

Local PTA Unit Bylaws by Louisiana PTA for

Local Unit Registration # (LUR): _____ Employer Identification # (EIN): _____

School Name: _____

School Address: _____ Parish: _____

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LAPTA Approval Stamp
and Activation Date:

Article I: Name

The name of the nonprofit association is _____ located in _____, Louisiana. Throughout the Bylaws, it is referred to as “association,” “Local PTA Unit,” “Unit,” or “PTA.” The PTA operates under the authority of the Louisiana Congress of Parents and Teachers, commonly known as “Louisiana PTA” or “LAPTA,” which is a branch of the National Congress of Parents and Teachers, commonly known as “National PTA.” Units with student memberships may use the title “Parent Teacher Student Association” or “PTSA.”

Article II: Purposes

Section 1. Objectives. The purposes of PTA, Louisiana PTA, and National PTA are to:

1. Promote the welfare of children and youth in home, school, places of worship, and throughout the community.
2. Raise the standards of home life.
3. Advocate for laws that further the education, physical and mental health, welfare, and safety of children and youth.
4. Promote the collaboration and engagement of families and educators in the education of children and youth.
5. Engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children and youth.
6. Advocate for fiscal responsibility regarding the federal, state, and local dollars provided through taxes and grants for public education funding.

Section 2. Advocacy and Awareness. The purposes of the PTA shall be advanced through advocacy and education in collaboration with parents, teachers, educators, students, and the community. These objectives are pursued through conferences, committees, projects, and programs guided by the basic principles set forth in Article III.

Section 3. Federal Tax-Exempt Status. The association is organized exclusively for charitable, scientific, literary, or educational purposes within the meaning of Section 501(c)(3) of the Internal Revenue Service.

Article III: Principles

The following principles are fundamental and align with those of National PTA and LAPTA.

1. The association shall be noncommercial, nonsectarian, and nonpartisan.
2. The association shall empower children, families, and educators within schools and communities to provide quality education for all children and youth. It shall seek to influence school policies and advocate for children's issues, while recognizing that the responsibility for decision-making was delegated by the people to educational boards and authorities.
3. The association shall work to promote the health and welfare of children and youth and promote collaboration among families, schools, and the broader community.
4. The association shall uphold inclusivity, equity, knowledge of PTA principles, and professional expertise as guiding principles for its service.

Article IV: Affiliation with National PTA and LAPTA

Section 1. Affiliation. The PTA is organized and chartered under the authority of LAPTA and adheres to the rules and regulations prescribed by LAPTA in its Bylaws. LAPTA issues a charter to each PTA to confirm its association. Active Affiliation implies that the PTA annually upholds and submits the following to LAPTA:

1. Abides by PTA's purposes and fundamental principles.
2. Maintains approved Local PTA Bylaws on file with LAPTA, subject to renewal every three years and approval by LAPTA. The Bylaws must prohibit proxy voting, may not be altered beyond the allocated fields, and have amendments approved by LAPTA.
3. Acquires a unique IRS Employer Identification Number (EIN).
4. Registers officers annually with LAPTA.
5. Obtains general liability insurance and bonding.
6. Presents the PTA budget to its General Membership who must approve the budget with a motion.
7. Completes the Audit Report for the previous fiscal year.
8. Files Form 990 with the IRS which is due annually by November 15.
9. Maintains "good standing" with the Louisiana Secretary of State by updating the annual report.
10. Submits membership dues for the actual number of members (minimum of 30/year) to LAPTA.
11. Obtains training for the officers as specified by LAPTA.

Section 2. New Units. LAPTA is responsible for chartering new local chapters, called "Local PTA Units." Each Local PTA Unit is an independent nonprofit entity, established in compliance with state and federal laws.

Section 3. Protected PTA Units. When a PTA cannot comply with its Bylaws or fill officer positions outlined in Article VI, Section 1, it may request Protected Unit Status from LAPTA. If granted, LAPTA may appoint its officers; the minimum number of required memberships is 10; and the PTA may not participate in LAPTA or National PTA contests, awards, or grants. The Protected Status expires automatically after two years.

