

2024–25 PTA Leader



Section 5: Board of Directors



Index

Importance of Boardmanship.....	87	Procedure Binder.....	93
Being a Board of Directors’ Member	88	Leadership Development & Training	93
Leadership Traits	89	Finance for Board Members	93
Getting Started	89	Brief Checklist for BOD	94
How Boards Succeed	90	LAPTA Calendar	95
Executive Committee	90	Communications and Social Media	97
BOD Committees	91	Partnering with Administrators and Teachers	98
Email Protocol.....	92	Confidentiality, Ethics, & Conflict of Interest Policy	99
Virtual Meetings	92	Active Affiliation Report and Retention Plan	101

Volunteer for Adventure

The 2024-25 theme for Louisiana PTA is “Join the PTA Adventure” which points to the fun side of PTA, the direction of your PTA’s work, and emphasizes joining as a member. How can you keep PTA fun for yourself and others? What direction is your PTA headed? Have you planned for the PTA’s future? What does your PTA adventure look like? The philanthropic work of PTA is a huge personal opportunity to give to others and to positively impact the lives of children to help them reach their potential!

The Louisiana PTA Board is planning its future, and we see YOU in it. There are Board positions that don’t take much time or that can use your gifts and talents to the fullest. If you’d like to increase your impact on children through PTA work at the state level, please contact LAPTA. We all do it because it’s enjoyable, and you are part of our future plan! Email President@LouisianaPTA.org to talk about how you might fit in.

Importance of Boardmanship

Serving on the Board of Directors (BOD) goes beyond mere administrative tasks and adhering to position-specific responsibilities. Exceptional Board Members understand that, alongside fulfilling the stipulated requirements within the PTA's governing documents, certain skills are vital for a smoothly operating Board. Maintain a unified voice and foster collaboration. Be mindful of how the decisions and actions of individual Board Members reflect upon the perception of the entire Board within the PTA membership, prospective PTA members, leadership, school staff, and the community. Present a unified front regardless of differing opinions within Board Meetings. Disunity undermines support for PTA initiatives and programs and hinders contributions to the school.

Collaboration necessitates that each Board Member works in harmony, supporting one another's efforts. The structure of the Board and its committees, along with parliamentary procedures, fosters a collaborative atmosphere. Collectively shoulder the responsibility for PTA actions, communications, programs, and events to project a favorable image of the PTA. From an external perspective, there should be no discernible distinctions between the responsibilities of Board Members. The PTA's reputation is reflected upon the entire Board, not on specific individuals. Board Members who carry out their duties and engage in meetings contribute to establishing respect and support for the PTA in the school community.

Strong, healthy relationships among Board Members are the base for successful and enjoyable PTA work. These relationships are founded on mutual trust, respect, a sense of accountability, valuing one another, and open communication. The PTA's relationships with school staff, the district, families, and the community lead to the PTA's prosperity. Effective management of these skills, alongside the specific Board responsibilities, guarantees the success of the PTA and produces outstanding PTA leaders.

Being a Board of Directors' Member

The PTA Board of Directors is the operational framework for the PTA. This group of volunteers are active members of the PTA who are the appointed or elected committee chairs. Their collaborative efforts center on defining objectives for the Local PTA Unit and devising strategies to achieve these aims. Successful teamwork hinges on fostering mutual respect, empathy, dedication, and understanding of individual roles and responsibilities.

PTA Board Members are required to embrace and uphold the mission, objectives, values, and policies of National PTA and LAPTA. Within 30 days of the commencement of their service term, they must become paid members of their Local PTA Unit. Their involvement is purely voluntary, with no financial compensation, except for reasonable expense reimbursements in accordance with PTA policies and budget. Furthermore, these members are obliged to annually affirm their commitment to the Confidentiality, Ethics, and Conflict of Interest Policy. Each BOD member is limited to holding a maximum of two roles. Elected officers may only hold one elected position. The Board of Directors consists of the elected officers (Executive Committee), the chairs of standing and special committees, and the principal of the school or their representative. Other members may be designated in the Standing Rules.

Duties of the Board of Directors

The Internal Revenue Service (IRS) requires nonprofits to uphold a “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:

1. 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.
2. The **duty of loyalty** requires the Board Member to operate in the interest of the PTA and not to use the position to further a personal agenda.
3. 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, and requires that the Board not act outside the scope of the PTA’s legal documents.

All members of the Board are expected to arrive well-prepared for a productive Board Meeting. Have position reports ready to share, engage in discussions, listen attentively, and carefully review any materials distributed before the meeting, including the agenda, minutes, and financial reports. Adhere to parliamentary procedures so that every member has a fair and constructive platform to voice their opinions.

