be elected to the committee except the President. Committee members shall be informed, active, interested, and consider the welfare of the PTA above all else. The committee shall select the best qualified candidate possible for each office to be filled. Serving on this committee does not prevent a member from being chosen as a nominee. Guidance is provided at LouisianaPTA.org/bylaws.

Program Committee plans engaging, educational and fun opportunities that inspire, recognize, and impact all students and their families. National PTA provides in-depth toolkit guidance for local units to host age and grade level programs in-person and virtually. Discover more about them at [PTA.org/home/programs](https://www.PTA.org/home/programs). Find inspiration from programs hosted by PTA units at [PTA.org/home/run-your-pta/how-we-pta#howwepta](https://www.PTA.org/home/run-your-pta/how-we-pta#howwepta).

Room Representatives Committee serve as a liaison for the classroom and provide a personal contact between the PTA, parents, students, and teachers. This promotes the fourth Purpose of PTA which is to bring home and school into closer relation, so that parents and teachers may cooperate intelligently in the education of children and youth. The *Room Representative Coordinator* represents the group on the Board of Directors.



Teacher Appreciation Committee recognizes and celebrates teachers for their contribution to children and honors their dedication and passion for teaching children during Teacher Appreciation Week -- the first full week in May. National PTA provides new Toolkits each year to assist local units in celebrating their teachers – find them at [PTA.org/home/events](https://pta.org/home/events).

Other committees might be Volunteer, Website, Handbook, Library, and more.

ORIENTATION MEETING

The Board of Director's first meeting is an orientation for both new and returning members. It shall include:

- Welcome and introduction of members
- General overview of a good, functioning board, including dates, locations, and number of meetings members are expected to attend and the procedure to follow if they will be absent
- Importance of keeping a procedure binder
- PTA Basics with the structure, policies, and procedures of PTA, the Bylaws, and Standing Rules
- Procedures for reporting (who reports what and to whom)
- Role and responsibilities of board members: work with administrators and others with responsibility for children; attend PTA workshops and e-learning; respond to emails, memos, letters, and phone calls; participate at board meetings, including discussion, listening, voting, and abiding by and supporting decisions
- Policy that all Board Members must submit member dues to be on the board
- Overview of Deposit Form and Expense Form
- Proposed PTA calendar
- Board roster with emails and phone numbers
- Review and signature of Confidentiality, Ethics, and Conflict of Interest Policy

VIRTUAL MEETINGS

The PTA Board of Directors is authorized to meet on a virtual meeting platform, through electronic communications media, or telephone conference call with proper notice of the meeting in accordance with the Bylaws. All attendees must be able to hear and participate in the business being discussed. For General Membership meetings, the first of the year and election meetings must be in person. For Board meetings, the first of the year meeting plus one other meeting must be in person. Virtual meeting guidelines are listed in the Bylaws. No one shall attend in-person meetings virtually. Meetings may be recorded by one Board member, preferably the Secretary, for the purpose of accurately documenting business. There are specific guidelines for recording in your Bylaws.

SETTING GOALS

Goals give direction, establish priorities, and determine how to accomplish and evaluate a task, and they tell the who, what, when, where, and how. Goals should be specific, measurable, attainable, and have an established timeline. There are two types of goals: **Administrative Goals** deal with the running of the organization such as establishing a goal to increase membership by 10%; and **Program Goals** addressing the needs current families and communities have such as organizing a STEM+Families Science Festival.

It is wise to work with the principal and teachers and then survey the community to determine their concerns. If there is no need or no support for a program, it will not succeed no matter how good it may seem. After setting the goals, develop a plan of work and a master calendar of the year's activities.

FINANCE FOR BOARD MEMBERS

All Board members need to be knowledgeable of the following financial responsibilities of the PTA.

The Internal Revenue Service (IRS) requires reporting by nonprofits on a range of governance issues that reach far beyond financial reporting, including Board member “fiduciary duty.” Fiduciary is defined as “a person to whom property or power is entrusted for the benefit of another.” Board members have three fundamental fiduciary duties: a duty of care, a duty of loyalty, and a duty of obedience.

