

PTA Leader Toolkit

2023 – 24

Louisiana PTA



LouisianaPTA.org

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Louisiana Parent Teacher Association

Please report any errors, typos,
or missing information to
Affiliation@LouisianaPTA.org.

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LOUISIANA PTA OFFICE

All Local PTA Units in Louisiana are affiliates of Louisiana PTA (LAPTA) and National PTA. The Louisiana PTA Board of Directors serves as a resource and support for local units. Thank you for joining PTA as we work to make a difference in our communities. PTA focuses on making every child's potential a reality by strengthening education and taking a comprehensive approach to community success.

Louisiana PTA
1131 N. Causeway Blvd. Suite 306
Mandeville, LA 70471
office@LouisianaPTA.org

LOUISIANA PTA BOARD OF DIRECTORS

The LAPTA Board of Directors is made up of volunteers from Local PTA Units across the state. Contact the Board members directly with any questions or concerns.

There are several volunteer positions currently open. If you are interested in serving at the state level, contact LAPTA President. To apply for a position, visit form.jotform.com/221844836900054. Most Board members also serve at the local level. Join us!

Executive Committee	Kayla Pagel	President	president@louisianapta.org
	OPEN	VP, Advocacy	advocacy@louisianapta.org
	Beth Maillho	VP, Affiliation	affiliation@louisianapta.org
	OPEN	VP, Arts Education	arts.education@louisianapta.org
	OPEN	VP, Diversity, Equity & Inclusion	dei@louisianapta.org
	Jennifer Hale	VP, Leadership Development	leader.develop@louisianapta.org
	Peggy Mauer	VP, Membership	membershipchair@louisianapta.org
	Ashley Snell	Treasurer	treasurer@louisianapta.org
	Latonyaw Thompson-Richmond	Secretary	secretary@louisianapta.org
Committee Chairs	OPEN	Historian	historian@louisianapta.org
	Tera Blackledge	Chair, Events Committee	events@louisianapta.org
	OPEN	Chair, Elections Committee	
	Jessica Latin	Chair, Healthy Minds Committee	healthyminds@louisianapta.org
	OPEN	Chair, LA Legislative Comm.	
	Peggy Mauer	Chair, Membership Committee	membershipchair@louisianapta.org
	OPEN	Chair, Nominations Committee	
	OPEN	Chair, Reflections Committee	
	OPEN	Chair, Poster / PSA Committee	
	Philip Davis	Chair, Statewide Unit Committee	president@lagniappeptsa.org
	Doris Glass-Heckert	Chair, Special Populations Comm.	special.populations@louisianapta.org
	OPEN	Chair, Teens & Young Adult Comm.	
	OPEN	Committee Member At Large	
	Giselle Allen	Federal Legislative Chair	FLC@louisianapta.org
	LAPTA Staff		
Giselle Allen	Administrative Director	office@louisianapta.org	

WHAT DOES LAPTA DO?

- Advocates for children at the local, state, and federal levels
- Makes every child's potential a reality by engaging and empowering families and communities to advocate for all children.
- Assists local units in building community through programs that promote student achievement, creativity, and inclusiveness.
- Ensures members of Louisiana Local PTA Units have the same purposes and principles as National PTA.
- Ensures Local PTA Units operate according to National PTA's vision, mission, values, and policies and their legislative and advocacy priorities and adopted positions and resolutions.
- Aids the local units in maintaining compliance with National PTA, LAPTA, and IRS rules and requirements.
- Forwards the National PTA dues portion from Local PTA Units' dues submitted to LAPTA.
- Represents all Louisiana PTA members by participating in and voting at the National PTA Convention and National Legislative Convention.
- Hosts LAPTA Leadership Training in August and privately throughout the year for individual units as needed.
- Offers LAPTA grants to help fund Local PTA Units in providing engaging, educational, and fun opportunities

for children, families, and communities.

- Assists PTA Leaders if challenges occur in accomplishing the primary mission of their unit.
- Helps create new PTA units or reinstate unaffiliated units.
- Implements National PTA Reflections Program and awards state winners.
- Holds the General Membership State Meeting and Children's Awards Program or Recognition Ceremony.

