

2025-26 PTA Leader TOOLKIT

LOUISIANA PTA

Section 2: President
LouisianaPTA.org/president



Louisiana
PTA[®]
everychild.onevoice.®

Index

Leadership Traits	10	Parliamentary Procedure	19
Essential Knowledge.....	11	Roberts Rules of Order Simplified	20
Getting Started	12	Agendas.....	21
President's Binder and Files	12	Motion Summary Chart	22
Building the Board of Directors (BOD)	13	Problem Solving.....	23
Pick Your PTA Programs.....	14	Partnering with Administrators and Teachers	24
Training (Required for Officers)	14	Icebreakers	24
Membership Dues & Givebacks.....	14	Inclusion (DIO)	25
Finances	15	President's Checklist.....	26
Fundraising Strategies	15	LAPTA Calendar	28
New Givebacks.com.....	16	Year-End Checklist and Transition Guidance.....	29
Meeting Types	16	Sample Agenda.....	30
Know Your Bylaws and How/When to Update Them ..	17	Sample Meeting Script.....	31
Standing Rules	18	Sample Passwords and Accounts Summary	33
LA Secretary of State Annual Report	18	Communications & Social Media Policy.....	34
Active Affiliation Report Due October 31.....	19	Confidentiality, Ethics, & Conflict of Interest Policy....	35

Growing the Future Rooted in Tradition

The 2025-26 theme for Louisiana PTA is “**Growing the Future Rooted in Tradition.**” Using unique Louisiana imagery, our theme invokes the PTA’s longstanding history of advocating for children and highlights the goal of nurturing future generations. PTA’s philanthropic work is an opportunity to give selflessly and to positively affect the lives of children. Become part of something meaningful and important where your contribution matters.

The Louisiana PTA Board is planning its future. 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, email President@LouisianaPTA.org. We all do it because it’s enjoyable, and you are part of our future!



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. Leaders actively **seek successors and new additions** to their Board of Directors, proactively inviting individuals to join. Competent and effective leaders possess a spectrum of attributes, such as:

1. **Self-Awareness:** The ability to acknowledge one's strengths and weaknesses.
2. **Vision:** Demonstrate a deep understanding of future goals and how to achieve them.
3. **Relationship Building:** Cultivate trust, mutual respect, and patience with others.
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. **Motivational:** 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:** Generate innovative ideas and alternatives with a novel approach 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.
14. **Initiative:** Take proactive, unprompted steps, consistently delivering outstanding performance.

Essential Knowledge

The PTA President serves as the presiding officer responsible for overseeing both the Board of Directors (BOD) and General Membership. The President bears the responsibility of thorough preparation which includes the distribution of all relevant materials to the appropriate officers or committee chairs and serves as the vital link between the PTA and the principal. The President collaborates closely with fellow Board Members to effectively steer the PTA's affairs. The term of office aligns with the fiscal year from July 1 to June 30, as specified in the Bylaws and with the IRS.

The Local PTA Unit and its members constitute an integral part of LAPTA and National PTA. The members serve as the bedrock of PTA. Building a well-informed team of individuals dedicated to the welfare of all children is the primary objective. A membership actively engaged in both the school and the broader community lays the groundwork for the betterment of future generations. Success hinges on the active participation and cooperation of officers, committee chairs, and members. Embracing a perspective that extends beyond parents and teachers to encompass the entire community opens doors to a multitude of opportunities. By expanding its membership base, the PTA's collective voice gains strength, influencing policymakers at all levels to prioritize the well-being of all children.

LAPTA is a member-based association that advocates for children. PTA supports legislation that increases opportunity for all children, regardless of race, creed, or religion. A Local PTA Unit may give active support to any or all items on the National PTA adopted legislative program. It should not, however, oppose items that have been adopted by National PTA or LAPTA. A Local PTA Unit can and often should take local action if its members approve. As an association, it may act on local issues if they affect the education, health, or welfare of children and youth. In all issues, the following policies must be observed as required by the IRS for all nonprofits:

- **Nonpartisan:** PTA takes a stand on issues and principles, not on candidates or political parties. Issues may become identified with partisan politics because of the differing approaches to the solution, but the basic principles involving the welfare of children are matters of public concern and, therefore, PTA business. A PTA may sponsor a public forum meeting to expose the community to the candidates running for school board. See details on hosting a public forum at LouisianaPTA.org/advocacy.
- **Nonsectarian:** PTA welcomes into membership those who represent a diversity of cultures, ethnicities, and political and religious beliefs. Membership in PTA is open, without discrimination, to anyone who believes in and supports the mission and purposes of PTA.
- **Noncommercial:** The name "PTA®" is a registered trademark, and the names of its officers may not be used in conjunction with the commercial activities of other organizations including the promotion of their goods and services. This policy should be applied with judgment, discretion, and common sense, recognizing that it is not meant to prohibit all contact or cooperation with such groups. Before accepting donations of goods or services, a PTA should consider whether acceptance might be construed as an endorsement of the provider.

Some common terms are:

- **PTA** stands for Parent Teacher Association and was established in 1897.
- **A charter** is issued when a group completes the initial formation requirements for a Local PTA Unit.
- **Bylaws** provide the rules for the PTA, describe the rights and duties of its members, and are the backbone of PTA. LAPTA requires units to review their Bylaws, update them if needed, and submit them to the LAPTA for approval every three years. Know the Bylaws and use them often. Annual review of the Bylaws ensures that they reflect the way the PTA functions and checks for the need for any amendments.
- **Employer Identification Number (EIN)**, also known as a Tax Identification Number, is a nine-digit number assigned to business entities by the Internal Revenue Service (IRS). A PTA's EIN identifies it as a tax-exempt 501(c)(3) nonprofit organization which designates its donations as tax-free for its donors. Local PTA Units fall under Louisiana PTA's tax umbrella.
- **Local Unit Registration Number (LUR)** was issued by National PTA when the Local PTA began. It is also known as a National PTA ID#. This eight-digit number never changes and is kept permanently.
- **Chair** is the lead person of a committee or meeting.

Getting Started

Upon assuming the role of President, get started by meeting with the outgoing President to establish a formal transition date for the records. Facilitate meetings between Board Members and their predecessors to hand over Procedure Binders and pertinent information. Read the Bylaws and check the expiration date as they expire every three years. See LouisianaPTA.org/bylaws.

Get organized. To streamline the workflow, set up a dedicated workspace for presidential duties. Create folders on both your computer and cloud storage for efficient file sharing. Invest time in organizing the physical workspace at home where the Presidential binder and files will be stored. Stay well-informed and connected within the PTA community by exploring resources like LouisianaPTA.org, PTA.org and join the Facebook “PTA Local Leader Group” to engage with fellow PTA leaders. Immediately register at LouisianaPTA.org/register. Review all sections of the LAPTA Toolkit which are posted at LouisianaPTA.org/toolkits.

Financial Check Up: Coordinate with the Treasurer at the beginning of the fiscal year to update the signatories at the bank. Authorized bank signers may have debit cards issued in their name and the name of the PTA if the local school board allows it (not permitted in Caddo Parish.) Appoint the Audit Committee Members at a meeting by making a motion. Arrange for documents to be delivered to the Audit Committee and give ample time for the report to be completed before the Affiliation Report is due October 31. See LouisianaPTA.org/treasurer.

Start Your PTA Work: Conduct a meeting with the newly elected officers within 30 days of the election. Schedule a planning meeting for the Board of Directors (BOD). The BOD includes the elected officers (President, Vice-President, Treasurer, and Secretary), the principal, parliamentarian, Standing Committee chairs, and additional committee and chair positions such as historian, faculty representative, and student representatives. Caddo Parish designates all principals as an additional, unelected PTA Vice-President. Review the current Bylaws and create Standing Rules. The Bylaws contain many job responsibilities, timelines, and due dates. Reviewing them together gets everyone on the same page with the same expectations. Determine the goals for the year and the PTA programs to be implemented. Make sure Board Members know to check with the President before speaking on behalf of the PTA, sending correspondence, or discussing PTA business with the principal. When filling open positions on the BOD, strive for a balance of experienced and new members who represent the community’s demographics. All Board Members are encouraged to register each year with LAPTA at LouisianaPTA.org/register. Only officers are required to register.

Meet with the principal to discuss school plans for the year. Establish a calendar in cooperation with the principal to include school holidays, Board Meetings, General Membership Meetings, PTA special events, election dates, Budget and Nominating Committee dates, PTA program deadlines, PTA Founders’ Day on February 17, membership dues deadlines, LAPTA training, and LAPTA grants, awards, and contests. Reference the LAPTA calendar at LouisianaPTA.org/calendar. Continue to meet regularly with the principal.

President’s Binder and Files

Keep an organized and up-to-date binder and files, which may be paper and/or digital formatting. Include at least the following:

- Accounts & passwords summary sheet; Board roster
- Blank Expense Forms and Deposit Forms (fillable PDFs at LouisianaPTA.org/treasurer)
- Charter information such as IRS tax filings, Bylaws, Standing Rules, LAPTA Toolkit (all sections), Secretary of State Articles of Incorporation, Annual Report, insurance policy, and past Audit Reports
- All agendas and minutes from Executive Committee, Board of Directors, and General Membership Meetings
- Approved budget, Budget Approval Form, and budget reports from all meetings
- All committees with their information and details
- Calendar with school, PTA, and LAPTA dates
- Confidentiality, Ethics, and Conflict of Interest Policy signed by the BOD; Inventory Accountability Form
- Membership roster, miscellaneous papers, and correspondence.