- The duty of care means that the Board member actively attends and participates in Board meetings, is educated on the mission, purposes, and principles of the PTA, provides strategic direction, and oversees and participates in the day-to-day operations of the PTA.
- The duty of loyalty requires the Board member to operate in the interest of the local PTA and not use the position to further personal agenda.
- The duty of obedience requires the Board to know the state and federal laws and regulations that apply to PTA, including IRS regulations and guidance. Obedience requires a deep understanding of the operating documents such as the Bylaws, Standing Rules, and LAPTA Toolkit. Finally, obedience requires that the Board not act outside the scope of the PTA’s legal documents.

Fiduciary responsibility in a PTA means the Board members act as trustees of the PTA’s assets and must exercise due diligence to oversee that the organization is well-managed and that its financial situation remains sound. The Board verifies that all filing requirements and tax obligations are completed.

The budget creates the framework for program management and overall administrative decisions. An approved budget is always required for expenditures to be made and fundraisers to be conducted. The budget for the new year is presented and adopted by the membership at the first General Membership meeting of the year. The members always approve expenses and income via the budget, which can be amended as needed.

Payments and reimbursements are never made in cash and blank checks are never issued. All payments must relate to an approved budget item and have an Expense Form with a receipt attached. No other organization may pass its money through the PTA account, and money cannot be given to the school to spend at its discretion.

All deposits or monies collected are turned over to the Treasurer as soon as possible. Money is counted by at least two people at the same time, and both counters and the Treasurer each sign and keep a copy of the completed Deposit Form. The Treasurer may be one of the two counters.

Current financial reports with the actual vs. budget amounts are presented at Board of Director and General Membership meetings that covers the financials since the last meeting of that type. As the funds belong to the members, they have the right to access the financial reports presented at General Membership meetings.

Each bank statement is reviewed and signed by a person not authorized to sign on the bank account. The Secretary presents the result of this review at the Board meeting.



A financial audit occurs at the end of the fiscal year; when any authorized check signer is added or deleted on any bank account; or any time deemed necessary by the President or at least three members. The President motions to appoint the Financial Reconciliation Committee consisting of at least three members, who are not authorized signers, the current secretary, incoming Treasurer, nor be related by blood or marriage or reside in the same household as the authorized signers.

Insurance is strongly recommended by LAPTA for each local unit. Embezzlement (bond) policy covers people authorized to handle money and liability insurance covers losses through any fraudulent or dishonest acts. Insurance premiums are budgeted as an expense line. For these policies to apply, bank statements must be regularly reviewed by a non-signer and audit reports occur at least annually.

HOW BOARDS SUCCEED

Boards succeed when members have a good understanding of the organization and their role. The nominating committee should provide an accurate interpretation of responsibilities to potential nominees. The President should provide an orientation for all officers at the beginning of each term of office.

Boards succeed when they have a well-planned orientation for new and old members. Experienced board members need an annual update on the organization's work and accomplishments. New board members need to be introduced to the procedures of the board. All board members need to reflect on future plans in a positive atmosphere.



Boards succeed when they are neither too small nor too large. It is hard to conceive of a board getting the job done if it is simply too small and equally difficult to picture a successful board weighed down with too many members.

Boards succeed when they have established standing committees. Standing committees shall have an approved plan of work and shall operate throughout the school year.

Boards succeed when they have a long-range plan. A year-long plan provides an overall view of where the PTA is going. It ensures the continuity of programs and projects undertaken by the PTA.

Boards succeed because they have a process for self-evaluation. At least once a year the board shall review and evaluate the goals, accomplishments and problems of each committee and officer. This annual process should be tied to the long-range planning process. The review should form the basis for the annual report.

Boards succeed when they have provisions for eliminating nonproductive members. The Nominating Committee shall evaluate the participation and interest of board members and make appropriate recommendations for election. Between elections, organizations shall have a process in place to deal with nonproductive members.

Boards succeed when they have a planned rotation. Rotation prevents the ingrown possessiveness that sometimes occurs on self-perpetuating boards. New members bring innovative ideas and promote growth of the organization.

Boards are successful because of an effective Nominating Committee. The decisions made by the Nominating Committee determine who will lead the next group. This committee should be well organized, have a time schedule, and a planned working procedure.