Board Meetings are exclusive, closed sessions. Any discussions or viewpoints exchanged during these meetings are to be held in strict confidence. Upholding this confidentiality not only fosters trust among Board Members but also maintains the sanctity of these meetings as a secure space for sharing diverse perspectives. Only members of the Board are permitted to attend. However, if anyone seeks to address the Board of Directors, they can request permission from the President for a “courtesy seat.” They may observe the proceedings, pose questions, present reports, or provide information. Once their engagement is complete, they should exit the meeting. Non-board members do not have the privilege of participating in discussions or voting.

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.

A **quorum** is a prerequisite for conducting business at PTA meetings. For Board Meetings, a quorum is defined as half of the total filled positions plus one, or a majority. For example, if there are 15 positions on the Board of Directors, but only 12 of them are currently occupied, then the quorum requirement is seven (half of 12 plus 1). When determining the majority number, an individual holding multiple positions is counted only once.

Leadership Traits

Effective leaders exhibit a remarkable blend of skills and qualities that enable them to excel in various roles while recognizing the untapped potential within their teams. They lead by example and champion a clear and compelling purpose that inspires others to follow suit. These leaders uphold the highest standards of integrity and tirelessly strive for self-improvement. The quest for excellence goes beyond their own achievement. Leaders actively **seek successors and new additions** to their Board of Directors, proactively inviting individuals to join their cause. Competent and effective leaders possess a spectrum of invaluable attributes, including:

1. **Self-Awareness:** The ability to acknowledge one's strengths and weaknesses.
2. **Vision:** Demonstrate a deep understanding of future goals and the roadmap to achieve them.
3. **Relationship Building:** Cultivate trust, mutual respect, and an appreciation for diversity.
4. **Critical Thinking:** Gather relevant information, identify problems, and implement effective solutions.
5. **Time & Resource Management:** Skillfully prioritize tasks and resources to achieve objectives efficiently.
6. **Motivating:** Inspires and fosters enthusiasm and interest among team members.
7. **Empathetic:** Sensitive to the emotional cues, needs, and concerns of others, both spoken and unspoken.
8. **Creativity:** Innovatively generate ideas, alternatives, and novel approaches to problem-solving.
9. **Communication:** Actively listen and convey information concisely and accurately.
10. **Collaboration:** Work harmoniously as a team and prioritize the collective over the individual.
11. **Delegation:** Share responsibilities, provide guidance and follow-up, and nurture leadership in others.
12. **Continuous Learner:** A commitment to personal growth and acquisition of new skills and knowledge.
13. **Integrity:** Uphold ethical standards and do what is right, even when unobserved.

Getting Started

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

- All Board Members must be a paid PTA member during the school year for which they serve.
- Register with LAPTA at LouisianaPTA.org/register. This is not required for Board Members.
- Ask for the current copy of the Bylaws and optional Standing Rules. The Bylaws must be reviewed, updated, and submitted to LAPTA for approval every three years. The Standing Rules are done by the current Board.
- Follow LAPTA and National PTA on social media.
- Familiarize yourself with the entire website at LouisianaPTA.org.
- Create a profile on the National PTA website at PTA.org to gain access to the PTA Local Leader Kit and an incredible amount of resources.
- Sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy annually.
- Contact the predecessor to request previous records and other relevant information to know what has been done in the past.
- Find people to help fill Board positions and to join the committees.
- Keep an organized binder to provide the successors with everything done throughout the year.
- Attend LAPTA training which is required for officers and encouraged for Board Members.
- Review the requirements for the LAPTA Active Affiliation Report at LouisianaPTA.org/affiliation.
- Act in emergencies between meetings of the Board.
- Attend and participate in all meetings of the PTA including Board of Directors, General Membership, and Committee meetings. Check the Bylaws for which months are required to have specific meetings. Attendance is necessary to ensure a quorum is met.
- Present a report at Board and General Membership Meetings when relevant.
- Set specific goals to give direction, establish priorities, determine how to accomplish it. Set Administrative Goals and Program Goals. 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.

How Boards Succeed

Boards succeed when officers have a good understanding of the PTA and their role. The Nominating Committee provides an accurate interpretation of responsibilities to the nominees. The President provides an orientation for all officers at the beginning of each term of office.

Boards succeed when they have a well-planned orientation meeting for new and old members. Previous Board Members provide an annual review of their PTA work. New members are introduced to the procedures of the Board. All Board Members contribute to the PTA's future plans in a positive and group atmosphere.

Boards succeed when they are just the right size. It is hard to get the job done if it is too small and equally difficult to succeed if there are too many members.

Boards succeed when they have effective and established Standing Committees. Standing Committees have an approved plan of work as they 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 reviews and evaluates the goals, accomplishments, and problems of its members. This should be tied to the long-range planning process and be the basis for the annual report.