Section 4. Eligibility. PTAs must have Active Affiliation to participate in National PTA and LAPTA programs, to receive National PTA and LAPTA awards and grants, and to vote at the LAPTA General Membership Meeting.

Section 5. Accounting and Record Books. Every PTA must maintain permanent financial records that detail the gross income, receipts, and expenditures, including total membership count, dues received from members, and the dues transferred to LAPTA. LAPTA and National PTA reserve the right to inspect the records with reasonable notice. Records may be stored electronically with multiple backups.

Section 6. Charter Withdrawal. When a PTA's charter is withdrawn and its PTA status terminated, it must:

1. Promptly conduct all required actions to facilitate the PTA's charter withdrawal under LAPTA's

- supervision and guidance.
2. Transfer all books, records, assets, and property either to LAPTA or to an agency designated by LAPTA in compliance with 501(c)(3) nonprofit regulations.
 3. Discontinue any further use of a name suggesting or implying affiliation with PTA, National PTA, or LAPTA.

Section 7. Dissolution Process for a Local PTA Unit.

1. After consulting with LAPTA, the Local PTA's Board of Directors (BOD) proposes a motion to dissolve at a BOD Meeting which needs a two-thirds affirmative vote and emails the minutes to LAPTA.
2. Written notice to dissolve the PTA is provided to all members and to LAPTA for a Special General Membership Meeting with 20-day notice.
3. At the Special General Membership Meeting, a vote on the dissolution occurs. Only active members who paid PTA dues before the adoption of the dissolution proposal may vote.
4. The meeting's minutes are emailed to LAPTA. Upon the successful completion of the dissolution process, the PTA's charter and nonprofit status shall be formally revoked.

Section 8: Virtual and Electronic Meetings and Communications. Virtual or electronic platforms are permitted to conduct all types of meetings. All participants must have the ability to hear and actively participate in discussions. All communications required by the Bylaws, including meeting notifications, may be transmitted electronically.

Article V. Membership and Dues

Section 1. Eligibility. Membership in PTA is open without discrimination to anyone who believes in and supports the mission, purposes, and principles of National PTA.

Section 2. Rights and Privileges. The membership year is July 1 to June 30. All members of a PTA organized under the authority of LAPTA are members of National PTA and LAPTA. They are entitled to all benefits of membership, which includes the ability to serve in governance positions for and the right to vote at Local PTA, LAPTA, and National PTA meetings based on the requirements of serving as a voting delegate for each body. The PTA may admit individuals to membership at any time and shall keep a membership enrollment. A member is considered "in good standing" upon payment of the annual dues. Each member may attend, participate in, and vote at General Membership Meetings, serve on committees, and receive the PTA's newsletters and other communications, when available.

Section 3. Dues. Membership dues are paid annually and expire on June 30.

1. All Board of Directors members must be a member of their Local PTA Unit.
2. The annual membership dues determined by the PTA include the LAPTA dues as set by LAPTA and national dues set by National PTA. See LouisianaPTA.org/membership.
3. Each PTA member pays annual dues to the PTA. The types and costs of memberships are: _____.

Section 4. Termination of Membership. LAPTA Board of Directors has sole discretion to terminate individual memberships for conduct that in its judgment damages the value and goodwill associated with PTA or violates the purposes, policies, or Bylaws of PTA. If LAPTA retains counsel to defend any legal action by a former member to challenge termination and LAPTA prevails in such action, the former member shall pay LAPTA's court costs and reasonable attorney fees incurred. Venue for any suit to challenge LAPTA's action must be brought in the state district court for the parish where LAPTA's state office resides.

1. The Local PTA consults with LAPTA and provides further documentation for termination.
2. The individual and the Local PTA President shall be notified in writing with 20-day notice of the meeting.
3. Both parties shall have the opportunity to attend the meeting and address LAPTA.
4. Termination requires an affirmative two-thirds vote by LAPTA BOD.