LAPTA LEADERSHIP TRAINING

All elected officers for Local PTA Units shall complete annual PTA Leadership Training. Proof of training is required for the Active Affiliation Packet. Other Board members are encouraged to receive training, as well. Board members should understand the other positions and roles within the Board. Sources for training are:

- 1) **LAPTA Leadership Training Days:** In-person training is offered in southern Louisiana on August 20, 2022, and in northern Louisiana on August 27, 2022; Local units will receive registration information from LAPTA. Please make sure the new officers' information is submitted to LAPTA as soon as they are elected.
- 2) **E-Learning from PTA.org:** Create an account. Under the *Run Your PTA* menu, select E-Learning. Submit a copy of the emailed completion certificate.
- 3) **LAPTA Training Videos:** Watch the training videos found at LouisianaPTA.org/videos. Upon completion, complete the online *Training Video Survey*. Submit a copy of the email you will receive of your survey answers.

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.

PTA FAQs

Why should I join PTA?

PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. Being a member of PTA means that you are part of a powerful association and action plan that is focused on programs and initiatives that strengthen your child's education. PTA membership and dues support your child by funding essential educational and curriculum needs; advocating on behalf of children and educators at all levels; and building an inclusive school community. Join PTA for your child because increasing our membership, even by one, makes it possible to provide important educational resources and to create a stronger school community.

Where does my money go when I pay membership dues?

You become a member of the local PTA, Louisiana PTA, and National PTA. The dues directly support your child. PTA dues help fund essential school resources and curriculum needs. PTA dues support advocacy efforts at the local, state, and national levels, impacting decisions affecting your child's health, safety, and quality of education. PTA dues support our work to strengthen connections between your family, your child's classmates and their families, and teachers to build a thriving and inclusive community for everyone.

Does PTA membership require volunteering and attending meetings?

The only thing required of you to be a member of PTA is to submit the annual membership dues. Beyond that, however you choose to PTA is up to you. PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. From volunteering at school events to participating in local, state, and national advocacy efforts to holding PTA leadership roles – the level of involvement is up to you. There is no wrong way to PTA!

How much time do I have to commit to being a member of PTA?

Membership in PTA can involve as much or as little time as you have to offer. There is no wrong or right way to PTA. Anything you can give, whether it's time or money, supports your child's potential.

Isn't PTA a social club for stay-at-home moms?

PTA is for every family with a child in school. PTA is for moms, dads, caregivers, grandparents, teachers, and the community. While some PTA work appears purely social including family events that are organized to strengthen school community, much of PTA's work focuses on funding essential school resources and curriculum needs, as well as advocating at all levels, which impacts your child's health, safety, and quality of education.

How does PTA ensure it represents every child and family at the school?

We encourage every family in the school to become a PTA member to support the success of their child. We want a diverse membership base that reflects all of the families and needs of students at the school. PTA strengthens connections between your family, your child's classmates and their families and teachers to build a thriving and inclusive community for everyone.

How does PTA impact my child?

PTA provides schools access to experts, resources, trainings, and dozens of nationally recognized educational enrichment programs that impact a child's education such as the Family Reading Experience, in partnership with the Reading is Fundamental. PTA funds the nation's largest and longest running student arts program, Reflections®, which provides students access to arts, music, literature, dance, drama, and visual arts. PTA's national advocacy efforts have helped establish universal kindergarten and the National School Lunch Program, the juvenile justice system and anti-child labor laws.

How do you advocate at the national, state, and local levels and why is it important to my child?

PTA is active at the local, state, and national levels, impacting decisions affecting your child's health, safety, and quality of education. During the past 120 years, PTA's national advocacy efforts helped establish universal kindergarten, the National School Lunch Program, the Juvenile Justice System, and anti-child labor laws.