LAPTA'S MISSION PARTNERS

Mission Partners are nonprofits or other groups whose focus is to improve the lives of children and whose mission aligns with the PTA mission. These like-minded associations and coalitions might include a teacher or librarian group, foster care, a mental health group, and so many more. To become a Mission Partner or learn more about it, visit LouisianaPTA.org/missionpartners. Current Mission Partners are:

ON OUR SLEEVES®

The Movement for Children's Mental Health

The **On Our Sleeves Alliance** works to amplify the cause of children's mental health through the voices and actions of leading corporations, youth-serving organizations and health care organizations across the country. The Alliance works to empower the mental health and wellness of every child in the US, through fundraising and distribution of expert-created resources necessary for breaking stigmas, educating families, and advocates and teaching mental wellness skills. See OnOurSleeves.org for more.



Seymore D'Fair
EDUCATION FOUNDATION
PREVENTION COALITION

Seymore's Foundation operates under the Community Drug-Free Support Program. The coalition between many national programs provides a unified community force that promotes healthy lifestyle choices and focuses on prevention and reduction of substance use and other negative risk behaviors affecting children. For details, see SeymoresFoundation.org. The 2023-24 theme for Kiki's Red Ribbon School Celebration is "I'm Better Drug-Free." The 2023 LAPTA Drug-Free Poster Contest has students make a drawing supporting the theme. For contest information and deadlines, see LouisianaPTA.org/contests.

Louisiana Partnership for children & families

Louisiana Partnership for Children and Families: As a statewide advocacy organization dedicated to giving Louisiana children a voice for a better life and to influencing public policy and educating parents, they ensure the best services are provided for the children. Improving a child's education, health, and welfare actually improves the quality of life for all, now and in the future. See louisianapartnership.wildapricot.org for more.



Voter Voice is Louisiana PTA's new tool to allow our members to speak for every child with one voice more easily and efficiently. This platform provides important information about legislative issues affecting families, schools, and communities and helps members stay informed on the latest updates from Louisiana elected officials. For more information, see LouisianaPTA.org/Advocacy.

ABOUT NATIONAL PTA

The Parent Teacher Association (PTA) is the oldest and largest child advocacy association in America. PTA is comprised of millions of parents, teachers, grandparents, caregivers, foster parents, and other caring adults who share a commitment to improving the education, health, and safety of all children who all speak with one voice for every child.

PTA provides parents with the forum and tools to collectively influence the decisions that affect children not only at their schools, but also in their districts, state, and nation. PTA offers families important benefits, including: Dozens of national programs, experts, and turnkey resources; Regular updates and advice in the form of e-newsletters, PTA.org, Our Children magazine, and a robust Local PTA Leader Kit of resources; Leadership development through webinars and e-learning courses; Millions of dollars in grants to help build PTA capacity and skills; Prestigious national awards; Cost savings from national retailers and other PTA partners; Invitations to PTA Conventions and Legislative Conference; and Support services to help establish and manage the PTA.

The Local PTA Unit is a member of Louisiana PTA (LAPTA) and National PTA organizations and shares the mission, purposes, values, and standards of National PTA. Visit LouisianaPTA.org and PTA.org for more.

Why are we here? The Mission of PTA is to make every child's potential a reality by engaging and empowering families and communities to advocate for all children.

Purposes:

- To promote the welfare of children in home, school, places of worship, and throughout the community;
- To raise the standards of home life;
- To advocate for laws that further the education, physical and mental health, welfare, and safety of children;
- To promote the collaboration and engagement of families and educators in the education of children;
- To engage the public in united efforts to secure the physical, mental, emotional, spiritual, and social well-being of all children;
- To advocate for fiscal responsibility regarding public tax dollars in public education funding.

Values:

- **Collaboration:** We work in partnership with a wide array of individuals and organizations to broaden and enhance our ability to serve and advocate for all children and families.
- **Commitment:** We dedicate ourselves to children's educational success, health, and well-being through strong family and community engagement while remaining accountable to the PTA's founding principles.
- **Diversity:** We acknowledge the potential of everyone without regard to age, culture, economic status, educational background, ethnicity, gender, geographic location, legal status, marital status, mental ability, national origin, organizational position, parental status, physical ability, political philosophy, race, religion, sexual orientation, and work experience.
- **Respect:** We value the individual contributions of members, employees, volunteers, and partners as we work collaboratively to achieve our PTA's goals.
- **Accountability:** All members, employees, volunteers, and partners share responsibility to align their efforts toward the achievement of our PTA's strategic initiatives.