Building the Board of Directors (BOD)

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

There are two primary categories of PTA committees: **Standing Committees**, which engage in continuous year-round activities, and **Special Committees**, which focus on specific short-term tasks. Note that the President is a member of all committees except some Special Committees. See more in the *LAPTA Toolkit: Board of Directors*. The number of Standing Committees required to effectively handle the tasks of the PTA relies on several factors, including the size of the membership, the scope of PTA programs and activities, and the interests of the community. Following the election, the newly appointed President convenes a meeting with the recently elected officers to designate chairs for the Standing Committees and addresses any vacant positions. Appointments are subject to approval by the BOD.

To identify required committees and their responsibilities, refer to the Bylaws. Committee chairs should represent a diverse cross-section of the membership enlisting both experienced and new members. Solicit from various sources, including past and current Board Members, the principal, teachers, office staff, and the membership at large. The PTA is an inclusive organization that welcomes participation from all individuals. Efficiently filling all Board positions promptly allows everyone to participate in LAPTA training in August and provides time for planning the upcoming year's activities. Always encourage newcomers to become involved.

To achieve shared objectives, access valuable resources like the LAPTA Toolkit, PTA.org, know the PTA's Purposes, and engage in productive collaboration with BOD. The committees should align with the unique requirements, initiatives, and endeavors of the PTA. Use only those committees that are needed. Here are some suggestions.

- | | | |
|--------------------------------------|-----------------------------|-----------------------------------|
| • Advocacy | • Historian | • Public Relations |
| • Arts Education/Reflections | • Hospitality | • Room Representatives |
| • Beautification | • Library & Literacy | • Spiritual/Character/Citizenship |
| • Diversity, Inclusion, and Outreach | • Male Engagement/Dads Club | • Student Representative |
| • Family Engagement | • Membership | • Teacher Liaison |
| • Fundraising | • Mental Health | • Volunteer |
| • Handbook/Directory | • Parent Support/Education | • Website and Social Media |
| • Healthy Lifestyles | • Programs | • Youth Protection |

The **principal** holds a central role within the BOD and often serves as the sole constant presence in a dynamic leadership team. Cultivating a strong collaborative relationship between the principal and a thriving PTA can significantly enhance the educational environment for both students and families. Regular communication and cooperation between the PTA President and the principal is key. Presidents need to recognize that they are guests in the principal's school, while the principal respects that the PTA operates under its Bylaws. This may impose limitations on its response to certain school requests. Refer to the "Dos and Don'ts of Partnering with Administrators" later in this section. Additionally, a teacher may serve on the BOD, and a student or Student Council may also be part of the BOD. Detailed advice on interacting with teachers can be found in the "Dos and Don'ts of Partnering with Teachers" section later in this section.

For effective communication with the BOD, use apps like GroupMe or Band App. Use PTA emails that can be passed down from year to year rather than relying on personal emails. Maintain a record of all passwords and recovery information for these accounts.

Work with the local PTAs at your feeder schools, which are those schools that the students did attend before or will attend after the current school. Work with feeder schools when planning the year and scheduling events. Consider hosting joint events, such as an End-of-Summer Picnic to buy uniforms, have a uniform swap or used uniform sale, join PTA, and pre-pay for PTA events offered throughout the year. Share decorating items between PTAs rather than unnecessarily purchasing similar items. Try and spread out your events and when you're asking for money. Get creative in supporting each other!

Pick Your PTA Programs

Planning and promoting PTA programs and events is the fundamental duty within PTA that creates the pathway toward advocating for children their education. Programs serve as informative platforms that keep membership well-informed about pertinent issues and developments within the education sector. They function as educational tools for parents and equip them with valuable insights and skills to navigate the complexities of the educational journey. PTA programs enrich the lives of children and fortify the connection between home and school. Increased family engagement directly correlates with elevated student achievement and stronger bonds between families and schools.

Achieving success in PTA hinges on wholeheartedly embracing the PTA's core mission which is to make every child's potential a reality. The National PTA Programs serve as invaluable conduits, offering access to a plethora of engaging, educational, and enjoyable opportunities. These programs serve as a source of inspiration and a means to acknowledge and influence the lives of all students and their families. The array of programs available lets the PTA leave a significant and custom mark within their communities.

Here is a summary list of National PTA programs. Find more information at [PTA.org/programs](https://pta.org/programs).

- **School of Excellence**: Gain national recognition for demonstrating excellence in family-school partnerships.
- **Reflections Art Program**: Encourage and celebrate student participation in arts education.
- **Family Reading Experience**: Engage families of K-5 students in fun, interactive activities for core reading skills.
- **STEM + Families**: Explore science, technology, engineering, and math (STEM) with interactive activities.
- **Healthy Lifestyles**: Learn about the three pillars of Healthy Lifestyles: body, mind, and earth.
- **PTA Connected**: PTA Connected strives to help children act safely, responsibly, and thoughtfully online.
- **National PTA Grants**: National PTA offers many grants. See [PTA.org/grants](https://pta.org/grants) for details.

Training (Required for Officers)

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 acknowledgement of training for the officers. See LouisianaPTA.org/training. Sources for training are:

- 1) **LAPTA Leadership Development Days**: In-person training in southern and northern Louisiana in August.
- 2) **LAPTA Virtual Training Meetings**: Held in September with the recordings posted at LouisianaPTA.org/training. Watch the recordings or read the attached course documents.
- 3) **LAPTA Individualized Training**: LAPTA offers one-on-one training as needed. Email President@LouisianaPTA.org.

Membership Dues – NEW SUBMITTAL PROCESS with GIVEBACKS.com

Membership is the backbone of PTA and submitting dues is an affiliation requirement. Not submitting dues is fraud and puts the PTA at risk of losing its nonprofit status. Membership is good for one year starting on July 1 and expiring on June 30. There may be different types of membership with the specific amounts itemized in the PTA's Bylaws. When a member submits dues to the Local PTA Unit, that PTA is required to submit \$4.50 per person in dues to LAPTA. This amount includes \$1.25 for LAPTA and \$3.25 for National PTA which LAPTA pays on behalf of the PTA. All members become members of the Local PTA Unit, LAPTA, and National PTA.

To submit dues, go to LouisianaPTA.org/membership. Create an account at Givebacks.com. PTAs may collect dues however it works best for their membership. This may include paper forms paid with cash, checks, or credit cards if the PTA has that set up. LAPTA encourages PTAs to use Givebacks.com to accept electronic (cashless) purchasing by setting up a custom website. For complete details, visit LouisianaPTA.org/givebacks. If a PTA currently uses CheddarUp.com or PTBoard.com, LAPTA requests PTAs to switch to Givebacks.com. It is required that PTAs at least use Givebacks.com to submit membership dues and the Affiliation Report to LAPTA. This is new for 2025-26 and we appreciate PTAs making this accommodation.

Finances

The President needs to understand the Treasurer's role. Refer to LouisianaPTA.org/treasurer for complete details. PTAs must establish a budget approved by its General Membership in the beginning of the year. When creating the budget, know the goals of the PTA and then allocate funds to align with the goals. Once drafted, the Treasurer presents it to the BOD for input before being brought before the General Membership for final approval. The budget is adopted with a majority vote of the members at a General Membership Meeting. The budget is presented item by item to allow for amendments or discussion. The PTA's expenses must adhere to the final budget. All funds do not need to be spent each year. Remaining funds can be carried over to subsequent years. Before budget approval is obtained, the PTA may not exceed the amount designated as "Startup Funds" in the previous year's budget.

Amending the Budget: The budget serves as a projection of anticipated income and expenses for the fiscal year. In cases where unforeseen expenses arise, revenue fluctuations occur, or a modification to an already approved expense is required, the budget requires an amendment. The amendment process calls for a vote from the General Membership, either during a Regular or a Special Meeting. To amend a previously adopted budget, an affirmative two-thirds vote is required. Any proposed additional expenditure or fundraising initiative that falls outside the existing budget parameters must first obtain approval before spending that money.

Budget, Books, and Records: The Treasurer keeps the financial records which include the checkbook, deposit forms, expense forms, approved budget, budget reports, IRS tax filings, and others. LAPTA recommends the use of online accounting software such as Givebacks.com, MoneyMinder.com or WaveApps.com. All records are shared with at least the President and Secretary. The Treasurer prepares budget reports for all meetings showing actual income and expenses compared to the budgeted income and expenses.

PTA Audit: The primary objective of an audit is to verify the precision of the Treasurer's financial records and show the PTA's finances are being handled professionally and ethically. A committee of three people, none of whom possess check-signing authority, validates the records using the method outlined in the LAPTA Toolkit: Treasurer. The annual audit must be submitted to LAPTA by the end of October, and the annual results communicated to the membership.