Article VI: Officers and Their Election

Section 1. Executive Committee Composition. The elected officers constitute the Executive Committee which consists of one President, one Co-President (optional), _____ Vice-President(s), one Treasurer, and _____ Secretary(ies). In the event of a Co-President, only one President selected by the BOD serves as the primary contact for LAPTA. Other officers may be elected as designated in the Standing Rules.

Section 2. Election Month. Elections occur at a General Membership Meeting held in _____.

Section 3. Term of Office. Officers assume their official duties on July 1 and shall serve for a term of _____ year(s) or until their successors are elected, with only one additional term allowed. A person serving for more than one half of a full term shall be deemed to have served a full term.

Section 4. School Employees. Employees of the school that the Local PTA Unit is supporting may not serve as President, Co-President, or Treasurer of the PTA.

Section 5. Uncontested and Contested Election Voting. For an uncontested position with a single nominee, a verbal vote is sufficient. For contested positions with multiple nominees, a ballot vote is required. A majority vote determines the winner. Only current members are eligible to vote.

Section 6: Obligation to Register with LAPTA. The PTA is required to annually provide LAPTA with contact information for officers within 14 days of elections at LouisianaPTA.org/register. Any change in officers during the year must be immediately reported to LAPTA.

Section 7. End of Term. All officers upon the expiration of term, removal, or resignation shall turn over to an Executive Committee Member all records, books, access to social media accounts, and other materials pertaining to the office within seven days or before the new officers assume their duties, and submit all reimbursement requests, financial paperwork, and funds to the Treasurer.

Section 8. Vacancies. Vacancies in elected offices shall be filled by a majority vote of the BOD. The meeting call provided by the President, 1st Vice-President or Secretary must include the vacancy filling and election and provide 10-day notice. A majority of votes constitutes an election. A vacancy in an office with check signatory privileges requires a financial audit to be performed immediately.

Section 9: Resignation or Removal of Officers. Resignation of an officer requires written notice to an Executive Committee Member. Removal of an officer may occur due to conduct that damaged the value and goodwill of PTA or violated the PTA's purposes, policies, or Bylaws by an affirmative two-thirds vote by the BOD at a BOD Meeting and documented in the minutes. LAPTA shall be notified within seven days.

Section 10: Courtesy Seats for Incoming Officers. Any newly elected officer shall be granted a courtesy seat at all pre-term BOD Meetings.

Article VII: Executive Committee

Section 1. Composition. The Executive Committee consists of the elected officers.

Section 2. Quorum. A majority of the Executive Committee members shall constitute a quorum for the transaction of business at Executive Committee Meetings.

Section 3: Meetings.

1. Regular Meetings are scheduled by the Executive Committee providing 7-day notice.
2. Special Meetings may be called with 2-day notice by the President or upon written request submitted by a majority of the committee members to the President.

Section 4: Responsibilities of the Executive Committee.

1. Attends Annual LAPTA General Membership Meeting when it is held in its region.
2. Executes duties assigned by the BOD.
3. Addresses emergencies between meetings.
4. Approves budgeted expenses.
5. Provides a report at all meetings.
6. Takes actions congruent with existing BOD decisions.
7. Performs other duties prescribed in the Bylaws or as directed by the BOD or Executive Committee.

Section 5. Responsibilities of the President:

1. Presides over all meetings.
2. Creates Standing Committees and Special Committees and appoints committee chairs, subject to the approval of the BOD, as necessary to do PTA work.
3. Coordinates the work of PTA officers and committees.
4. Acts as the official spokesperson for the PTA or appoints a designee.
5. Signs authorized contracts, documents, and checks.
6. Serves as an ex-officio member of all committees except the Nominating Committee.

Section 6. Responsibilities of the Vice-President.