National PTA Standards for Family-School Partnerships

The PTA's updated National Standards for Family-School Partnerships set the bar for how schools and parent organizations work together to support student success. The Standards have contributed to greater awareness and capacity for improving family-school partnerships across the country and internationally for over 20 years. Get to know the National Standards for Family-School Partnerships by exploring the definitions, goals, and indicators for each of the six tenets to help fulfill the mission of PTA. See <https://www.pta.org/home/run-your-pta/family-school-partnerships>. The six standards are:

- **Standard 1: Welcoming All Families Into the School Community** – Families actively participate in the life of the school, and feel welcomed, valued, and connected to each other, to school staff, and to what students are learning and doing in class.
- **Standard 2: Communicating Effectively** – Families and school staff engage in regular, two-way, meaningful communication about student learning.
- **Standard 3: Supporting Student Success** – Families and school staff continuously collaborate to support students’ learning and healthy development both at home and at school and have regular opportunities to strengthen their knowledge and skills to do so effectively.
- **Standard 4: Speaking Up for Every Child** – Families are empowered to be advocates for their own and other children, and to ensure that students are treated fairly and have access to learning opportunities that will support their success.
- **Standard 5: Sharing Power** – Families and school staff are equal partners in decisions that affect children and families and together inform, influence, and create policies, practices, and programs.
- **Standard 6: Collaborating With Community** – Families and school staff collaborate with community members to connect students, families, and staff to expanded learning opportunities, community services, and civic participation.

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Louisiana Parent Teacher Association

LAPTA CALENDAR & IMPORTANT DATES

July 2023

- July 1 Board position terms begin
- July 15 Submit officer data at LouisianaPTA.org/register

August 2023

- August 1 Submit officer data at LouisianaPTA.org/register
- August 15 Reflections Program opens
- August 12 Start working on Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.
- August 19 LAPTA Leadership Training South for southern Local PTA Units
- August 25 Submit new membership dues at LouisianaPTA.org/membership
- August 26 LAPTA Leadership Training North
- August 30 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm

September 2023

- September 1 Review PTA.org and *LAPTA ToolKit: Grants* for available grants and their deadlines
- September 5 Healthy Minds Zoom Training at 12:00 noon and 7:00 pm
- September 6 Reflections Q&A Zoom Meeting at 12:00 noon and 7:00 pm
- September 11 Affiliation Requirements Zoom Training at 12:00 noon and 7:00 pm
- September 12 Programs & Grants Zoom Training at 12:00 noon and 7:00 pm
- September 13 Secretary Zoom Training at 12:00 noon and 7:00 pm
- September 14 Membership Zoom Training at 11:00 am and 6:00 pm
- September 14 Presidents & VPs Zoom Training at 12:00 noon and 7:00 pm
- September 16 Treasurer Zoom Training at 12:00 noon
- September 19 Diversity & Inclusion Zoom Training at 12:00 noon and 7:00 pm
- September 21 Developing Your Leaders Zoom Training at 12:00 noon and 7:00 pm
- September 25 Submit new membership dues at LouisianaPTA.org/membership

October 2023

- October 1 Deadline for National PTA.org School of Excellence submissions
- October 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- October 14 Statewide Election Day – Advocate for all children by voting
- October 20 Red Ribbon Poster Contest Deadline to Submit to LAPTA
- October 23–31 National Red Ribbon Week
- October 25 Submit new membership dues at LouisianaPTA.org/membership
- October 27 Deadline for Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.**
- October 30 LAPTA Red Ribbon Poster Contest Winners Announced

November 2023

- November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
- November 15 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- November 17 LAPTA Literacy Grant Deadline (<https://form.jotform.com/221748002230038>)
- November 17 Reflections Theme Contest Submission Deadline <https://form.jotform.com/221745830340147>
- November 18 Statewide Election Day – Advocate for all children by voting
- November 25 Submit new membership dues at LouisianaPTA.org/membership
- November 30 LAPTA Reflections Theme Search Winners announced

December 2023

- December 1 LAPTA Literacy Grant Winners Announced
- December 5 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- December 20 Submit new membership dues at LouisianaPTA.org/membership

January 2024

- January 22 Reflections Submission Deadline to LAPTA
- January 25 Submit new membership dues at LouisianaPTA.org/membership

February 2024

- February 9 Louisiana PTA's 100th Birthday
- February 13 Mardi Gras Day
- February 17 National PTA Founders' Day
- February 28 Submit new membership dues at LouisianaPTA.org/membership