DOS AND DON'TS OF PARTNERING WITH ADMINISTRATORS

Do:

- **Plan together.** Learn administration goals and discuss how your PTA can engage families in supporting those goals.
- **Connect to resources.** Talk with the principal about how state and National PTA programs and resources support and enhance student learning.
- **Be respectful.** You don't always have to agree. Find a way to communicate in a professional and respectful manner with your school's leadership.
- **Differentiate.** Help school administration understand that your local unit is a separate and independent child advocacy group, part of and supported by a large and experienced association.
- **Meet regularly.** Consider a regular monthly coffee or lunch with the principal or arrange a regular phone call. Invite the superintendent to board meetings. Stay in touch.
- **Make the connection visible.** Ask your principal to provide a report at PTA meetings, or to write an article for your PTA's newsletter or post for the PTA blog. Plan an open-to-all "chat with the principal" or "coffee with the superintendent."
- **Engage families.** Share the National PTA Standards for Family-School Partnerships materials. Collaborate on building better family engagement and improving student success. Consider registering in the National PTA Schools of Excellence program.
- **Engage community.** Invite community groups or youth-serving organizations to the school for PTA events. With the principal, identify community service opportunities for families.
- **Encourage participation in the budget process.** Give parents the info they need to effectively advocate during budget time. Help parents support the education budget.
- **Stay on the same page.** Follow up all phone calls and meetings with a summary of what was discussed and confirmation of any action steps to be taken by the PTA or administration.
- **Ask to speak at teacher meetings.** Ask to be treated as a partner in education, a vital part of the connection between home and school.

Don't:

- **Be adversarial.** Developing a working relationship is well worth the effort. Find common ground. Model civil discourse, even if it is difficult to deal with administration.
- **Comingle funds.** Mixing private and public funds is forbidden. No PTA funds should ever be deposited in a school account and no school funds should find their way into a PTA account.
- **Give up control of the checkbook.** PTA is a separate entity from the school. PTA funds are controlled by PTA members and board. The checkbook resides with the treasurer.
- **Cede control of PTA meetings.** All members—even administrators—have the same rights at meetings. The PTA President or the president's delegate runs the PTA meeting, in compliance with PTA bylaws and using Robert's Rules.
- **Get in trouble with the IRS.** Know the rules and file the proper forms with the IRS. PTA's funds are not school funds; do not use the school's EIN. Consult your state PTA if you have questions.
- **Open your PTA to theft.** No administrator wants to deal with the negative publicity surrounding a PTA's poor money management. Use good business judgment, ensure financial reports and audits happen, and follow your state PTA's rules about money-handling.
- **Entangle administration in personality issues.** Sometimes personal issues interfere with PTA function. To maintain a professional, credible relationship with administration, work through your personal problems without involving administration. Seek help, if necessary, from your state PTA.
- **Become an ATM.** PTA funds are raised to further PTA's mission and goals, not to supplement school budgets. Collaborate with administration, but do not allow your PTA to be viewed as a bottomless source of funding available for all administration requests. Raise awareness rather than raise funds.

DOS AND DON'TS OF PARTNERING WITH TEACHERS

Do:

- **Plan together.** Working to achieve common goals is a powerful tool to build relationships. What are teachers trying to achieve? How can PTA help get parents and community involved?
- **Invite teachers to join and become involved.** Ask teachers to attend meetings and provide input. Identify ways for teachers to become involved even if they cannot attend a meeting. Create a campaign specifically messaging PTA's value to teachers and ask teachers to support your PTA's work by joining PTA.
- **Identify volunteer opportunities.** Work with teachers to identify classroom and activity-related volunteer opportunities, and then find volunteers to assist.
- **Show respect.** Let teachers know that your PTA values them. A good working relationship between home and school is essential to student success.
- **Seek input.** Suggestion boxes, surveys, one-on-one meetings, program assessments, etc.—ask for teachers' input on PTA's impact and on the success of PTA programs and encourage teachers to offer suggestions for improvement.
- **Build a team.** Informal social gatherings, game/fun nights, family sporting events and outings—how can your PTA build relationships outside the classroom among PTA board members, parents, and staff?
- **Show appreciation.** Thank teachers for their support of PTA and the work they do for children. Plan meaningful Teacher Appreciation Week activities, and regular recognition of teacher's efforts.
- **Demonstrate cooperation.** A strong PTA-teacher relationship is a partnership. How can PTA help teachers? What can staff and PTA leaders accomplish together? Approach all interaction with teachers in a spirit of cooperation.