Fundraising is not the primary function of the PTA. The true essence of PTA doesn't reside within its financial reserves but rather within the collective energy, ingenuity, and commitment of its members to enhance the well-being of children. Financial resources are used to support the initiatives of the PTA. Do not engage in fundraising solely for the sake of accumulating funds. National PTA recommends a thoughtful approach when planning the year's activities by following the **three-to-one rule**: for each fundraising activity, there should be a minimum of three non-fundraising projects aimed at supporting the PTA mission. See LouisianaPTA.org/funds for suggestions.

Obligating Future Boards: As a 501(c)(3) organization, a PTA cannot obligate future Boards to a specific expenditure. A future BOD is not required to spend funds as designated by the previous BOD. Large, long-term projects should be very carefully planned and undertaken only if there is dedicated support from the General Membership. Use a separate bank account for a special purpose, especially if the donors specified what their donation would support.

Fundraising Strategies

Ask seven questions to evaluate fundraising strategies so that they align with the needs of the students, school, and community. Use these questions to guide the development of effective fundraising approaches to secure the necessary funds and to promote philanthropy. See LouisianaPTA.org/funds for more suggestions.

1. What values are the basis for why you are raising funds? Focus fundraising efforts on a clear purpose. The first step is to identify the specific need, opportunity, or problem that requires attention. There should always be a compelling reason and need behind it. Once the problem and solution are identified, consider the values and concerns that potential donors should share to support this cause. Engage volunteers in identifying groups within the school and community that hold these key values and concerns. Finally, choose fundraising strategies that resonate with the identified values and effectively draw prospective donors' attention to the cause. People allocate their time and resources based on their values. Are the fundraising strategies aligned with these values, and do the volunteers fully grasp the underlying need?

2. What is the cost per dollar raised for this fundraising activity? Effective fundraising requires careful consideration of the cost-effectiveness of each activity. The math is straightforward: divide the expected costs by the anticipated revenue. In most product-based fundraisers, a significant portion (often 50% or more) of the revenue goes toward producing the goods being sold. Consider the non-monetary costs, such as the time spent by students, parents, organizers, teachers, and advisors, even though time isn't a direct financial cost.

3. Does this fundraising strategy give donors options? Does it empower them to contribute more, whether it's money or time? Provide donors with the freedom to determine their level of support. Donors should have the autonomy to decide how much they want to contribute, how often, and the extent of their involvement. This flexibility ensures that their support aligns with their commitment to the PTA, its goals, and its programs.

4. If students are involved in the fundraising activity, are they learning about philanthropy? Is the focus on giving rather than receiving? Philanthropy plays a significant role in our society, yet students often lack exposure to and encouragement for careers in this field. Students benefit from exposure to potential philanthropic careers. Philanthropy enriches our lives and serves others by giving resources that include time and money. Today's students are tomorrow's donors and members of service clubs, religious organizations, and nonprofit Boards. If students understand that their fundraising activities serve as valuable practice for their future roles in philanthropy, they will approach these activities with greater dedication.

5. Does this fundraiser involve incentives or prizes? Be cautious about introducing sales incentives. They can shift the focus from values and giving to competition and personal gain. Maintain a primary focus on the act of giving.

6. Have you considered the integrity of businesses offering support? Collaborating with local corporations can be a beneficial fundraising strategy that showcases community support and raises awareness of the school's needs. Evaluate any company to ensure alignment with the PTA's values and principles.

7. How will this fundraiser and the projects and programs it supports benefit the community? School fundraising initiatives should have a positive impact on the community. Improving schools directly enhances the community and connects the school to the community.

Source: *Questions to Consider When Developing Fundraising Strategies (PTA.org)*, by David G. Bauer

NEW Givebacks.com

Louisiana PTA encourages Local PTA Units to utilize online platforms to track finances and to collect membership dues. While there are several platforms, LAPTA partnered with Givebacks and now requires PTAs to use Givebacks to submit membership dues and the Affiliation Report. The PTAs can decide how else they'll use Givebacks which includes financial tracking software for free and is comparable to Quick Books and MoneyMinder. The annual fee for a MoneyMinder Pro account increased to \$299, so there is considerable savings with Givebacks. PTAs should use an accounting software that tracks expenses and deposits and runs budget reports. Another free accounting alternative is the Wave App at waveapps.com. See LouisianaPTA.org/givebacks for complete details.

CheddarUp.com and PTBoard.com are sites similar to Givebacks that allow a PTA to easily create a website to sell items, collect membership dues, upload documents, and information collecting forms. The account must be in the PTA's name under their EIN. A personal Social Security Number is required to open an account, which must come from an authorized bank signer and be updated to a current officer. Use an email that can be passed down to future Boards. All deposit transfers must occur at least monthly directly to the PTA bank account and with a Deposit Form itemizing the line item totals for budgetary tracking. The spreadsheet reports are compatible with Microsoft Excel or Libre Office which is free (libreoffice.com).

Meeting Types

Meetings serve as the forum where members come together to make decisions guiding the PTA's actions and to stay informed about the PTA's activities conducted on their behalf. Participation in meetings is exclusive to its members as listed below. While nonmembers may attend, their involvement is limited unless they are granted a Courtesy Seat or appear on the agenda. The meeting types based on membership are:

- **Executive Committee Meetings** are for elected officers listed in the Bylaws (and the principal in Caddo Parish).
- **Board of Directors (BOD) Meetings** are the elected officers, principal, parliamentarian, Standing Committee chairs, and other positions such as faculty and student representatives. This can be amended as needed.
- **General Membership Meetings** encompass all paid members who are in good standing with the PTA.

All of the above meetings can have regular or special meetings. **Regular meetings** are those set up by the Bylaws and the BOD at the beginning of the year. **Special meetings** are those called, with appropriate notice, to quickly address a specific item of business with its provisions listed in the Bylaws.

Virtual meetings are allowed. 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. Meetings may be recorded by one Board Member for the purpose of accurately documenting business and then destroyed upon completion of the minutes.

Hold the initial **Board of Directors Orientation Meeting** early in the year. Give a warm welcome and introduce everyone or have them introduce themselves. Review the PTA's structure, policies, procedures, Bylaws, and possible Standing Rules. Give a comprehensive overview of an effective and functional Board and leadership traits. Emphasize the significance of maintaining a procedure binder which may be digital. Specify BOD roles and responsibilities such as collaborating with school admins, attending PTA training or e-learning, promptly responding to emails, texts, and phone calls, and meeting attendance. Clarify who reports what and to whom. Highlight the membership policy mandating all Board Members to submit their membership dues. Review the Deposit Form and Expense Form. Present the proposed PTA calendar. Share the Board roster with emails and phone numbers. Review and sign the Confidentiality, Ethics, and Conflict of Interest Policy. Request Board members register with LAPTA at LouisianaPTA.org/registration. This registration is only required for officers.

Know Your Bylaws and How and When to Update Them

Bylaws are the fundamental governing rules of a PTA that relate to conducting the PTA's business and governance of its affairs. They define the primary characteristics of the PTA, prescribe how the PTA functions, and include all rights and responsibilities of the membership. All Presidents need to read and understand their Bylaws and follow the established rules and requirements detailed in the Bylaws.

The Bylaws must be updated every three years by the General Membership. There is a required template created by LAPTA which includes required language that cannot be changed by the PTA. There are limited customizable fields for the PTA. Download a copy of your Bylaws or download the template at LouisianaPTA.org/bylaws. **Amendments** are added phrases or verbiage to the Bylaws or changes to the existing verbiage that may be added to the end of the Bylaws. This is separate from updating the Bylaws every three years. They may not conflict with National or Louisiana PTA Bylaws and need approval by LAPTA. A PTA may amend their Bylaws at any time. They require approval by the General Membership at a meeting with 20 days' notice with an affirmative two-thirds vote and final approval by LAPTA before it is implemented and incorporated into the official Bylaws of the PTA.

If your Bylaws are due to expire, take the following steps.

1. Appoint the Bylaws Committee of three people by making a motion. To approve the motion, an affirmative two-thirds vote is required at a BOD Meeting or a majority vote at a General Membership Meeting. Include experienced and knowledgeable PTA members on the committee. Obtain the official LAPTA Local PTA Unit Bylaws Template at LouisianaPTA.org/bylaws. The Bylaws Committee meets to complete the proposed Bylaws. Consider recommendations submitted by the Board of Directors and General Membership. For proposed amendments, all changes must meet the needs of the unit, have clear intent, and not conflict with the Louisiana and National PTA Bylaws. Amendments need to reference their article heading, section number, and line numbers in the Bylaws. The PTA can email the proposed Bylaws to LAPTA to check for any problems or conflicts before seeking approval by the membership.
2. Notify the General Membership in writing at least 20 days prior to the General Membership Meeting where the vote will occur to update the Bylaws. Share the proposed Bylaws with the membership for review.
3. At a General Membership meeting with a quorum, present the Bylaws and allow for discussion. Edits may be made 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. Amendments require an affirmative two-thirds vote.