1. Acts as aide to the President.
2. Assumes the duties of the President in their absence or at the President's request.
3. Performs other responsibilities determined by the President and BOD.

Section 7. Responsibilities of the Treasurer.

1. Ensures the PTA's financial records accurately track all incoming and outgoing funds.
2. Holds the PTA checkbook and maintains all financial documents.
3. Chairs the Budget Committee.
4. Executes disbursements as established in the annual budget approved by PTA General Membership and as authorized by the President, BOD, or the PTA.
5. Provides the President and BOD with bank and other financial statements monthly.
6. Arranges for a non-authorized individual to review and sign the monthly bank statement.
7. Assures that all financial transactions have dual authorized signatories.
8. Presents financial statements or monthly budget reports at all meetings and upon request of the BOD.
9. Delivers the Annual Financial Report to the General Membership.
10. Submits the books for audit or review by the Audit Committee.
11. Presents the Audit Report to the BOD.
12. Files the annual 990 federal tax return with the IRS after the fiscal year end before November 15.
13. Records all paid membership dues and maintains the membership roster.

Section 8. Responsibilities of the Secretary.

1. Writes and keeps the minutes for all meetings.
2. Distributes meeting minutes to its members for all PTA meetings.
3. Provides previous meeting records for review at any meeting.
4. Oversees the organization and storage of all PTA records.
5. Keeps the current PTA Bylaws and Standing Rules.
6. Maintains the membership roster.

Article VIII: Board of Directors (BOD)

Section 1. Composition and Eligibility. The Board of Directors (BOD) consists of the elected officers, committee chairs, and the principal or their designee. Other members may be designated in the Standing Rules. BOD members must be a paid PTA member, may not serve in more than two capacities per PTA, may hold only one elected office, and may not serve on the BOD if employed by or under contract to the PTA.

Section 2. Responsibilities of the BOD. The BOD manages the PTA's affairs which includes conducting any business referred by the General Membership, creating Standing and Special Committees with the Executive Committee, creating plans of work, giving reports at meetings, and adopting Standing Rules.

Section 3. Quorum. A majority (50% plus 1) of the BOD constitutes a quorum for the transaction of business. Only filled positions are counted toward the total and each person may only be counted once.

Section 4. BOD Meetings. here shall be at least five meetings per year. Monthly meetings are encouraged.

1. Regular BOD Meetings are scheduled by the President with 7-day notice.
2. Special BOD Meetings may be called with 3-day notice by the President or upon written request by a majority of the BOD members submitted to the President.

Section 5. Standing Rules. The BOD shall annually develop and approve Standing Rules to detail the PTA's work, such as the specific committees and their responsibilities. It facilitates the orderly transfer of duties from one BOD to the next. Standing Rules must conform to and may not conflict with the Bylaws.

Section 6: Resignation or Removal of BOD Members. Resignation of a BOD Member requires written notice to an Executive Committee Member. Removal of a BOD Member may occur due to conduct that damaged the value and goodwill of PTA or violated the PTA's purposes, policies, or Bylaws by an affirmative two-thirds vote at a BOD Meeting and documented in the minutes.

Section 7: End of Term. Upon the conclusion of a term, all duties and responsibilities terminate. Within seven days, BOD Members must hand over all records, books, access to social media accounts, and other PTA materials to an Executive Committee Member, and all reimbursement requests, receipts, financial documentation, and funds must be submitted to the Treasurer.

Article IX: Committees

Section 1. Eligibility and Authority. Any PTA member in good standing may serve on a committee. Committee chairs are appointed by the President or BOD unless otherwise specified in the Bylaws. All committee work must have the consent of the Executive Committee.

Section 2. Committee Types.

1. **Standing Committees.** The President establishes Standing Committees and appoints the chairs, subject to the BOD approval, to conduct the PTA's work and objectives over a full year. The term for Standing Committee Chairs is _____ year(s) or until a successor is selected.
2. **Special Committees.** Special Committees are created and appointed as specified in the Bylaws for a short-term need. The term for Special Committee ends when its special purpose concludes. The President or committee appoints its chair. Additional Special Committees may be created as needed.