March 2024

- March 1 LAPTA Reflections Program LAPTA winners announced
- March 1 LAPTA Day of Service Grant application deadline at LouisianaPTA.org/grants
- March 1 Newsletter Award application deadline at LouisianaPTA.org/awards
- March 1 Advocacy Award application deadline at LouisianaPTA.org/awards
- March 2 Read Across America Day (nea.org)
- March 22 Deadline for Volunteer of the Year Award and Mentor-a-PTA Award
- March 25 Submit new membership dues at LouisianaPTA.org/membership
- March 27 LAPTA Healthy Minds Grant Application Deadline at LouisianaPTA.org/grants
- March TBA National PTA Legislative Convention (LegCon)

April 2024

- April Transition Time and Planning for the Year Ahead
- April 1 Deadline for Creative Teacher Grants at LouisianaPTA.org/grants
- April 1 Deadline for membership reports for LAPTA Annual Membership Awards
- April 20 LAPTA Recognition Ceremony and State Meeting; Winners announced for Day of Service Grants, Creative Teacher Grants, Volunteer of the Year, and Outstanding Newsletter Awards
- April 25 Submit new membership dues at LouisianaPTA.org/membership
- April 28 Submit officer data at LouisianaPTA.org/register

May 2024

- May Transition Time and Planning for the Year Ahead
- May 1 LAPTA Healthy Minds Grant Winners Announced
- May 6-10 Teacher Appreciation Week
- May 25 Submit new officer data at LouisianaPTA.org/register
- May 25 Submit new membership dues at LouisianaPTA.org/membership

June 2024

- June 1 Search and publicize Summer Learning Programs at PTA.org and your local community
- June 25 Submit new officer data at LouisianaPTA.org/register
- June 30 Submit new membership dues at LouisianaPTA.org/membership
- June TBD National PTA Virtual Convention (tentative dates)

PTA Leader Toolkit

2023 – 24

Section 2: President

LouisianaPTA.org/president



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Louisiana Parent Teacher Association

LEADERSHIP TRAITS

Successful leaders are effective leaders. Their skills and abilities allow them to step into a variety of roles, and they see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to continually improve. **PTA Leaders are always looking for their replacement and for new people to join the PTA Board of Directors. They intentionally reach out and ask others to join PTA.**

Competent and effective leaders have:

- **Self-Awareness** – Has the ability to assess their own strengths and weaknesses.
- **Vision** – Demonstrates a clear understanding of the future and how to get there.
- **Relationship Building** – Develops trust and mutual respect, and values diversity.
- **Critical Thinking** – Obtains all the relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions.
- **Time & Resource Management** – Effectively prioritizes and manages resources to accomplish goals.
- **Motivation** – Demonstrates and promotes interest and enthusiasm.
- **Empathy** – Recognizes verbal and nonverbal feelings, needs, and concerns of others.
- **Creativity** – Sees and thinks of innovative ideas, alternatives, and ways to do things.
- **Communication** – Listens actively and conveys information clearly, concisely, and accurately in both writing and speech.
- **Collaboration** – Works with a team to achieve a common purpose; puts service before self.
- **Delegation** – Shares responsibilities including guidance and follow up, fostering leadership in others.
- **Continuous Learning** – Pursues development of skills and knowledge.
- **Integrity** – Does the right thing when no one is watching.
- **Initiative** – Steps up unprompted, going above and beyond with excellence.

IMPORTANT DOCUMENTS AND TERMS

Local PTA Units fall under Louisiana PTA's tax umbrella and are classified as **tax-exempt 501(c)(3) nonprofits** under the US Internal Revenue Code. LAPTA has procedures to help protect Local PTA Units from violating the restrictions that apply to the 501(c)(3) classification. *See LAPTA Toolkit: Treasurer* for details.

A charter is issued when a group completes the requirements for organization as a PTA including approval of the Bylaws. A charter is evidence that a PTA is a unit of Louisiana PTA.

Bylaws provide the rules for the association (or PTA). They describe the rights and duties of the members, and are the backbone of the PTA. All Local PTA Units are required to have their Bylaws approved by LAPTA which is responsible for ensuring that unit Bylaws follow LAPTA and National PTA Bylaws. Annual review of the Bylaws ensures that they reflect the way the PTA functions. LAPTA rules require units to review their Bylaws, update them if needed, and submit them to the LAPTA for approval at least every three years. It is important to keep the Bylaws current and to refer to them often.