Don't:

- **Criticize teachers for missing PTA meetings.** While teachers' meeting attendance is a good goal for a PTA, it is important to remember that many teachers have their own family activities and PTA events to attend. Also, some teachers have had bad experiences with certain parents. PTA support does not have to include meeting attendance.
- **Bribe or blackmail.** Teacher recognition or support of grade or classroom activities should not be tied to teacher membership.
- **Become an ATM.** Demonstrate that advocacy is better than fundraising to secure needed resources. Talk to teachers about their needs and brainstorm ways to make those needs known in the community.
- **Show up unexpectedly.** School is a teacher's workplace. Schedule a meeting or provide notice. Be respectful of teacher's time. Do not interrupt class time.
- **Assume knowledge.** Schools are vibrant workplaces and teachers must keep track of more than just PTA activities. Keep teachers informed about PTA events and schedules. Ensure teachers know about upcoming fundraising or classroom activities. And brief teachers on PTA priorities and successes. Help teachers understand the value PTA brings to their place of work.



CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

Members of the Board of Directors of the PTA/PTSA serve in a fiduciary capacity and owe a duty of care, a duty of obedience, and a duty of loyalty to the PTA. Board members shall conduct themselves with integrity and honesty and act in the best interests of the PTA. Disclosure by a board member of any potential or actual conflict of interest is required by the standard of good faith and for the benefit of the PTA and protection of each individual.

In consideration of the PTA's affiliation with the Louisiana Congress of Parents and Teachers (LAPTA), for the protection of its integrity and its 501(c)(3) status, and for our protection, we, the undersigned officers, individually, during our terms of office, shall:

1. Abide by and represent our PTA Bylaws, LAPTA policies, positions, procedures, and National PTA purposes and mission statement;
2. Discharge the duties and responsibilities of our individual offices with fidelity, integrity, and honesty and declare all personal and extended family conflicts of interest when PTA issues, decisions, and funds are involved;
3. Not misuse the PTA's federal tax-exempt status for personal or unauthorized purposes nor disburse funds for any purpose other than authorized, budgeted PTA programs, projects, and activities.
4. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA name or brand.
5. Publicly present a united front on decisions made as a Board.
6. Maintain confidentiality as a member of the Board.
7. Follow the LAPTA and school district guidelines for fundraising.
8. Abide by the following conflict of interest policy:
 - a. Board members and their families shall not use their relation to this PTA for financial, professional, business, employment, personal, or political gain.
 - b. A conflict of interest exists when a Board member would have to participate in the deliberation or decision of any issue of this PTA while, at the same time, the board member and their extended family has financial, professional, business, employment, personal or political interests outside the PTA that could predispose or bias the board member to a particular view, goal or decision.
 - c. Board members shall declare to the officers of this PTA conflicts of interest (stating the nature of the conflict and pertinent information as appropriate) between their duties of this PTA and their or their extended families' financial, professional, business, employment, personal or political interests.
 - d. When a conflict of interest is declared, the Board members shall not use their personal influence of position to affect the outcome of a vote and shall leave the room during deliberations and the vote.
 - e. The minutes of the meeting shall reflect that a conflict of interest was declared.
 - f. Board members shall not:
 - i. Use PTA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.
 - ii. Directly or indirectly use their current PTA position, the PTA name or organization for or against any specific candidate for elected public office, which is contrary to federal tax laws and the guidelines and policies of the PTA.



BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA units are required to review and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template is required. Visit LouisianaPTA.org/bylaws for details. Bylaws not in compliance will be returned to local unit. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments made in PDF format to **Bylaws@LouisianaPTA.org**. Please allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will emailed the approved Bylaws or amendments to the President’s email.

_____	_____	_____
Local Unit Name	Local Unit Parish	Local Unit LUR#
_____	_____	
President’s Email	President’s Phone	

The Bylaws or Amendments were approved at the General Membership meeting held on _____.
DATE

Choose one.

The Local Unit PTA is: Existing PTA Reinstated PTA New PTA

Choose all that apply.

- The Bylaws approved by the General Membership are attached.
- List approved amendments below including the article heading, section number, and line number(s).

If more space is needed for amendments, check here for the attached addendum.

_____	_____
President’s Signature	Secretary’s Signature
_____	_____
President’s Name	Secretary’s Name

Email the completed Bylaws Approval Form and Bylaws template (if applicable) to **Bylaws@LouisianaPTA.org** in PDF format. Allow ample time for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the final approved document to the President’s email.

Contact Bylaws@LouisianaPTA.org with any questions.

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.