4. Email the approved Bylaws Template and Approval Form to Bylaws@LouisianaPTA.org for final LAPTA approval. Give LAPTA 15 days to review and approve the Bylaws or amendments. Once approved, they will be stamped “APPROVED,” dated, and emailed to the PTA. This is the official copy of the Bylaws which expire in three years. Save the digital file in the PTA records and share with the Board. Delete the previous working or proposed versions of the Bylaws.

Here is a **sample** timeline and a timeline that the Local PTA can complete for their renewal.

- August 28: The Bylaws Committee is appointed at a BOD Meeting by making a motion with a two-thirds vote.
- September - November: Bylaws Committee meets to complete the Bylaws template. The committee can email the proposed Bylaws to LAPTA for review at Bylaws@LouisianaPTA.org.
- November 20: Publicize the date for the December 15 General Membership Meeting and post the proposed Bylaws for review by the membership.
- December 15: At the General Membership Meeting with a quorum present, review the proposed Bylaws and allow for discussions. Make a motion to accept the Bylaws. A majority vote is required. Complete Approval Form.
- December 16: Email the approved Bylaws and the Bylaws Approval Form to Bylaws@LouisianaPTA.org.
- December 28: LAPTA reviews the Bylaws, dates them, and emails the final approved Bylaws to the PTA.

Enter your dates here:

- _____ Date of 1st meeting when Bylaws Committee is formed.
- _____ Dates when the Bylaws Committee will meet to complete the LAPTA Bylaws Template.
- _____ Date at least 20 days before the General Membership Meeting when the meeting date is publicized and the Bylaws are posted for review by the membership.
- _____ Date of the General Membership Meeting when the Bylaws are presented and voted on.
- _____ Date Bylaws and the Bylaws Approval Form are emailed to LAPTA at Bylaws@LouisianaPTA.org.
- _____ Deadline for LAPTA to email the final approved Bylaws back to the PTA President.

Standing Rules

Standing Rules are detailed guidelines that contain additional information on who does what within the PTA. They set forth the procedures adopted to direct the PTA and to accomplish specific PTA work. They provide continuity and serve as a guide to ensure the orderly transfer of duties from one Board to the next. They are a valuable training tool for the orientation of new Board Members and may contain any traditions or specific information that pertains to the PTA. **See sample Standing Rules at LouisianaPTA.org/bylaws.**

Each set of Standing Rules is unique to its PTA. To adopt a set of Standing Rules, appoint a committee of at least three experienced, knowledgeable members of the PTA to prepare them. After the committee prepares the Standing Rules, they are presented to the Board for review and then to the General Membership for approval by an affirmative majority vote. Details and descriptions that would be helpful include any consistent person, date, location, time, event, activity, assignment, tradition, and process that occurs traditionally during the PTA year.

LA Secretary of State Annual Report

Louisiana law requires that all nonprofits register with the Louisiana Secretary of State’s office. There is a \$75 initial fee to file Articles of Incorporation with the Louisiana Secretary of State at GeauxBiz.com. **The PTA must file the Annual Report updating its officers yearly.** Visit Louisiana Secretary of State at GeauxBiz.com to renew, set up annual email reminders, update the officers, and pay a \$10 renewal fee plus a \$5 credit card processing fee if a check is not used. The Articles of Incorporation are kept permanently on file and are part of the annual Active Affiliation Report that is submitted to LAPTA. See LouisianaPTA.org/affiliation.

If you do not have the previous login, create a new login. Record the new login on the Password Summary file. After logging into geauxbiz.com under “Quick Links,” select “File Annual Report.” Or click “Get Started” button. Select “File an amendment, such as an annual report, with the Louisiana Secretary of State.” Follow the steps to update officer data. **If you need the NAICS number, use 813410 by selecting “Other (81), Civic & Social Organizations (813410).** Search the Secretary of State’s website for the PTA’s current filings [here](#).

Active Affiliation Report Due October 31

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 LAPTA and National PTA. The Active Affiliation Report consists of seven items which are uploaded at LouisianaPTA.org/affiliation through Givebacks.com. Local PTA Units failing to maintain Active Affiliation will be subject to the Retention Plan. The deadline for submitting these files is October 31, 2025.

To upload the files, log into the PTA's account at npo.Givebacks.com. If you need help creating the account, email Affiliation@LouisianaPTA.org. Once logged into the dashboard, on the left side menu, select Compliance>Submit Forms. You will then see the 7 required forms. See LouisianaPTA.org/affiliation for complete details.

1. IRS Form 990 Filing: Submit proof of 2024 or 2023 filed and accepted IRS Form 990 tax filing.
2. Audit Report: Enter the Audit Committee Report for the previous year.
3. LA Secretary of State Report: Submit the updated Articles of Incorporation from geauxbiz.com.
4. Bylaws: Submit the first page of the Bylaws with the LAPTA expiration date.
5. Insurance: Submit the insurance declaration page.
6. Budget: Submit the approved Annual Budget and details from the General Membership Meeting.
7. Membership and Officer Requirements: Submit membership totals, officer information, and training information.

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:

1. Notification: LAPTA notifies the PTA of the missed deadline and grants a 30-day grace period to submit the missing items.
2. 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.
3. Intervention: The PTA will collaborate with LAPTA to establish a Plan of Action, specifying new deadlines for resolving the outstanding issues.
4. 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.
5. 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 (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.

Parliamentary Procedure

All meetings, regardless of their formality, encompass certain fundamental components that facilitate their effectiveness. Employing parliamentary procedure safeguards the rights of participants and allows for productive discussions. PTA meetings are governed by Robert's Rules of Order, Newly Revised which sets the framework of meeting regulations. It states that all participants acknowledge the will of the majority and show respect for the opinions of the minority. The President, as the duly elected leader, is tasked with executing the PTA's will rather than imposing their own upon it. Authority resides in the office, not in the individual holding it. All members hold equal status within the PTA. No one has the right to do anything that prevents others from seeing or hearing the presiding officer or speaker. See all details on meetings at LouisianaPTA.org/meetings.

- Establish a consistent meeting schedule that accommodates the availability of both General Membership and Board of Directors Members to allow people to plan effectively. Possibly arrange meetings on multiple dates or at different times to enhance attendance. When scheduling, consult with neighboring PTAs, feeder schools, and community stakeholders for better coordination.
- The President shall serve as the presiding chair at meetings. In the President's absence, the Vice President assumes this role. The presiding officer is expected to be punctual, knowledgeable of the Bylaws and parliamentary procedure, and conduct meetings with composure, tact, and respect. They should demonstrate

courtesy, gratitude, and fairness, and present themselves in a neat and professional manner.

- **The agenda** sets the sequence of topics to be addressed. While the Secretary is authorized to create the agenda, most Presidents do it. Review the minutes from the preceding meeting to identify any unresolved business. Consult with officers and committee chairs to determine if they have reports to present. Include the names of individuals scheduled to speak on the agenda. Only call on those who have a report to present. Adhere to the agenda addressing and concluding each item before moving to the next.
- **A quorum** represents the minimum count of eligible voting members required to conduct business. Quorum for both Board and Executive Committee meetings is a majority (50% of the total roster plus one). Do not count anyone more than once. Quorum for General Membership Meetings is specified in the Bylaws. To establish quorum, every meeting should have the membership roster available and use a sign-in sheet to document attendance.
- **A motion** is a topic under discussion that needs a vote for approval. The appropriate language for initiating a motion is either "I move that" or "I move to." The individual proposing the motion usually initiates the discussion. See the following "Robert's Rules of Order Simplified" and "Motion Summary Chart" for further details.

Roberts Rules of Order Simplified

Every Motion Has 6 Steps: A **motion** is the topic under discussion that needs a vote. To speak, a member raises their hand (or stands) and waits to be acknowledged by the chair. It is never proper for a Board Member to raise their hand or rise to be acknowledged while another is speaking. If the point or motion is the type that can interrupt the speaker, the speaker can make the point or motion without waiting.

1. **Motion:** A member stands or raises a hand. Once recognized by the chair, they say their motion.
2. **Second:** Another member seconds the motion indicating that more than one person is interested in discussing.
3. **Restate motion:** The chair restates the motion and asks for discussion.
4. **Debate:** The members discuss and debate the motion which can be edited.
5. **Vote:** The chair restates the motion, asks for affirmative votes, and then negative votes.
6. **Announce the vote:** The chair announces the result of the vote (passed or failed).

Unanimous Consent is a quick way to pass a motion and may be used as often as possible. If a motion is minor or opposition is not expected, a call for unanimous consent may be requested. The chair proposes a given action, and then says, "Is there any objection?" If a member agrees, they remain silent which means consent. If all members are silent, the chair would say, "Hearing none, the motion is adopted by unanimous consent." If a member disagrees, they say, "Objection." The chair then takes a vote in the usual way.

When can the chair (President) vote on a motion? The President is a member of the voting body and has the same rights and privileges as other members. This includes the right to make motions, to speak in debate, and to vote on all questions. In BOD meetings with 12 or fewer members present and in committee meetings, the presiding officer may fully exercise these rights and privileges. At a large meeting with 12 or more people or at General Membership Meetings, the chair must be impartial and therefore refrains from debate and public voting. The chair may vote if the vote is by ballot or if their vote would affect the result by breaking or making a tie.