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. A unit's EIN identifies it as a non-profit organization. The President may contact LAPTA if they do not know their EIN. If a PTA needs to verify its non-profit status and EIN, such as when applying for a grant or opening a bank account, contact LAPTA President to request an EIN letter.

Local Unit Registration Number (LUR #) was issued to each Local PTA Unit when the charter began. It is also known as a National PTA ID#. This number never changes. It is found on any material received from National PTA. This number is important and should be kept with the permanent records.

ESSENTIAL KNOWLEDGE

The President serves as the presiding officer of the Local PTA Unit and presides over the Board of Directors and General Membership meetings. It is the President's responsibility to be well prepared. The President distributes all materials to the appropriate officer or committee chair and is the link to the principal. The President directs the affairs of the association in cooperation with the other members of the Board. The term begins and ends at the opening and closing of the fiscal year, as specified in the Bylaws, usually July 1 – June 30. Participation and cooperation from officers, committee chairs, and members will determine the success of the administration.

The Local PTA Unit and its members are a part of Louisiana PTA (LAPTA) and National PTA. Members are the backbone of the association. Membership does not consist of mere numbers. Strive to build an informed team of individuals working on behalf of all children. A membership involved in the school and community builds the foundation for its children and generations to come. A membership that reaches beyond the parents and teachers and looks out into the community will open its doors to many opportunities. By extending membership, its voice becomes stronger so that policymakers on all levels will hear a strong, unified voice for all children.

Planning and promoting PTA programs and events is a primary responsibility in PTA. It is the avenue to achieving our goals as child advocates and supporters of public education. PTA programs serve as a tool to educate the membership and to draw the members into a community of support for the children and families served by PTA. Programs today are creative and meaningful. PTA uniquely offers a way for families of differing religions, cultures, economic groups, and political interests to unite in support of one common issue: the health and welfare of children. No other organization exists to serve this function so completely. PTA programs keep the membership informed of issues, educate parents, and provide a sense of community that unites neighbors far beyond involvement in their children's school. Family engagement results in higher student achievement and closer family-school ties. *See Pick Your PTA Programs later in this section.*

LAPTA is a member-based association that advocates for children. PTA supports legislation that will raise the level of 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, in the name of PTA, 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 such issues, the following policies should be observed.

- **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.
- **Nonsectarian:** PTA welcomes into membership people representing 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 National PTA.
- **Noncommercial:** The name "PTA" (a registered service mark) or the names of its officers shall not be used in conjunction with the commercial activities of other organizations including, but not limited to, 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 association, at any level, should consider whether such acceptance might be construed as an endorsement of the provider.

School board elections and leadership on local Boards of Education is of vital interest to all PTA members. To help the people of the community ascertain the qualifications of the candidates for the school board, a Local PTA Unit may participate in, initiate, or sponsor a public meeting for this purpose. Invite all community groups to send representatives to the meeting to thoroughly discuss the qualifications of each candidate. All candidates must be asked to speak to avoid even the appearance of partisanship or discrimination. See *LAPTA Toolkit: Advocacy* for more details.

LAPTA CALENDAR & IMPORTANT DATES

July 2023

- July 1 Board position terms begin
- July 15 Submit officer data at LouisianaPTA.org/register

August 2023

- August 1 Submit officer data at LouisianaPTA.org/register
- August 15 Reflections Program opens
- August 12 Start working on Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.
- August 19 LAPTA Leadership Training South for southern Local PTA Units
- August 25 Submit new membership dues at LouisianaPTA.org/membership
- August 26 LAPTA Leadership Training North
- August 30 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm

September 2023

- September 1 Review PTA.org and *LAPTA ToolKit: Grants* for available grants and their deadlines
- September 5 Healthy Minds Zoom Training at 12:00 noon and 7:00 pm
- September 6 Reflections Q&A Zoom Meeting at 12:00 noon and 7:00 pm
- September 11 Affiliation Requirements Zoom Training at 12:00 noon and 7:00 pm
- September 12 Programs & Grants Zoom Training at 12:00 noon and 7:00 pm
- September 13 Secretary Zoom Training at 12:00 noon and 7:00 pm
- September 14 Membership Zoom Training at 11:00 am and 6:00 pm
- September 14 Presidents & VPs Zoom Training at 12:00 noon and 7:00 pm
- September 16 Treasurer Zoom Training at 12:00 noon
- September 19 Diversity & Inclusion Zoom Training at 12:00 noon and 7:00 pm
- September 21 Developing Your Leaders Zoom Training at 12:00 noon and 7:00 pm
- September 25 Submit new membership dues at LouisianaPTA.org/membership