Boards succeed when they have provisions for eliminating nonproductive members. The Nominating Committee evaluates the participation and interest of Board Members and makes appropriate recommendations for election. Between elections, organizations need to have a process in place to deal with nonproductive members. See the Bylaws for details on how to remove Board Members.

Boards succeed when they have new members. The addition of new members prevents the ingrown possessiveness and staleness that can occur on self-perpetuating Boards. New members bring innovative ideas and promote growth of the PTA.

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 seek and interview all potential nominees.

Executive Committee

The Executive Committee is the elected officers. Their primary role is to support the President and each other in achieving the PTA's objectives. The specific responsibilities are outlined in the Bylaws. The **President** oversees the PTA's operations and works in collaboration with the other members of the Executive Committee, Board of Directors, and General Membership. The **Vice-Presidents** assist the President and may be tasked with managing specific programs. They can act as substitutes for the President when authorized by the President or Board of Directors when the President is unable to preside. The **Treasurer** serves as the custodian of PTA funds, receiving and disbursing money as specified in the Bylaws or as authorized by the PTA. The **Secretary** maintains accurate records of PTA proceedings and serves as the guardian of PTA records. Effective Committee Officers:

- Understand and promote the purposes and policies of the PTA.
- Perform all duties of the office as outlined in the Bylaws.
- Cooperate with the school administrator, staff, and others responsible for children.
- Study the material distributed by LAPTA and National PTA.
- Create effective and necessary committees to perform PTA work.
- Attend state and national leadership training and meetings.

- Make reports as required and file annual reports as part of the PTA's records.
- Return all funds to the Treasurer pertaining to the office.
- Keep a procedure binder to pass on to succeeding officers. Transfer to succeeding officers quickly.
- Protect members' privacy by not distributing membership lists to outside interests.
- Answer correspondence promptly.
- Stay informed by reading the publications of the PTA.

BOD Committees

Committees serve as the operational engine of the PTA, orchestrating and advancing its initiatives. Each committee is led by an appointed or elected "chair." These committees have well-defined roles and operate under the supervision and guidance of the Executive Committee. The PTA's objectives and priorities dictate the quantity and character of the required committees. To find specific details regarding committees and the selection of committee chairs, consult the Bylaws.

Committees possess authority only as explicitly granted to them. They are not independent entities but integral components of the PTA, functioning within the parameters established by the PTA's Bylaws, policies, and procedures. All undertakings and endeavors must receive prior approval from the Executive Committee. Committees work effectively on many tasks. Create an open, relaxed, and supportive environment within the committee. The size of the committee needs to be small enough to allow for efficiency and flexibility and large enough to complete the task.

A terrific way to recruit new Board Members is through people who join a committee. 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.

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 others.

- **The Advocacy Committee** advocates for students and provides information on current legislative matters, promoting active engagement in local, state, and national government affairs. See LouisianaPTA.org/advocate.
- **The Budget Committee** creates the PTA's budget chaired by the Treasurer. Additional members are appointed. It reviews the previous year's budget and reports. The Treasurer presents the proposed budget to the BOD for suggestions and edits, and then the General Membership for approval. See the Bylaws for details.
- **The Bylaws Committee** is responsible for examining and updating the Bylaws, using the LAPTA Bylaws Template. It is mandatory to review, revise, and submit the Bylaws to LAPTA for approval every three years. The expiration date is on the first page of the current Bylaws. See LouisianaPTA.org/Bylaws.
- **The Communications Committee** keeps PTA members and school families informed about PTA initiatives and ways they can get involved. It raises public awareness, fosters understanding, and garners recognition and support for PTA's goals and programs. See PTA.org/local-leader-kit/communications.
- **Reflections/Cultural Arts Committee** emphasizes the benefits of arts education and administers the Reflections Program and oversee other arts programs introduced by LAPTA. See LouisianaPTA.org/reflections.
- **Diversity, Inclusion, and Outreach (DIO) Committee** recognizes diversity and values differences and similarities among people through its actions and accountability. PTAs authentically represent their communities when they respect differences, acknowledge shared commonalities, and develop meaningful priorities based on that knowledge. Visit PTA.org/home/run-your-pta/Diversity-Equity-Inclusion.
- **Education Committee** focuses on the enrichment of education policy and provides opportunities for students to enhance their knowledge, develop learning skills, and access other educational needs. See PTA.org.
- **Family Engagement Committee** helps strengthen, support, and sustain the involvement of families in the lives of children. Families are the key ingredient to high-quality education for every student. Students whose families are engaged are more likely to attend school, avoid discipline problems, achieve more, and graduate.