Types of Motions:

- **Main Motion:** Introduce a new item to be debated and voted on
- **Subsidiary Motion:** Change or affect how to handle a main motion and is voted on before main motion's vote
- **Privileged Motion:** Urgent or important matter unrelated to pending business
- **Incidental Motion:** Questions procedure of other motions and must be considered before the other motion
- **Motion to Table:** Kills a motion
- **Motion to Postpone:** Delays a vote to a later meeting or later time in the current meeting

Requesting A Point of ...

Certain situations need attention during the meeting, but they don't require a motion, second, debate or voting.

- **Point of Order:** Draws attention to breach of rules or improper procedure
- **Point of Information:** States additional non-debatable information to better inform members before a vote
- **Point of Inquiry:** Requests for clarification in a report to make better voting decisions
- **Point of Personal Privilege:** Addresses the comfort of the setting, accuracy of reports, or member's conduct

Minutes are the legal record of PTA meetings which document what was done at a meeting, not all that was said. The minutes *must* be accurate. They are recorded in the official minute journal or typed on a computer with an external backup. Succinctness in outlining the actions taken is the goal. The minutes start with key details such as the meeting type (Executive Committee, Board of Directors, General Membership), PTA name, date, time, location, the name of the presiding officer, chair, or Secretary, and attendance. All motions must be properly recorded, noting the name of the motion maker, if it was seconded, the final wording of the motion, and if the motion passed or failed. Other elements are the program topic, the presentation method, details about speakers and significant points discussed, and the time of adjournment.

Agendas

Agendas help business to be conducted efficiently. The following is the normal order of business. A sample agenda and sample meeting script are at the end of this section.

- Call to Order
- Opening (Mission statement; optional)
- Secretary Report and Approval of Minutes
- Treasurer Report
- President Report
- Principal Report
- Officers Reports
- Standing Committee Reports, as needed
- Special Committee Reports, as needed
- Unfinished or Old Business
- New Business
- Programs
- Announcements
- Adjournment

The Secretary's Report includes the distribution of the previous meeting's minutes. The "draft" minutes are reviewed, corrections are sought, and any corrections made, and if they were "accepted" or "accepted with corrections." They then become the official record of the PTA. Approval of the minutes does not need a motion.

The Treasurer's Report includes the current balance of available funds, detailing expenses and deposits in a manner that breaks down the amounts received or spent within each budget category. It compares the current actual amounts with the initial budget amounts. A motion to approve the financial statement or reports is only needed for the initial proposed annual budget. The financial report is then archived as part of the record.

Committee Reports

Committees may inform the BOD or General Membership on their progress. Typically, the committee chair delivers these updates. Not all reports demand action (motion). If a report calls for the approval of the members, the person presenting it makes a motion. Since the motion originates from a committee, there's no need for a second.

Adjournment

When there is no further business to come before the group, the meeting is adjourned. The presiding officer may state "If there is no further business, the meeting is adjourned." A motion to end the meeting is *only* needed if all items on the agenda were not covered. Many PTAs have a social time with refreshments after the close.

Motion Summary Chart

Action	What to Say	Can interrupt speaker	Needs a Second	Can be Debated	Can be Amended	Vote Count
Introduce a motion	"I move to..."		✓	✓	✓	Majority
Amend a motion	"I move to amend the motion by II (add or strike words or both)"		✓	✓	✓	Majority
Move item to committee	"I move that we refer the matter to committee."		✓	✓		Majority
Postpone item	"I move to postpone the matter until..."		✓	✓		Majority
End debate	"I move the previous question."		✓			2/3
Recess the meeting	"I move that we recess until..."		✓			Majority
Adjourn the meeting early before agenda is completed	"I move to adjourn the meeting."		✓			Majority
Request information	"Point of information."	✓				No vote
Overrule the chair's ruling	"I move to overrule the chair's ruling."	✓	✓	✓		Majority
Extend the allotted time	"I move to limit the time to ____ minutes per person."		✓		✓	2/3
Object to procedure	"Point of order..."	✓				Chair decision
Enforce the rules or point out incorrect procedure	"Point of order..."	✓				No vote
Personal preference - noise, distractions	"Point of privilege..."	✓				No vote
Object to considering an undiplomatic matter	"I object to consideration of this matter..."	✓				2/3
Verify voice vote with count	"I call for a division."					No vote
Table a Motion	"I move to table..."		✓			Majority
Take up a previously tabled item	"I move to take from the table..."		✓			Majority
Consider something out of its scheduled order	"I move to suspend the rules and consider..."		✓			2/3
To rescind a motion from a previous meeting	"I move to rescind..."		✓	✓		2/3
*Reconsider something already disposed of	"I move to reconsider our action to..."	✓	✓	✓	✓	Majority

*A motion to reconsider must be made during the same meeting and only once per motion.

Problem Solving

Addressing conflict within a Local PTA can be a time-consuming endeavor that can quickly deplete valuable resources. Most issues tend to revolve around communication breakdowns. Engage in direct conversations with the those involved rather than rely on emails or secondhand information to get to the root of the issue. Hear both sides before making a judgement and recognize when emotions might be clouding judgement or are being used to improperly influence yourself or others. When conflict is managed effectively, it can yield positive outcomes such as fostering growth, better communication, honing problem-solving skills, bolstering teamwork, and catalyzing change. To problem-solving within the PTA:

- Cultivate an open and friendly environment and respect other leaders.
- Clearly define expectations for desired outcomes.
- Empower individuals to take ownership of their tasks and to implement effective problem-solving solutions.
- Communicate any budgetary constraints or deadlines that affect a proposed project.
- Offer private correction and public recognition and praise.
- Actively listen to concerns raised by all parties involved.
- Investigate problematic situations from multiple perspectives.

How to Handle Disruptions in Meetings

An informed and vigilant PTA can mitigate disruptions, although complete avoidance may not always be feasible. Maintain composure in the face of interruption and allow disrupters to finish before suggesting that the speaker be given the opportunity to complete their sentence or thought. Show courtesy by refraining from interruptions. If disruptions persist, do not engage in a shouting match. In the case of whispered conversations in small groups, remain silent to regain the audience's attention and only resume speaking once the whispering subsides. If name-calling occurs, respond calmly with, "You are entitled to your own opinion, of course. Shall we continue?" When confronted with challenges to integrity, avoid defensiveness and emphasize that opinions differ from facts. Always maintain a sense of humor, as well-timed humor can deflate tension and diffuse challenging situations. Recognize the difference between facts and personal opinions/attacks.

The Bylaws state that participation in debates, making motions, engaging in debates, and casting votes is for members in good standing only. Bring this to the attention of the group or individual who isn't a PTA member. The Secretary should maintain a current roster of members who are eligible to vote. In instances where discussions might become contentious, establish and gain group consensus initially on debate guidelines.

The chair acknowledges that everyone has the privilege to either agree or disagree with the perspectives of a speaker. When a speaker articulates their viewpoint and does not solicit final judgment from the audience, interruptions are considered inappropriate. Board Members with expertise in parliamentary procedure should be available to assist the President by proposing helpful motions at suitable junctures. Sincere divergences of opinion can be deliberated upon at the conclusion of the meeting.

School Level Complaints

Occasionally, the PTA President or a Board Member may receive inquiries from individuals who have concerns or grievances related to school matters. PTA does not have the authority to address or manage issues pertaining to the school or its staff. Parents and students possess certain rights and responsibilities, and the PTA can serve as an informational resource. However, for resolution, individuals are encouraged to adhere to the established procedures within the school district. Direct the concerned person to the school district's official policy on addressing complaints. Typically, the established chain of command is the teacher first, the principal second, the principal's supervisor third, the superintendent fourth, and the school board fifth.

Termination of Membership

The Local PTA Unit Bylaws Template includes a provision on removing a member in Article V, Section 4. If a person damages the value and goodwill associated with PTA or violated the purposes, policies, or Bylaws of PTA, then their membership can be considered for termination. Termination requires an affirmative two-thirds vote by Louisiana PTA Board of Directors. This is to be used with great discretion and much restraint. Contact LAPTA promptly at President@LouisianaPTA.org.

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 attend meetings and contribute to the PTA newsletter.
- **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. 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 the PTA's poor money management. Ensure financial reports and audits occur regularly.
- **Entangle administration in personality issues:** Work through personal problems. 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. Acknowledge their hard work.
- **Demonstrate Cooperation:** Approach all interactions with teachers in a spirit of cooperation and collaboration.

Intentionally do NOT do the following:

- **Criticize teachers for missing PTA meetings:** PTA support does not have to include meeting attendance.
- **Bribe or blackmail:** Teacher recognition or support 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:** Schedule a meeting, provide notice, and do not interrupt class time.
- **Assume knowledge:** Keep teachers informed about PTA events, schedules, fundraising, or classroom activities. Help teachers understand the value PTA brings to their place of work.

Icebreakers

Icebreakers serve as an excellent kickoff for meetings, initiating participation and introductions before delving into the agenda. When selecting an icebreaker, consider the following factors:

1. **Primary Objective:** Is the main objective to facilitate getting to know each other, a better mutual understanding, infuse some friendly competition, to acquire new knowledge, etc.?