October 2023

- October 1 Deadline for National PTA.org School of Excellence submissions
- October 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- October 14 Statewide Election Day – Advocate for all children by voting
- October 20 Red Ribbon Poster Contest Deadline to Submit to LAPTA
- October 23–31 National Red Ribbon Week
- October 25 Submit new membership dues at LouisianaPTA.org/membership
- October 27 Deadline for Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.**
- October 30 LAPTA Red Ribbon Poster Contest Winners Announced

November 2023

- November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
- November 15 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- November 17 LAPTA Literacy Grant Deadline (<https://form.jotform.com/221748002230038>)
- November 17 Reflections Theme Contest Submission Deadline <https://form.jotform.com/221745830340147>
- November 18 Statewide Election Day – Advocate for all children by voting
- November 25 Submit new membership dues at LouisianaPTA.org/membership
- November 30 LAPTA Reflections Theme Search Winners announced

December 2023

- December 1 LAPTA Literacy Grant Winners Announced
- December 5 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- December 20 Submit new membership dues at LouisianaPTA.org/membership

January 2024

- January 22 Reflections Submission Deadline to LAPTA
- January 25 Submit new membership dues at LouisianaPTA.org/membership

February 2024

- February 9 Louisiana PTA's 100th Birthday
- February 13 Mardi Gras Day
- February 17 National PTA Founders' Day
- February 28 Submit new membership dues at LouisianaPTA.org/membership

March 2024

- March 1 LAPTA Reflections Program LAPTA winners announced
- March 1 LAPTA Day of Service Grant application deadline at LouisianaPTA.org/grants
- March 1 Newsletter Award application deadline at LouisianaPTA.org/awards
- March 1 Advocacy Award application deadline at LouisianaPTA.org/awards
- March 2 Read Across America Day (nea.org)
- March 22 Deadline for Volunteer of the Year Award and Mentor-a-PTA Award
- March 25 Submit new membership dues at LouisianaPTA.org/membership
- March 27 LAPTA Healthy Minds Grant Application Deadline at LouisianaPTA.org/grants
- March TBA National PTA Legislative Convention (LegCon)

April 2024

- April Transition Time and Planning for the Year Ahead
- April 1 Deadline for Creative Teacher Grants at LouisianaPTA.org/grants
- April 1 Deadline for membership reports for LAPTA Annual Membership Awards
- April 20 LAPTA Recognition Ceremony and State Meeting; Winners announced for Day of Service Grants, Creative Teacher Grants, Volunteer of the Year, and Outstanding Newsletter Awards
- April 25 Submit new membership dues at LouisianaPTA.org/membership
- April 28 Submit officer data at LouisianaPTA.org/register

May 2024

- May Transition Time and Planning for the Year Ahead
- May 1 LAPTA Healthy Minds Grant Winners Announced
- May 6-10 Teacher Appreciation Week
- May 25 Submit new officer data at LouisianaPTA.org/register
- May 25 Submit new membership dues at LouisianaPTA.org/membership

June 2024

- June 1 Search and publicize Summer Learning Programs at PTA.org and your local community
- June 25 Submit new officer data at LouisianaPTA.org/register
- June 30 Submit new membership dues at LouisianaPTA.org/membership
- June TBD National PTA Virtual Convention (tentative dates)



GETTING STARTED

Once elected as President, get organized early. Talk with the outgoing President and set a date for a formal transition of records. Ensure Board members have met with their predecessors to receive Procedure Binders and relevant information. Request and review a copy of the Bylaws from LAPTA to ensure it is the most current. Set up the personal “Presidential” work environment by creating folders on a computer and cloud storage for shared files. Also, organize the new President’s binder and file space at home. Browse LouisianaPTA.org, PTA.org, and join PTA Leader group on Facebook to connect with other PTA leaders. Follow LAPTA on Facebook.

Financial Check Up

Coordinate with the new Treasurer to have the signature cards for bank accounts updated with new signers at the beginning of the fiscal year. Authorized bank signers may have debit cards issued in their name and the name of the PTA. Review the Bylaws to determine the number and requirements for check signers. Minutes from the election meeting are necessary to enact the change, as well as other requirements established by the bank. Facilitate, if necessary, arrangements for documents to be delivered to the Audit Committee after the fiscal year ends and in the beginning of the school year. See *LAPTA Toolkit: Treasurer* for financial details.