- **Fundraising Committee** secures financial support for the PTA through fundraising, sponsorships, donations, and grant submissions. See [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. It is the shared responsibility of families, schools, and communities to develop the “whole child.” Visit [Healthy Lifestyles, Social and Emotional Well-Being, and Food Insecurity](#).
- **Student Involvement & Leadership Committee** gives the students the opportunity to gain experience and knowledge about leadership, advocacy, philanthropy, and PTA values. See [PTSA Resources](#).
- **Hospitality Committee** develops a spirit of friendliness among members, organizes special events, and fosters a feeling of belonging among members. See [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 father figures in the success of children which causes student grades and test scores to improve, attendance to increase, and more student involvement in school activities. See [Male Engagement and the ABCs of Male Involvement](#).
- **Membership Committee** builds an active membership and conducts the year-long membership campaign which is the foundation for achieving the PTA’s mission. See [LouisianaPTA.org/membership](https://louisianapta.org/membership).
- **Mental Health Committee** supports mental health for the students. Jessica Latin is the Louisiana Healthy Minds State Champion who can assist PTAs with mental health efforts. Learn more at [PTA.org/HealthyMinds](https://www.pta.org/HealthyMinds), search “Louisiana PTA Healthy Minds” on Facebook, or email Jessica at HealthyMinds@LouisianaPTA.org.
- **Program Committee** plans engaging, educational, and fun opportunities for students and their families. National PTA provides free, in-depth programs for PTAs to implement. See [PTA.org/home/programs](https://www.pta.org/home/programs).
- **Room Representatives Committee** serves as a liaison for the classroom and provides a personal contact between the PTA, parents, students, and teachers. This promotes the fourth Purpose of PTA which is to have parents and teachers cooperate in the education of children and youth.
- **Teacher Appreciation Committee** recognizes and celebrates teachers for their contribution to children and honors their dedication and passion for teaching during Teacher Appreciation Week. This is the first full week in May. National PTA provides resources at [PTA.org/home/events](https://www.pta.org/home/events).

Email Protocol

Create PTA emails 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.

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 “*every child. one voice*®.” Email is not to be used for discussing details of sensitive issues that relate to an individual’s removal from office or investigative meetings. Copy the President and 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 and for wording that can be interpreted in a divisive way. Respond to email as soon as possible but not later than three days. Email should be courteous, concise, clear, kind, and spelled checked. When sending emails to a large list of people, use the BCC feature or an email service such as MailChimp which is free. This way the recipients do not see everyone else’s email address and it is convenient and organized.

Virtual Meetings

The Board of Directors may convene using a virtual meeting platform, electronic communication means, or telephone conference calls, provided that proper notice of the meeting is given. All participants are required to have the capability to listen to and actively participate in the meeting. For General Membership Meetings, the initial meeting of the year and election meetings are mandated to be conducted in person. As for Board Meetings, the first meeting of the year, along with at least one other meeting, must also be conducted in person. It is permissible to record meetings to accurately document the proceedings.

Procedure Binder

A Procedure Binder holds a central role within PTA operations, yet it often remains underutilized. LAPTA strongly encourages all officers and chairs to maintain a meticulously detailed Procedure Binder. The binder serves as a valuable tool to identify tasks, outline a clear course of action, and offer quick insights into the history and responsibilities of each position. It belongs to the PTA and not to the individual utilizing it. Each binder can serve for multiple years and should be regularly updated. This can be in digital format with multiple backups and shared with the Executive Committee.

Leadership Development & Training

All elected officers are required to annually complete 4 credits of PTA training. BOD members are encouraged to receive training as they should understand the other BOD positions and roles. The Affiliation Report requires Proof of Training for the officers. See LouisianaPTA.org/training. Sources for training are:

- 4) **LAPTA Leadership Development Days:** In-person training in southern and northern Louisiana in August.
- 5) **LAPTA Virtual Training Meetings:** Held in September with the recordings posted at LouisianaPTA.org/training. Watching the recordings or reading the attached course documents is sufficient.
- 6) **LAPTA Individualized Training:** LAPTA offers one-on-one training as needed. Email President@LouisianaPTA.org.

Finance for Board Members

The budget creates the framework for program management and overall administrative decisions. The annual budget is presented and adopted by the membership at the first General Membership Meeting of the year. The budget can be later amended with an affirmative two-thirds vote of the General Membership.

Payments and reimbursements are never made in cash and blank checks are never issued. The Treasurer provides the Expense Form to be used. All payments must relate to an approved budget item and have an Expense Form with a receipt. No other organization can pass its money through the PTA account. Money cannot just be given to the school or any entity to spend at its discretion.

All deposits 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 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 that cover the financials since the last meeting of that type are presented at all meetings. 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 on the bank account. The Treasurer presents the bank statements for review at Board Meetings.

A financial audit (or review) 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.

Insurance is required for all PTAs. 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.

