

# ACTIVE AFFILIATION REPORT \*\*\*VERY IMPORTANT\*\*\*

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 PTA Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes nine items and are submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTA Units who do not maintain Active Affiliation will be subject to the Retention Plan. Deadline to submit the files is **October 27, 2023**.

## DUE OCTOBER 27, 2023

Local PTA Units must annually obtain **Active Affiliation Status with Louisiana PTA and National PTA**. The required information is submitted online at <https://form.jotform.com/221816998285068> or scan the QR Code. For further information, see [LouisianaPTA.org/activeaffiliation](https://LouisianaPTA.org/activeaffiliation). The following items are individually uploaded into the corresponding field (do not combine files):



1. **MEMBERSHIP:** Submit member dues to LAPTA for all members at [LouisianaPTA.org/membership](https://LouisianaPTA.org/membership).
2. **LEADER REGISTRATION:** Register all Board members at [LouisianaPTA.org/register](https://LouisianaPTA.org/register).
3. **BYLAWS:** Submit the first page of Bylaws showing the LAPTA approval stamp. Visit [LouisianaPTA.org/bylaws](https://LouisianaPTA.org/bylaws).
4. **TAXES:** Submit proof of 2021 filed and accepted IRS Form 990 tax filing.
5. **BUDGET:** Submit the 1) Local Budget Approval Form **and** 2) the approved Annual Budget.
6. **AUDIT REPORT:** Submit the Audit Committee Report for the previous year.
7. **ARTICLES OF INCORPORATION:** Submit the updated Articles of Incorporation from [geauxbiz.com](https://geauxbiz.com).
8. **INSURANCE:** Submit the insurance declaration page. This is now required.
9. **TRAINING:** Submit proof of training for officers from LAPTA Development Day or at [LouisianaPTA.org/training](https://LouisianaPTA.org/training).

## RETENTION PLAN

If a Local PTA Unit fails to submit the Active Affiliation Packet by the yearly deadline, then LAPTA uses the Retention Plan to get units back on track. Communication with LAPTA is key and encourages the PTA to get back to Active Affiliation status. Email [afiles@LouisianaPTA.org](mailto:afiles@LouisianaPTA.org) with questions. There are five phases to the **Retention Plan**.

1. **Notification:** LAPTA notifies the PTA and gives 30 days to submit the missing items.
2. **Restriction:** The Local Unit is given a second 30-day period to submit the missing items and are additionally not eligible for awards, programs, or grants administered by LAPTA or National PTA.
3. **Intervention:** The PTA signs a Plan of Action which designates new deadlines for the missing items.
4. **Restructure:** If the PTA does not complete the report, LAPTA may choose to restructure the leadership of the PTA or choose to move into the Dissolution Phase early.
5. **Dissolution:** A Local Unit is considered for revocation of their charter and loss of their LAPTA associated IRS 501(c)(3) nonprofit status if: Active Affiliation is not acquired for three consecutive years; PTA leadership refuses to implement the Plan of Action; or the PTA is not in compliance with the Purposes and Principles of PTA as defined in the Bylaws, adopted May 2022, Articles II and III. The PTA must cease and desist further use of the PTA name. Bank accounts must be closed with any remaining funds donated to a PTA.