Starting Your PTA Work

The newly elected President should call and conduct a meeting of the newly elected officers within 30 days of the election. Have an agenda for all meetings. Schedule a planning meeting for the Board of Directors (BOD). The BOD includes the executive officers (President, Vice-President(s), Treasurer, and Secretary), the principal, parliamentarian, standing committee chairs (if specified in the Bylaws), and additional committee and chair positions such as historian, faculty representative, and student representatives (as specified in the 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. Review the current Bylaws and create the Standing Rules with the entire Board. The Standing Rules contain the specifics on how the PTA is organized and run. 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, before sending any correspondence, or before discussing PTA business with the principal.

When filling open positions on the BOD, strive for a balance of experienced and new members who represent campus demographics. All Board members should submit their names and contact information at LouisianaPTA.org/submit-officer-data-1 as soon as possible each year.

Meet with the principal to discuss school plans for the year and keep them informed of PTA activities throughout the year. Establish a calendar in cooperation with the principal to include school holidays, Board meetings, General PTA meetings, PTA special events, all PTA election dates, dates for selecting budget and nominating committees, PTA program deadlines, PTA Founders’ Day on February 17, Membership dues deadlines, membership awards deadlines, LAPTA grant deadlines, LAPTA Leadership Training, and PTA conventions and conferences. Reference the LAPTA Calendar.

See the end of this section for the *President’s Duties Checklist*. **It is also recommended that the President review all sections of the LAPTA Toolkit.**

BUILDING THE BOARD OF DIRECTORS

The two types of PTA committees are **standing committees** whose work is ongoing throughout the year and **special committees** whose work is a specific short-term task. The President is invited to all committee meetings. *Learn more at LAPTA Toolkit: Board of Directors.*

The number of standing committees necessary to do the work of the PTA depends on the size of the membership, programs and activities, and the interests of the community. The newly elected President calls a meeting of the newly elected officers within 30 days of the election to appoint the standing committee chairs and fill any vacancies in the officer positions, subject to the approval of the Board of Directors. Check the Bylaws and Standing Rules for a list of the committees and their duties. The committee chairs should represent a cross-section of the membership. Recruit experienced, as well as new, Board members and committee chairs. It is not the President's job to find all the Board of Director members and committee chairs. Get recommendations from past and current Board members, principal, teachers, office staff, and the membership. PTA welcomes all people! Filling all Board positions as quickly as possible after the election meeting permits everyone to attend LAPTA training in August and allows time for planning the coming year's work. It is okay if a few Board positions remain open as this allows newcomers to get involved in the fall.

Leadership potential develops, PTA interest increases, and PTA work expands when committee members are diverse, receive training materials such as LAPTA Toolkit, utilize PTA.org, become familiar with PTA Purposes, collaborate with Board members on common goals, and maintain a procedure binder. Create committees to fit the needs, programs, and projects of the Local PTA. Use only those committees that are needed.

- Advocacy
- Arts in Education/Reflections
- Public Relations
- Diversity, Equity, and Inclusion
- Environmental
- Family Engagement
- Fundraising
- Handbook/Directory
- Healthy Lifestyles
- Historian
- Hospitality
- Inclusiveness
- Library & Literacy
- Membership
- Mental Health
- Parent Education
- Programs
- Room Representatives
- Spiritual-Character-Citizenship
- Student Representative
- Teacher Liaison
- Volunteer
- Website
- Youth Protection

Special committees and subcommittees are used as a way of engaging more people in the work of PTA. The subcommittees are small workgroups that do the work for the committees. At least one committee member should serve on each subcommittee, usually as chair and the President is always invited to all committee meetings. Create special committees for a specific purpose. The committee automatically dissolves as soon as it accomplishes that purpose and presents the committee report, or the term of office ends.

The principal is a member of the PTA Board and, oftentimes, is the only constant in an ever-shifting leadership group. A good working relationship between the principal and a healthy PTA can lead to a great learning environment for students and families. The PTA President and the principal must communicate regularly and work together for the good of all concerned. Presidents need to remember that they are in the principal's school as a guest; however, the principal must also understand that the PTA is governed by its Bylaws, which may limit the PTA's response to some requests from the school. See *Dos and Don'ts of Partnering with Administrators* later in this section. A **teacher** may serve on the Board and a **student** may serve on the Board especially for PTSAs. See *Dos and Don'ts of Partnering with Teachers* later in this section.