2. **Inclusivity:** Meeting attendees usually possess diverse abilities, interests, and beliefs. Ensure that the icebreaker is accessible to all and allows everyone to actively participate.
3. **Interactive:** Icebreakers excel at encouraging people to mingle and step outside of their comfort zones. Select an activity that lets participants establish new connections and relationships.

Icebreaker Examples:

- **What Do You Love?:** Each person states one thing that they love. Then others who also love the same thing raise their hands or otherwise gesture.
- **Meet Someone New:** Each person shares what month they were born and finds someone born the same month that they don't know. What's one other thing they have in common?
- **Name Tag:** As participants enter the meeting room, they can sign their name as usual and receive a different person's name tag. They should seek one another out and introduce themselves to other participants.
- **Name Game:** Everyone's name carries history, fun anecdotes, or familial values. Ask each attendee to introduce themselves then talk about how they got their name or the history behind it.
- **Just By Looking at Me:** The goal is to demonstrate that there is much more to a person than "meets the eye". Have attendees say, "My name is ____ and I am from _____. One thing you cannot tell just by looking at me is _____."
- **What's Your Favorite [Food Type]?** Each person shares their favorite ice cream or breakfast or whatever type or category of food. This can be used for nonfood items as well. Ask something simple and easy to identify.
- **Trivia Game:** Create a list of 15-20 interesting and fun facts related to a theme for a trivia game. Use an online trivia platform for a gameshow effect or use paper or whiteboards.
- **Guess Who:** Participants submit one or two personal facts, either on paper or by email or a google form ahead of time. Read one fact out loud and guess who the fact belongs to. That person then reads the next one.
- **Culture Club:** Participants break into small groups and share three of their families' cultural values (traditional foods, typical dress, histories, traditions, holidays, taboo topics, etc.). Each person shares their answers.

Inclusion (DIO)

PTA is a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child. DIO supports every child with one voice.

- **Diversity** is the range of human differences such as race, ethnicity, gender, gender identity, sexual orientation, age, social class, physical ability or attributes, religious or ethical values, national origin, and political beliefs.
- **Inclusion** is active, intentional, and ongoing engagement in diversity in which different individuals or groups who may otherwise be excluded or marginalized are accepted, engaged, and welcomed.
- **Outreach** is a commitment to create an inviting climate, to form respectful relationships and to share important information about PTA with all community members. Outreach includes efforts that focus on enlisting the participation of all parents, students, and community members in the educational process, and establishing collaborative relationships focused on positive impacts. Use languages represented within the community at PTA meetings and in PTA communications. Work to build representative leadership and voice within the PTA of all community groups. The makeup of the BOD should reflect the makeup of the school community.

PTA fosters the principles of Diversity, Inclusion, and Outreach (DIO) as a powerful voice for all children, a relevant resource for families and communities, and a strong advocate for the education and well-being of every child.

Diversity is the strength of PTA! Those who are intentional in their DIO efforts are most likely to experience great outcomes that benefit all children and their families rather than just isolated patches of success. Create a welcoming environment for all conversations and with a clear understanding that not all members agree on everything. All must agree on the collective goal to serve and to keep all children safe. Have all PTA meetings and events reflect a welcoming and inclusive environment for all.

Establish PTA as a sanctuary for all families to get information, express opinions, concerns, and needs, and feel heard. PTA needs to seek a diverse membership that reflects the diversity of the student body and community it serves through targeted outreach efforts. Consider which groups are less likely to join PTA or participate in meetings and events. To achieve successful outreach, learn about other cultures, traditions, challenges, and restrictions of the groups needing outreach. Identify areas of success and other areas in need of more work. Set goals and action plans to address each of these areas.

Hold inclusive meetings. When scheduling PTA meetings and times, consider possible conflicts, religious holidays,

and work limitations that might prevent people from attending. Possibly alternate days of the week and times of the day. When publicizing the meeting, send out fliers in electronic and paper formats. Ask teachers to include a reminder on the day of the meeting when children write their homework in their agenda planners. Ask room parents to reach out to their rosters. Have handouts with all monthly meeting dates at school and PTA events. Translate materials. Try to have a native speaker proofread the translated flier for accuracy.

Thoughtfully set up the meeting space. Make sure the meeting location, restrooms, and other facilities are accessible to all and easy to find. All attendees need to be able to see, hear, and engage with each other. Have handouts and sign-in sheets easily accessible near the entrance. Consider seating arrangements that make everyone feel equally engaged and significant rather than classroom style. Board Members can spread throughout the space to mingle and meet other members. For the meeting environment, leaders need to be open-minded, presentable, and approachable, making others feel comfortable. Acknowledge new members and attendees as they come in. Name badges make it easier to properly address individuals and to learn their names. Take the time to learn how to pronounce names correctly. Consider having quiet activities for children accompanying their family members. If food or beverages are provided, proper sanitary precautions need to be observed. Consider dietary and religious restrictions as well as food allergies. Provide clear packaging information and ingredients. Finally, collect contact information and follow up regarding topics or issues that need to be addressed later. Make the effort to engage and follow up to create lasting relationships and future leaders!

Recruit leaders from under-represented groups in areas of PTA work that they are passionate about and interested in. Establish fair and equitable practices in all areas of PTA work, including decision making, nominations, elections, appointments, participation, events, topics, and services. National PTA has excellent materials and resources for your use where documents are also available in Spanish.

- [Commitment to DIO](#)
- [Local Leader DIO Guidance](#)
- [DIO Frequently Asked Questions](#)
- [DIO Community Profile Template](#)
- [Enhancing DIO Facilitator's Guide](#)
- [Inclusive Curriculum in K-12 Schools](#)
- [Inclusive Holiday Planning](#)
- [Inclusive Communication During the Holidays](#)
- [How to Welcome Diverse Perspectives Into Your PTA](#)
- [How to Talk About Race and Justice in America](#)

President's Checklist

Get Organized and Begin Planning

- ☐ Review the Bylaws and Standing Rules to stay informed about upcoming mandatory business dates.
- ☐ Request a copy of your current Bylaws from Bylaws@LouisianaPTA.org.
- ☐ Get a copy of [Robert's Rules of Order, Newly Revised](#) or visit RobertsRules.com.
- ☐ Visit LouisianaPTA.org and go through all pages. Create an account at PTA.org for additional resources.
- ☐ Call a meeting of newly elected officers within 30 days of election to appoint Standing Committee chairs.
- ☐ Ensure Board Members meet with their predecessors to exchange relevant information.
- ☐ **Have all officers register with LAPTA at LouisianaPTA.org/register.** Board Members are encouraged to register.
- ☐ Have officers complete the required LAPTA training by visiting LouisianaPTA.org/training.
- ☐ Encourage Board Members to attend LAPTA Training or receive self-paced training at LouisianaPTA.org/training.
- ☐ Schedule a meeting with the principal to plan the yearly calendar and review PTA goals.
- ☐ Collaborate with the Board and the principal to assess needs and establish goals and objectives.
- ☐ Know the PTA's Federal Employer Identification Number (EIN) and Local Unit Registration (LUR#).
- ☐ Arrange for a meeting at the bank to change signers on the PTA's account. Call the bank for requirements.
- ☐ Organize the President's binder and Presidential digital folders.
- ☐ Monitor PTA social media accounts. Have at least two active administrators with full access for each account.

June/July/August

- ☐ Attend the National PTA Convention in June if the budget allows.
- ☐ Attend LAPTA Development Days and Training in August.
- ☐ Request the current Bylaws from LAPTA and give each Board Member a copy.
- ☐ Prepare an agenda for all PTA Meetings.
- ☐ Review the LAPTA Records Retention Policy in the Secretary's Toolkit.
- ☐ Have the Board sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- ☐ Verify the schedule of monthly Board Meetings for the year.

- ☐ Insurance is required for all PTAs. Review submission dates for insurance policy.
- ☐ Update and renew Articles of Incorporation Annual Report with Louisiana Secretary of State at geauxbiz.com.
- ☐ Form the Audit Committee to complete the annual Audit Report which is due to LAPTA at the end of October.
- ☐ Preside over the first General Membership Meeting to adopt the Budget, Annual Report, and Audit Report.
- ☐ Communicate PTA goals for the year to the membership.
- ☐ Intentionally reach out to new families at the school.
- ☐ Consider a Welcome Back to School Celebration for staff and families.
- ☐ Create a Welcome Packet with a membership ask, calendar, PTA Programs, and more.
- ☐ Create a Givebacks.com account for the year to offer online membership purchases and more.
- ☐ Form the Budget Committee to create the new budget.
- ☐ Host a volunteer orientation.

September/October

- ☐ **Complete the Active Affiliation Report at LouisianaPTA.org/affiliation due October 31.**
- ☐ Apply for National PTA Grants at PTA.org/Grants.
- ☐ Share the LAPTA Training Webinar schedule with the Board of Directors. All are welcome to attend.
- ☐ Conduct the fall membership enrollment campaign. Submit member dues at LouisianaPTA.org/membership.
- ☐ Register for the National PTA Reflections program at LouisianaPTA.org/reflections.
- ☐ Conduct the LAPTA Safety Poster Contest and submit winners to LAPTA.