Brief Checklist for BOD

1. PTA BASICS (LouisianaPTA.org and PTA.org)

- Read the Bylaws which are updated every 3 years. The Bylaws' expiration date is _____.
- Create a personal account at PTA.org.
- Review LouisianaPTA.org and registered at LouisianaPTA.org/register.
- Submit a Plan of Work at the beginning of the year to the Executive Committee.
- Attend LAPTA Leadership Training. See LouisianaPTA.org/training.

2. PRESIDENT (LouisianaPTA.org/president)

- Creates a calendar of events in collaboration with the school's administration.
- Uses Robert's Rules of Order, Newly Revised to govern all meetings. General Membership Meetings are held in the months of _____ and BOD meetings are held in _____ as per the Bylaws.
- Has agendas for all meetings. The secretary recorded the minutes and presented them at the next meeting.
- Knows the quorum for General Membership Meetings which is _____ and for BOD Meetings is _____.
- Files the Active Affiliation Report due date to LAPTA is _____. See LouisianaPTA.org/affiliation.

3. TREASURER (LouisianaPTA.org/treasurer)

- Adopts a budget by vote of the General Membership on _____ date.
- Dates for amendments to the budget are _____.
- Insurance renewal paid on _____.
- Presents Budget Reports and monthly reconciliation reports at all meetings.
- Plans fundraisers to support programs, activities, and PTA goals.
- All expenses are signed by two authorized PTA signatories who did not make the purchase.
- Reviews and signs monthly bank statements by a non-signatory.
- Presents the Audit Report at General Membership Meeting. It is due to LAPTA with the affiliation report.
- Files federal taxes before _____ which is 4.5 months after the close of the fiscal year.

4. SECRETARY (LouisianaPTA.org/secretary)

- Maintains all agendas, minutes, and reports in a binder or digital files.
- Takes concise, factual, and objective minutes. Prepares the draft minutes within 5 days of the meeting.
- Notifies members of upcoming meetings.

5. MEMBERSHIP (LouisianaPTA.org/membership)

- Sets membership goal which is _____. Membership dues per the Bylaws are _____.
- Maintains a Membership Roster spreadsheet with at least the last name, first name, and email.
- Submits dues monthly, as needed, for each new member to LAPTA at LouisianaPTA.org/membership.

6. ADVOCACY, PROGRAMS, SCHOOL, & COMMUNITY (LouisianaPTA.org/advocate, LouisianaPTA.org/programs)

- Includes advocacy efforts in the annual plans which is a core purpose of PTA.
- Includes the mission of PTA when picking programs and events.
- Follows the 3-to-1 rule of three planned programs for every one fundraising activity.
- Participates in the Reflections Arts Program and celebrates the program winners with awards.
- Supports student success by promoting the National PTA Standards for Family School Partnerships.
- Seeks to partner with the teachers, principal, school board, and community.

7. NOMINATING COMMITTEE AND ELECTIONS (LouisianaPTA.org/elections)

- Created per the Bylaws and appointed in the month of _____.
- Elections occur in the month(s) of _____. Twenty days' notice was given for elections.
- Accept additional nominations "from the floor" as per the Bylaws which need to be received 15 days before elections.

2024–25 LAPTA Calendar (Subject to Change)

Visit LouisianaPTA.org/calendar for the latest version of the calendar.

July 2024

July 1 Elected position terms begin
July 15 Annually submit officer and Board contact information at LouisianaPTA.org/register

August 2024

August 1 Submit complete officer and Board contact information at LouisianaPTA.org/register
August 15 Reflections Program opens. See LouisianaPTA.org/reflections.
August 12 Start working on Active Affiliation Report. See LouisianaPTA.org/affiliation.
August 17 LAPTA Leadership Training in Mandeville
August 24 LAPTA Leadership Training in Shreveport
August 27 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm
August 31 Submit new membership dues at LouisianaPTA.org/membership.

September 2024

September Multiple Zoom training classes will be offered. See the schedule at LouisianaPTA.org/training.
September 1 Review PTA.org and LouisianaPTA.org/grants for available grants and their deadlines
September 30 Submit new membership dues at LouisianaPTA.org/membership.

October 2024

October 6–13 National Fire Prevention Week
October 15 Deadline for National PTA School of Excellence submissions
October 18 Fire Safety Poster Contest deadline to submit entries to LAPTA. See LouisianaPTA.org/contest.
October 23–31 National Red Ribbon Week
October 25 LAPTA Fire Safety Poster Contest winners announced
October 31 Submit new membership dues at LouisianaPTA.org/membership.
October 31 Deadline for Active Affiliation Report. See LouisianaPTA.org/affiliation.