Section 3. Required Special Committees.

1. **The Nominating Committee** of three or five members shall be appointed by a majority vote at a General Membership Meeting with 20-day notice and at least one month before elections. The committee or the President shall appoint its chair. The committee nominates eligible individuals to serve for each available office and completes the Nominating Committee Report. Further nominations may be made "from the floor" by submitting written notice of their intent to run to the President. Nominations from the floor close 15 days before elections. The final and complete list of nominees is published four days before elections. The committee presents its slate of nominees at a General Membership Meeting scheduled in the month(s) designated in Article VI, Section 2.
2. **The Budget Committee** of three is appointed by an affirmative two-thirds vote of the BOD and chaired by the Treasurer. It develops the annual budget, solicits revisions from the BOD, and presents the proposed budget at the first General Membership Meeting. The budget is adopted with an affirmative majority vote. Amendments to the approved budget require an affirmative two-thirds vote.

3. **The Audit Committee** of three members is appointed by an affirmative majority vote of the General Membership or two-thirds vote of the BOD to examine the books at the end of the fiscal year or after the resignation of a check signatory. The report is presented to the General Membership.
4. **The Bylaws Committee** of three members is appointed by a majority vote of the General Membership or by a two-thirds vote of the BOD. The committee prepares a revised set of Bylaws every three years by using the Local PTA Unit Bylaws Template by LAPTA. The proposed Bylaws are presented at a General Membership Meeting with 20-day notice and are approved with an affirmative majority vote. Amendments need an affirmative two-thirds vote of the General Membership and approval from LAPTA. The Bylaws are submitted to LAPTA who issues the final approval and activation date.

Article X: General Membership

Section 1. Composition. The General Membership consists of annually paid members in good standing.

Section 2. Quorum. A quorum of _____ members is required to conduct business at meetings.

Section 3. General Membership Meetings. A minimum of two meetings per year is required to approve the annual budget, appoint the Nominating Committee, hold elections, share PTA business, and more.

1. Regular meetings are held on dates chosen by the BOD with 15-day notice in the months of _____
(Include the election month(s) designated in Article VI, Section 2.)
2. Special meetings may be called by the President or by a majority of the BOD or General Membership providing 5-day notice to the General Membership.

Article XI: Annual LAPTA General Membership Meeting (REQUIRED)

The President or their alternate must attend the Annual LAPTA General Membership Meeting when it is held in the PTA's region. Each PTA in Active Affiliation with LAPTA 45 days before the meeting may designate as voting delegates 1) the President or an alternate, and 2) one voting delegate for every 25 members.

Article XII: Fiscal Year

The fiscal year for the PTA is July 1 to June 30.

Article XIII: Parliamentary Authority

The rules contained in the current edition of Robert's Rules of Order, Newly Revised (robertsrules.org) govern the PTA in all cases in which they are applicable and in which they are not in conflict with the Local PTA Unit Bylaws, National PTA Bylaws, LAPTA Bylaws, or the Louisiana Articles of Incorporation.

Article XIV: Amendments

Section 1. Instructions. The Bylaws may be amended with an affirmative two-thirds vote at a General Membership Meeting with proper notice that contains the proposed amendment. Amendments must adhere to LAPTA's Bylaws and guidance. The amendment goes into effect with LAPTA's approval.

Section 2. Bylaws Template Revisions. The adoption of a revised Local Unit Bylaws Template by LAPTA will automatically amend the Local PTA Unit's Bylaws without further action by the Local PTA Unit. The expiration date remains the same.

Instructions for Bylaws Template

The Local PTA Unit Bylaws by Louisiana PTA is a fill-in-the-blank form. Changes can only be made to sections of the Bylaws that have fillable fields. Amendments to the Bylaws require LAPTA approval.