November/December

- ☐ **File Form 990 with the IRS by November 15.**
- ☐ Apply for LAPTA Literature Grant.
- ☐ Form the Bylaws Committee to review the Bylaws and recommend revision or amendments if needed.
- ☐ Check in with officers and committee chairs.

January/February

- ☐ Submit Reflections Arts Program entries to LAPTA.
- ☐ Celebrate National PTA Founders' Day on February 17, 1897.
- ☐ At a General Membership Meeting, form the Nominating Committee as detailed in the Bylaws.

March/April

- ☐ Publish the Nominating Committee's slate of candidates according to the Bylaws.
- ☐ Conduct election of new officers in the month(s) designated in the Bylaws.
- ☐ Recruit volunteers to fill open committee chair positions for next year.
- ☐ Connect current PTA leaders and volunteers with those at feeder schools' PTAs.
- ☐ Contribute to the PTA Annual Report summarizing the PTA's activities and accomplishments over the year.
- ☐ Consider a membership survey to review past activities and solicit suggestions for new activities.
- ☐ Attend National PTA Legislative Conference with LAPTA.
- ☐ Attend Louisiana PTA's annual virtual General Membership Meeting.
- ☐ Schedule with LAPTA delivery of student awards from LAPTA's contests.

May/June

- ☐ Present the Annual Report (summary of the year's activities) at the last General Membership Meeting.
- ☐ Coordinate installation of new officers. Thank this year's PTA Board and school volunteers.
- ☐ Submit the elected officer information to LAPTA at LouisianaPTA.org/register.
- ☐ Have a transition meeting between the old and new Boards.
- ☐ Pass all information along to the newly elected President, including all passwords to all accounts.
- ☐ Transfer all social media accounts to the new President, Vice-President, and Treasurer.
- ☐ Coordinate with the newly elected President to change signers on the bank account.
- ☐ Complete the Inventory Accountability Form.
- ☐ Attend National PTA Convention.
- ☐ Pat yourself on the back for a job well done and for your diligent work behind the scenes. Thank you!

2025-26 LAPTA Calendar (Subject to Change)

Visit LouisianaPTA.org/calendar for updates.

July 2025

- All Schedule one-on-one training with LAPTA to jump start the year (Leader.Develop@LouisianaPTA.org)
- 1 Elected officer terms begin
- 15 Register all officers with LAPTA at LouisianaPTA.org/register

August 2025

- 1 Encourage Board Members to register with LAPTA at LouisianaPTA.org/register
- 15 Start working on Active Affiliation Report. See LouisianaPTA.org/affiliation.
- 16 LAPTA Leadership Training in Mandeville
- 23 LAPTA Leadership Training in Shreveport
- 31 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

September 2025

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

October 2025

- 6–12 National Fire Prevention Week
- 15 Deadline for National PTA School of Excellence submissions
- 23–31 National Red Ribbon Week; Conduct the LAPTA Safety Poster Contest (LouisianaPTA.org/contest.)
- 31 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.
- 31 **Deadline for Active Affiliation Report. See LouisianaPTA.org/affiliation.**

November 2025

- All Visit PTA.org/home/programs/family-reading and plan a Family Reading Experience event.
- 1 Deadline to submit Safety Poster Entries to LAPTA at LouisianaPTA.org/contest.
- 10 LAPTA Red Ribbon Week Safety Poster Contest winners announced.
- 11 Veterans Day
- 16 Reflections Theme Contest Submission deadline. See LouisianaPTA.org/theme.
- 23 LAPTA Literacy Grant deadline. See LouisianaPTA.org/grants.
- 30 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

December 2025

- 1 LAPTA Literacy Grant and LAPTA Reflections Theme Search winners announced.
- 31 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

January 2026

- 18 Reflections Submission Deadline to LAPTA
- 31 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

February 2026

- 9 Louisiana PTA's 103rd Birthday (1923)
- 17 National PTA Founders' Day (1897) and Mardi Gras Day
- 28 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

March 2026

- 2-4 National PTA Legislative Convention (LegCon)
- 2-6 Read Across America Day (NEA.org)
- 2 LAPTA Reflections Program winners announced.
- 31 Deadline for LAPTA Awards, Creative Teacher Grant, Day of Service Grant, and Healthy Minds Grant
- 31 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

April 2026

- All LAPTA delivery of student awards to PTAs; Transition time and planning for the year ahead
- 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, Healthy Minds Grant
- 30 Submit new membership dues at LouisianaPTA.org/membership.

May 2026

- All LAPTA delivery of student awards to PTAs; Transition time and planning for the year ahead
- 4-8 Teacher Appreciation Week
- 31 Register new 2026-27 officers at LouisianaPTA.org/register.
- 31 Submit new membership dues through Givebacks at LouisianaPTA.org/membership.

June 2025

- 18-21 Join LAPTA at the National PTA Convention in Pittsburg, PA.
- 30 2025-26 officer terms end. Register new officers at LouisianaPTA.org/register.

Year-End Checklist & Transition Guidance

PTA leaders have a series of important tasks to accomplish before the school year concludes to ensure a seamless handover and to provide their successors with a solid foundation for the upcoming year. When preparing to meet with your successor, think about things done during the term in office that the successor should know and practice; things that *should* have been done that the successor should know and practice; things that the successor should address during the first 30 days in office; things that would instill an effective Board and help to conduct productive Board Meetings; and any final thoughts for the new leadership team's success.

- **Initiate a Meeting with the Successor:** Meet with the successor as soon as possible. Give a timeline of the year's events, job details, a summary of activities and initiatives, and a review of the previous budget.
- **Conduct Elections:** Organize and hold elections promptly in the month designated in the Bylaws. Have the newly elected officers register with LAPTA at LouisianaPTA.org/register.
- **Submit Outstanding Membership Dues:** Pay outstanding dues at LouisianaPTA.org/membership.
- **Update Bank Account Signers:** Go to the bank to update authorized signatories with new officers.
- **Verify Treasurer's Year-End Checklist:** Review the Treasurer's Year-End Checklist to ensure that all financial matters are in order. Locate any missing receipts or requirements.
- **Close Financial Records by June 30:** As June 30 approaches, take the necessary steps to close out the financial records. Submit check requests before the books are closed. Inquire about any outstanding checks.

The Outgoing Board should meet to debrief and evaluate the work for the year and offer suggestions for improvements; fully complete their term and tasks; meet with and support their successors; have the new Board Members register at LouisianaPTA.org/register; turn over all resources, materials, and passwords immediately including social media accounts; and, step back and let go.

The Incoming Board should always:

- Create a profile at PTA.org.
- Register with LAPTA at LouisianaPTA.org/register.
- Receive LAPTA Training at LouisianaPTA.org/training.
- Familiarize themselves with PTA.org and LouisianaPTA.org.
- Order any necessary materials and supplies.
- Fill any vacancies and appoint chairpersons, if necessary.
- Work on the goals for the year and develop a calendar of events.
- Meet with school administration.
- Ensure that year-end financial reports are complete and begin planning for the new budget.

Sample Agenda

Madison High PTA Board of Directors Meeting

January 19, 2030

AGENDA

Meeting called by Tera

Executive Board Members:

President: Tera
Treasurer: Carolyn

Vice-Presidents: Shelley & Beth
Secretary: Stephanie

Committee Board Members:

Membership: Katie
Volunteer: Sandra
Fundraising: Amy, Melanie, Christen
Hospitality: Jenn, Amy, Elizabeth

Room Mom: Kristy
Reflections Program: Amy
Beautification: Bessy
Uniforms: Caroline

Grants & Awards: Christie
Newsletter: Angie, Doris
Teacher Rep: Erin, Sarah

Opening: The PTA Mission is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.Tera

Secretary Report – MinutesStephanie

Treasurer Report – Budget Review; Bank Balance: \$Carolyn

President Report – Library Movie Night; Slime date; Bring-a-Buddy Breakfast.....Tera

Principal Report.....Mrs. Welch

Committee Reports

- ☐ Membership CommitteeKatie
- ☐ Volunteer CommitteeSandra
- ☐ Fundraising.....Tera
- ☐ Hospitality.....Jenn
- ☐ Room MomsKristie
- ☐ Reflections.....Shelley
- ☐ Art Parents.....Amy
- ☐ BeautificationBessy
- ☐ Library Committee.....Amy
- ☐ NewsletterAngie
- ☐ UniformsCaroline
- ☐ Grants & AwardsChristie
- ☐ Teacher RepresentativeSarah

Old Business.....Tera

New Business

- ☐ Upcoming Flyers/Events.....Beth

Important Dates

Jan 23-26 Bring-a-Buddy Breakfasts Feb 21 Board Meeting at 9:30am

Jan 31 Dominos night Mar 21 Board Meeting at 1:30pm

Adjournment.....Tera

Sample Meeting Script See [National PTA script](#) for further guidance.

Call To Order (Required)

The President, as the chair, calls the meeting to order. The chair declares if a quorum is present, and the Secretary notes the fact in the minutes. If the Secretary is not present, the chair appoints a member temporarily.