November 2024

November 1 Visit PTA.org/home/programs/family-reading and plan a Family Reading Experience event.
November 5 Election Day – Advocate for all children by voting
November 11 Veterans Day
November 18 Reflections Theme Contest Submission deadline. See LouisianaPTA.org/reflections.
November 22 LAPTA Literacy Grant deadline. See LouisianaPTA.org/grants.
November 28 Thanksgiving Day
November 30 Submit new membership dues at LouisianaPTA.org/membership.

December 2024

December 2 LAPTA Literacy Grant winners and LAPTA Reflections Theme Search winners announced.
December 7 Election Day – Advocate for all children by voting
December 31 Submit new membership dues at LouisianaPTA.org/membership.

January 2025

January 19 Reflections Submission Deadline to LAPTA
January 31 Submit new membership dues at LouisianaPTA.org/membership.

February 2025

February 9 Louisiana PTA's 102nd Birthday (1923)
February 17 National PTA Founders' Day
February 28 Submit new membership dues at LouisianaPTA.org/membership.

March 2025

March TBA National PTA Legislative Convention (LegCon)
March 2 Read Across America Day (NEA.org)
March 3 LAPTA Reflections Program winners announced.
March 4 Mardi Gras
March 29 Election Day (Municipal Primary) – Advocate for all children by voting
March 31 Deadline for Volunteer of the Year Award, Mentor-a-PTA Award, Advocacy Award, Outstanding Newsletter Award, Creative Teacher Grant, Day of Service Grant, and Healthy Minds Grant
March 31 Submit new membership dues at LouisianaPTA.org/membership.

April 2025

April TBA LAPTA Recognition of Award, Contest, and Grant Winners
April Transition time and planning for the year ahead
April 14 Winners announced for Volunteer of the Year Award, Mentor-a-PTA Award, Advocacy Award, Outstanding Newsletter Award, Creative Teacher Grant, Day of Service Grant, and Healthy Minds Grant
April 20 Easter Sunday
April 30 Submit officer data at LouisianaPTA.org/register.
April 30 Submit new membership dues at LouisianaPTA.org/membership.

May 2025

May Transition time and planning for the year ahead
May 1 LAPTA Healthy Minds Grant Winners Announced
May 5-9 Teacher Appreciation Week
May 31 Submit new officer data at LouisianaPTA.org/register.
May 31 Submit new membership dues at LouisianaPTA.org/membership.

June 2025

June 1 Search “Summer Learning Programs” at PTA.org and publicize in the local community.
June 19-23 Join LAPTA at the National PTA Convention in Pittsburgh, PA
June 30 Submit new officer data for 2025-26 at LouisianaPTA.org/register.

Communications and Social Media

Social Media platforms provide an interactive means for PTAs to connect with both current and potential members. Through these channels, PTAs can share information, photos, and videos to enhance membership, communication, fundraising, visibility, feedback collection, and networking. Use social media to educate, remind, and acknowledge members. Continuously monitor your platforms and provide credit to original content creators when drawing inspiration. When using ideas from others, include links to the source and the author's name and organization. Maintain professionalism and respect in both content and comments with consistent PTA branding.

The primary objective is to raise awareness, encourage participation, and boost PTA membership. Social media accounts must clearly include either "PTA/PTSA" or "Parent Teacher Association" to distinguish them from the school. Content must adhere to all school and school board rules, guidelines, and policies. The school's social media accounts may not include PTA in their name. The principal is responsible for the accuracy of school information and compliance with the State Education Code and school district policy, while the PTA president is responsible for the accuracy of PTA information and compliance with PTA policies.

All PTA social media posts must adhere to principles of respect, truthfulness, discretion, and responsibility. These posts should remain non-commercial, non-sectarian, and non-partisan and be in agreement with PTA policies.

Account Administrators: PTA Executive Committee or Board Members must oversee social media accounts with a minimum of two administrators per account. The PTA retains authority over these accounts, and local PTA Units must maintain a cooperative relationship with their school principals, informing them of any online accounts. **At the end of the officers' terms, they must immediately turn over Social Media accounts to the new Board.**

Communication Strategy: When preparing to share content on social media, consider what information would be most beneficial for your members and which communication methods will be most efficient. To ensure inclusive outreach, use various communication channels, recognizing that not all communities have equal access to technology. Additionally, be mindful of cultural and language variations, translating materials as necessary. Local PTA Units are encouraged to establish an online presence via social media and other digital platforms.

Select PTA representatives willing and capable of creating high-quality basic social media posts. While constructive disagreements can stimulate ideas, refrain from personal attacks. Promptly address inappropriate messages or misuse of the PTA brand. Be prepared to respond to negative or inaccurate posts, when necessary, but remember that not all negative comments warrant a response.