Page 1

Fill in the complete PTA Unit's name without abbreviations other than PTA or PTSA, the Local Unit Registration (LUR) number issued by National PTA, the Federal Employer Identification Number (EIN), the complete name of the school that the PTA supports, the complete school's address, and the Louisiana Parish of the school.

Line 3 and 4: Enter the complete PTA name without abbreviations other than PTA or PTSA.

Line 4: Enter the city where the school is located.

Page 3

Line 122: Enter the dues amount and type for each membership paid to the PTA. For example, \$10/adult, \$7/student, \$7/staff, \$15/couple for 2 memberships, and \$50/business for 5 memberships. *Remember that \$4.50 per member is paid to LAPTA for National PTA and LAPTA dues portions.*

Page 4

Line 139: Enter the number of Vice-President(s) and the number of Secretary(ies) in Line 140.

Line 143: Enter the month(s) when elections are held at a General Membership meeting such as "April/May".

This will need to be included again on Line 313.

Line 145: Enter the number of years for the elected officers' terms **which may only be one or two**. Note that an elected officer may serve a maximum of two consecutive terms.

Line 187: Enter the number of days' notice required before holding an Executive Committee Special meeting.
Suggested **2 – 7** days.

Page 6

Line 251: Enter the number of days' notice required before holding a Board of Directors Special meeting.
Suggested **2 – 7** days.

Line 277: Enter the number of years for Standing Committee Chairs **which may only be 1 or 2** years.

Page 8

Line 309: Quorum is the minimum attendance needed to conduct business at a meeting. Enter the quorum number for General Membership Meetings. Suggested number is 5 if membership is less than 50, 7 if membership is between 50 – 75, 9 if membership is between 75 – 100, 11 if membership is 100 – 125, etc.

Line 313: Enter at least **2 months** for General Membership meetings such as "August/September, December, and April/May" and include month(s) entered on Line 143. Three or four meetings is suggested.

Bylaws and Amendments Approval Form

Local PTA Units are required to review and submit their Bylaws to LAPTA every three years. Bylaws or Amendments not in compliance will be returned to the PTA. See LouisianaPTA.org/bylaws. Follow this timeline for all updates:

- 1) Pick the date for the General Membership meeting that will vote on the Bylaws, noting that two meetings are needed to complete the process. A Special Meeting may be called for either one.
- 2) At the first meeting which needs proper notice, appoint the Bylaws Committee of at least three people by making a motion. To approve the motion, a two-thirds vote is required at a Board of Directors Meeting or a majority vote at a General Membership Meeting.
- 3) The Bylaws Committee meets to complete the proposed LAPTA Bylaws Template.
- 4) At least 20 days before the second General Membership Meeting, publicly give notice of the meeting and post the Bylaws for review by the membership.
- 5) At the General Membership meeting with a quorum established, present the Bylaws and allow for discussion. Edits may be made during this process by making a motion with an affirmative majority vote. Make a final motion to accept the complete Bylaws with an affirmative majority vote to accept. Later amendments to the Bylaws require an affirmative two-thirds vote. (*Amendments* are additional terms or phrases added to the Bylaws Template or are a change to a customizable field for an already approved Bylaws that are not out of date or almost out of date. Ask LAPTA to pre-approve an amendment to avoid delays or problems.)
- 6) Complete the Bylaws Approval Form. Email the Bylaws Approval Form and the Bylaws Template to LAPTA at Bylaws@LouisianaPTA.org. LAPTA will review the Bylaws, give them the final stamp of approval and date of acceptance, and then email the stamped and dated copy back to the PTA.

Local PTA Unit Name

Parish

PTA 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 ☐ Reactivated PTA ☐ New PTA

Choose all that apply.

☐ The Bylaws approved by the General Membership are attached.

☐ Approved amendments are listed below with the article heading, section number, and line number(s).

☐ If more space is needed for amendments, check here and attach an addendum.

President's Signature

Secretary's Signature

President's Name

Secretary's Name