PRESIDENT: "The meeting of __ PTA is called to order at _____ (time). A quorum (is/is not) present." *If Secretary is absent*, "Due to the absence of _____, the chair would like to appoint _____ as Secretary for this meeting."

Opening (Optional) and Introduction of Special Guests (Optional)

Suggested openings are the PTA Mission, Pledge of Allegiance, or an inspirational message.

PRESIDENT: "Please welcome _____ who will (read the PTA mission)."

PRESIDENT: "At this time the chair would like to welcome _____ who is _____."

Explanation of Meeting Technology (If Virtual Meeting)

PRESIDENT: "Let's review the meeting rules (raising your hand, unmute, chat, time constraints, etc.) If we need to conduct a ballot vote, it will be (by email, anonymous poll on the meeting platform, etc.)."

Explanation for Making a Motion (Optional)

"For motions, once a motion is made, the chair will call on those who wish to speak. Pro and con speakers are given alternating opportunities to speak, if possible. A member may speak once, and then after every other member has had the chance to speak, may speak a second time. Address the chair while speaking and not to other members. Should the chair wish to debate, the chair will ask the Vice-President to preside. In a formal meeting, the chair may only vote when the vote would change the outcome (to make or break a tie) or when the voting is by ballot."

Secretary Report (Required)

The chair recognizes the Secretary for reading of the minutes. The Secretary either reads the minutes or announces how the draft minutes were distributed, or the chair announces that a Minutes Committee previously approved the minutes. The chair can use majority consent to accept the minutes. Minutes are presented at every meeting unless previously approved by a committee. Suggestions:

PRESIDENT: "_____, Secretary, will now read the minutes from the last meeting (or distributed the minutes prior to the meeting by email)." Secretary reads the minutes or states how the minutes were distributed for review before the meeting and then asks for corrections. [PAUSE] "Hearing none, the minutes are approved," or "The minutes are approved with corrections."

PRESIDENT: "The minutes of the [date] meeting were approved by the Minutes Committee on [date]. The Secretary has copies of the minutes. Corrections to the minutes should be referred to the Secretary."

PRESIDENT: "If there is no objection, the chair will appoint a committee to approve the minutes by unanimous consent. The chair appoints _____, _____, and _____ who will meet and approve today's minutes. Is there any objection? Hearing none, motion passed with unanimous consent" *The chair may appoint a committee to approve the current minutes if the next meeting is many months away.*

Treasurer Report (Required)

The chair recognizes the Treasurer for the financial report which is required at all meetings. The Treasurer reads the report. Copies of the report may be distributed to the members or shown on a screen. The financial report includes at least the beginning balance, total income, total expenditures, and the ending balance, plus the reconciliation report and current Actual versus Budget Report. All information is recorded in the minutes. No motion is needed.

PRESIDENT: "_____, Treasurer, will now present the financial report." TREASURER: "The beginning balance as of [date] is \$_____, total income is \$_____, total expenses are \$_____, with an ending balance of \$_____. Here is the reconciliation report and the budget compared to the current actual amounts."

PRESIDENT: "Thank you, are there any questions? Hearing none, the financial report will be filed in the record."

Approval of Proposed Budget (Required once per year)

The proposed budget is presented at a General Membership Meeting for approval.

PRESIDENT: "_____, Treasurer and chair of the Budget Committee, will now present the proposed budget."

TREASURER: Read each line item. Ask for questions. After review, say "I move that the proposed budget be adopted as presented." PRESIDENT: "The Budget Committee has moved to adopt the proposed budget as presented. This comes from the committee, so no second is needed. Is there any discussion? Hearing none, all those in favor, say 'aye.' Any opposed, say 'no.' The motion passed/failed." The motion needs an affirmative majority vote.

Budget Amendments

If the budget needs an amendment later in the year, read the amendment including the current amount, the amount of the increase or decrease, and then the new amount. PRESIDENT: “_____ will now present the budget amendments.” TREASURER: Read the details and then say “I move that the budget amendments be approved as presented.” PRESIDENT: “_____ moved that the budget amendment be approved as presented. Is there a second? Is there any discussion? Hearing none, all those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.” The motion needs an affirmative two-thirds vote.

Audit Report

The Audit Report is presented at the first meeting of the year and at the first meeting after any audit.

PRESIDENT: “_____, the Audit Committee Chair, will present the Audit Report.”

AUDIT COMMITTEE CHAIR: The chair reads the Audit Report. “I move to adopt the Audit Report as presented.”

PRESIDENT: “_____ has made a motion to adopt the Audit Report. This comes from a committee so no second is needed. Is there any discussion? (pause) All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.” The motion needs an affirmative majority vote.

President and VP Reports

The President calls for reports from the officers. This may be informational or require action. If a report requires action, they are presented as a motion. The member presenting the report makes the motion. PRESIDENT: “_____ will give a report on _____.” OFFICER: Reads the report and makes its recommendation. “I move that _____.”

PRESIDENT: Repeat the motion and ask for a second (if not committee work). The person making the motion may explain further. “Is there further discussion? Are you ready for a vote? _____ has moved that _____. All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.”

BOD and Committee Reports at General Membership Meetings (Optional)

A summary report of the Board’s work is given at a General Membership Meeting and contains any motions made in the Board Meetings. The Secretary reads a summary report (not the minutes) for the members. The Secretary moves the adoption of each recommendation individually. PRESIDENT: “_____, Secretary, will give the Board’s Report.”

SECRETARY: “The Board met on _____ with a quorum present.” For each motion say, “On behalf of the Board of Directors, I move that _____.” PRESIDENT: “The Board has moved that _____. This comes from the committee so there is no second needed. (Person making the motion may explain.) “Is there any further discussion? _____ has moved that _____. All those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed/failed.”

Standing Committee, Special Committee, and Special Order Reports

The President calls for the reports of the committees, if needed. A report from a committee may be informational or require action, as determined by a majority vote of the committee. Those reports requiring action are presented as a motion to the membership (no second required), and the members vote to approve either as presented, amended, or rejected. The committee chair who presents the report moves the adoption of the motion. Address motions made by a “special order” (by an affirmative two-thirds vote at an earlier time) and motions required by the Bylaws to be taken up at a specific meeting. If no recommendation is made, no motion is needed.

Appointment of Nominating Committee Members

PRESIDENT: “The Secretary will read the Bylaws regarding the Nominating Committee.”

SECRETARY: The Secretary reads directly from the Bylaws the Article on Nominations and Elections, and the sections regarding the Nominating Committee. PRESIDENT: “The floor is now open for anyone wanting to serve on the Nominating Committee.” The chair should call on anyone who has raised their hands until all nominations have been made. Individuals may nominate themselves or someone else. “Could someone motion that the Nominating Committee will be [3 people] with [2 people] being alternates (optional) to the committee.” The Nominating Committee is appointed by an affirmative majority vote. See the Bylaws for timing and notices.

Adjournment (Required)

After covering all items listed on the agenda, the chair asks if there is anything else to discuss, and then proclaims, “If there is nothing else to discuss, this meeting is adjourned at [time].” If the chair wants to end the meeting before all items are discussed on the agenda, a motion needs to be made to adjourn the meeting with an affirmative majority vote.

Sample Passwords & Accounts Summary

Keep a current list of passwords, at least two officers should have a copy, and share it with the next Board.

ABC PTSA Passwords & Accounts 2023-2024

PTA LUR #: 9999

IRS EIN# 99-9999999

Monthly/Annual Renewal:

GeauxBiz.com: login email & password

LA Charter #: 999999 ; NAKS #: 999999

IRS.gov for Form 990N: IRS login username & password; email & phone associated with account; other security question answers; or other filing information such as Efile.form990.org: name, login ID #, password

AIM Insurance: aim-companies.com; Insure# LA0009999; Username & password; 800-876-4044; expiration date

Moneyminder.com: email & password

Givebacks.com: email & password

SquareUp.com: email & password

MicroSoft Teams: email & password

Zoom: email & password

Mailchimp.com: email & password

Other Accounting Software: login & password

Facebook: Note admin names plus their phone numbers; passwords are their current accounts' passwords; have at least two people listed as administrators with full access

Bank: screenname, email & password; routing # 999999999, acct # 999999999

Debit Cards: person's name, account number, expiration date, CVV Code; this is not allowed in Caddo Parish.

Email Accounts: email & password; phone associated with account; backup email

****This is to be shared with President, Treasurer, and Secretary.****

Communications and Social Media Policy

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.

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 have 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 of 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 is 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 had conduct that damaged 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:

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 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 the authorized budgeted items;
4. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA;
5. Publicly present a united front on decisions made as a Board;
6. Maintain confidentiality as a Board Member;
7. Follow the LAPTA and school district guidelines for fundraising; and
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. Board Members must declare conflicts of interest to the PTA Board, stating the nature of the conflict and all pertinent information;
 - c. 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;
 - d. 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.

We, the undersigned Board Members of _____, have read and agree to abide by this policy. We understand that failure to adhere to the above guidelines may result in the termination of the undersigned as Board Members and will require the immediate return of all PTA property, documents, and materials belonging to this PTA.

[illegible]