Balancing personal and professional life on social media can be challenging. To avoid confusion, establish clear guidelines for volunteers, ensuring they understand expectations. When volunteers communicate on social media without representing the PTA, they should use a disclaimer to clarify that their statements reflect their own views. If an individual speaks on behalf of the PTA, this should also be clearly stated.

Privacy and Permission: Refrain from posting photographs or images of volunteers, families, children, etc., on social media without obtaining their explicit consent. Secure written consent forms at events or at the start of the school year, granting the rights to use and share pictures. Avoid discussing situations on social media that could identify individuals. When sharing content from other sources, assume it is copyrighted and provide proper source citation or link to the original material. Obtain additional coverage for Media Liability from your insurance provider.

- Adhere to PTA policies regarding noncommercial, nonpartisan, and nonsectarian content.
- Use the PTA logo in all communications and state when someone is speaking on behalf of the PTA.
- Create visually interesting communications with careful use of photographs, bullets, quotes, and graphics.
- Posts should be PTA-related such as flyers, events, grants, PTA and school deadlines, and other information valuable to PTA members. Keep the message brief and to the point with current information.
- Have at least two administrators for each. Have 2 or 3 people proofread before posting.

Do not include photographs of or specific information about adults or students without written permission.

Partnering with Administrators

Engage purposefully and build a strong partnership with the school's principal by doing the following.

- Collaborate on Planning: Work together to establish administrative goals and to involve families.
- Tap into Available Resources: Review LAPTA and National PTA programs at PTA.org/programs.
- Maintain Professional Communication: Always be composed and calm and communicate intentionally.
- Emphasize Independence: PTA is an autonomous child advocacy group under LAPTA and National PTA.
- Establish Regular Contact: Schedule monthly meetings with effective and routine communication.
- Increase Visibility: Have the principal provide reports at PTA meetings and contribute articles to the PTA newsletter. Host a "Coffee with the Principal."
- Promote Family Engagement: Share the National PTA Standards for Family-School Partnerships materials.
- Maintain Alignment: Summarize discussions and confirm any action taken by the PTA.
- Request Participation in Teacher Meetings: Request the opportunity to address teacher meetings.

Intentionally do NOT do the following:

- Be adversarial: Find common ground and be civil.
- Comingle funds: Mixing private and public funds is forbidden and illegal.
- Give up control of the checkbook: As a separate legal entity, the checkbook resides with the PTA Treasurer.
- Become an ATM: PTA funds are raised to further PTA's mission and goals, not to supplement school budgets. PTA is not a bottomless source of funding available for all administration requests. Raise awareness rather than raise funds.
- Cede control of PTA meetings: All members, even administrators, have the same rights at meetings. The PTA President runs the PTA meeting in compliance with PTA Bylaws and using [Robert's Rules of Order](#).
- Get in trouble with the IRS: Know the IRS rules. PTA's funds are not school funds. Only use the PTA's EIN.
- Open the PTA to theft: No administrator wants to deal with the negative publicity surrounding a PTA's poor money management. Ensure financial reports and audits occur regularly.
- Entangle administration in personality issues: Sometimes personal issues interfere with PTA function. Work through any personal problems without involving administration. Seek help from LAPTA if needed.

Partnering with Teachers

The success of the PTA hinges on the strong partnership between the PTA and the school's educators.

- Collaborate on Planning: Working together to involve parents and the community in supporting teachers.
- Invite Teacher Engagement: Ask teachers to attend meetings and join PTA by highlighting the value of PTA.
- Identify Volunteer Opportunities: Recruit volunteers to assist teachers as allowed by administration.
- Show Respect: Express appreciation for teachers and their valuable contributions to student success.
- Solicit Feedback: Seek input from teachers on PTA initiatives through surveys and other channels.
- Foster a Sense of Community: Organize informal social gatherings, fun nights, and outings.
- Express Appreciation: Thank teachers for their dedication. Plan meaningful activities during Teacher Appreciation Week and acknowledge their hard work.
- Demonstrate Cooperation: Recognize that the PTA-teacher relationship is a partnership aimed at supporting teachers. Approach all interactions with teachers in a spirit of cooperation and collaboration.

Intentionally do NOT do the following:

- Criticize teachers for missing PTA meetings: While attendance at PTA meetings is a good goal, 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 their classrooms should not be tied to teacher's membership in PTA.
- 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 the 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. 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 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 everyone.

A conflict of interest exists when a Board Member participates in the deliberation or decision of any PTA issue 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.

When a conflict arises, the Board Member declares the conflict to the Board. The Board then considers the situation and debates the severity of the conflict. During discussion and deliberation, the person temporarily leaves the meeting. The Board Member with the conflict may not use their personal influence or position to impact the outcome of a vote. The Board discusses the conflict and then makes a motion to allow the Board Member to remain on the Board or to be removed from the Board. The person returns after the vote is complete and informed of the results. **The minutes of the meeting must include any declared conflict of interest, the motion made to accept or remove the person from their position on the Board, and the resulting vote. Removal of a Board Member is effective immediately. They shall turn over to a member of the Executive Committee all records, books, PTA account access, and any other PTA materials pertaining to their position.**

See the Local PTA Unit Bylaws Template, Revised April 2024 in Article V, Section 4: **Termination of Membership** for details on how to address a member who has conduct that damages the value and goodwill associated with PTA or violates the purposes, policies, or Bylaws of PTA.

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

17. Abide by and represent our PTA Bylaws, LAPTA policies, positions, procedures, and National PTA purposes and mission statement;
18. 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 and funds are involved;
19. Not misuse the PTA's federal tax-exempt status for personal or unauthorized purposes nor disburse funds for any purpose other than the authorized budgeted items;
20. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA;
21. Publicly present a united front on decisions made as a Board;
22. Maintain confidentiality as a Board Member;
23. Follow the LAPTA and school district guidelines for fundraising; and
24. Abide by the following **Conflict of Interest Policy**:
 - i. Board Members and their families shall not use their relation to this PTA for financial, professional, business, employment, personal, or political gain;
 - j. Board Members must declare conflicts of interest to the PTA Board, stating the nature of the conflict and all pertinent information;
 - k. Board Members may not use PTA's name, influence, or resources for their benefit or gain when running for any publicly elected office or while serving as an elected official;
 - l. Board Members shall not directly or indirectly use their current PTA name or position for or against any specific candidate for elected public office, as that would be contrary to federal tax laws and PTA policies.

Active Affiliation Report *Very Important*****

PTAs are required to annually submit documentation to achieve Active Affiliation Status with both Louisiana PTA and National PTA. "Active Affiliation" signifies that the Local PTA Unit is up to date with its responsibilities to preserve its IRS status and its affiliation with Louisiana and National PTA. The Active Affiliation Report consists of nine items which are uploaded at LouisianaPTA.org/affiliation or by scanning the QR Code. Local PTA Units failing to maintain Active Affiliation will be subject to the Retention Plan. The deadline for submitting these files is October 31, 2024.



DUE OCTOBER 31, 2024

The following items are individually uploaded into the corresponding field. Please do not combine files. See further information at LouisianaPTA.org/affiliation.

28. MEMBERSHIP: Submit proof of paid dues which are paid to LAPTA at LouisianaPTA.org/membership.
29. LEADER REGISTRATION: Register all Board Members at LouisianaPTA.org/register. Officers are required.
30. BYLAWS: Submit the first page of the Bylaws with the LAPTA approval stamp.
31. TAXES: Submit proof of 2022 or 2023 filed and accepted IRS Form 990 tax filing.
32. BUDGET: Submit the 1) Local Budget Approval Form **and** 2) the approved Annual Budget.
33. AUDIT REPORT: Submit the Audit Committee Report for the previous year.
34. ARTICLES OF INCORPORATION: Submit the updated Articles of Incorporation from geauxbiz.com.
35. INSURANCE: Submit the insurance declaration page.
36. TRAINING: Submit proof of training for officers from LAPTA training or see LouisianaPTA.org/training.

Retention Plan

If a Local PTA Unit fails to submit the Active Affiliation Packet by the annual deadline, LAPTA will initiate the Retention Plan to guide units back to compliance. Maintain open communication with LAPTA while acquiring Active Affiliation status. For inquiries, email Affiliation@LouisianaPTA.org. The Retention Plan has five phases:

16. **Notification**: LAPTA notifies the PTA of the missed deadline and grants a 30-day grace period to submit the missing items.
17. **Restriction**: During a second 30-day period, the Local Unit must submit the outstanding items. Additionally, the unit will be ineligible for awards, programs, or grants administered by LAPTA or National PTA.
18. **Intervention**: The PTA will collaborate with LAPTA to establish a Plan of Action, specifying new deadlines for resolving the outstanding issues.
19. **Restructure**: Should the PTA fail to complete the required report, LAPTA may consider restructuring the PTA's leadership or advancing to the Dissolution Phase early.
20. **Dissolution**: A Local Unit's charter may be revoked and their LAPTA associated IRS 501(c)(3) nonprofit status may be forfeited under certain conditions, which include failing to achieve Active Affiliation for three consecutive years, refusing to implement the Plan of Action as agreed upon, or non-compliance with the Purposes and Principles of PTA outlined in the Bylaws adopted in May 2024 (Articles II and III). In such cases, the PTA must discontinue using the PTA name and close its bank accounts, with any remaining funds to be donated to another PTA.

Visit LouisianaPTA.org/affiliation for details.