To communicate effectively with the Board, use a good app such as GroupMe or Band App. Board members shall use PTA emails that are handed down from year to year and not personal emails. President, Treasurer, and Secretary shall keep a list of all passwords and recovery information.

PICK YOUR PTA PROGRAMS

The key to a successful PTA is to support the mission of PTA which is to make each child's potential a reality. **National PTA Programs** provide access to engaging, educational, and fun opportunities that inspire, recognize, and impact all students and their families. There are many programs that can help Local PTA Units make an impact in their community.

LAPTA also offers a Mentor-a-PTA Program that a strong, active PTA mentors a smaller, protected, or new PTA unit (Mentee) that needs a helping hand with the implementation of PTA values and goals. As we are all part of Louisiana, the success of one is the success of all. A Mentee PTA might like to sit in on a Board meeting, or perhaps see the agendas, Welcome Packet, membership forms, school flyers, and more. It is another way to reach out to others in the community and state. The focus of this program is to mentor through guidance, planning ideas, monthly check-in, and leadership support. Mentors are upbeat, positive advocates who provide tools and direction to the Mentee PTA. If there is a financial contribution, then it must be approved by the General Membership and included in the annual budget. Give the members ownership in the philanthropic work of the PTA. If the PTA would like to participate as either the Mentor or the Mentee, please email President@LouisianaPTA.org. There is no deadline for this.

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

- **School of Excellence**: Enroll to become key partners in school improvement initiatives and gain national recognition for demonstrating excellence in family-school partnerships.
- **Reflections Art Program**: Encourage and celebrate student participation in arts education through the nationwide awards program.
- **Family Reading Experience**: Engage families of K-5 students in fun, interactive activities that teach core reading skills.
- **STEM + Families**: Explore science, technology, engineering, and math (STEM) with their family-friendly, interactive activities.
- **Healthy Lifestyles**: Learn about the three pillars of Healthy Lifestyles: body, mind, and earth. Access these resources to create healthy changes in schools.
- **PTA Connected**: PTA Connected strives to help children act safely, responsibly, and thoughtfully online.
- **National PTA as a Grantmaker**: National PTA offers millions of dollars of grants to provide extra support to PTAs to help run their programs.

LEADERSHIP DEVELOPMENT & TRAINING

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

- 1) **LAPTA Development Days**: LAPTA offers in-person training and development in southern Louisiana on August 19, 2023, and in northern Louisiana on August 26, 2023. Local units will receive registration information from LAPTA. Please make sure the new officers' information is submitted to LAPTA as soon as they are elected at LouisianaPTA.org/register.
- 2) **LAPTA Zoom Training Meetings** are held in September. The recordings will be posted online at LouisianaPTA.org/training.
- 3) **LAPTA Individualized Training**: LAPTA also offers one-in-one training as needed. Contact Kayla Pagel at President@LouisianaPTA.org to schedule a meeting.

FINANCES

Every PTA must have a budget that is approved by its general membership before it can spend money beyond the “Startup Funds” budget line item. Determining PTA goals is a key step in the budget process. The use of funds outlined in the budget should reflect those goals. After the budget is drafted, it is presented by the committee chair to the Board of Directors for consideration and then to the General Membership for approval. Adoption of the budget requires a majority vote of the members at the General Membership meeting. The budget is presented item by item to allow for discussions and amendment. All expenses for the PTA are disbursed in accordance with the approved budget for that year. Funds do not have to be fully spent each year.

Amending the Budget: The budget is an estimate of the planned revenue and expenses for the year. When there are additional expenses, differences in revenues, or a change in an approved expense, the budget must be amended by a vote of the General Membership at any regular meeting or at a special meeting called for that purpose. Any additional proposed expenditure or fundraising not provided for in the budget must be presented to the association for approval before proceeding with the project or payment. To amend something previously adopted, it is necessary to have a two-thirds majority if no meeting notice was given or a simple majority if notice was given.

PTA Books and Records: The Treasurer is responsible for maintaining the books and records of the PTA. The books include the check book, deposit forms, check requests, the approved budget, budget reports, filing taxes, and more. Online accounting software is recommended such as MoneyMinder.com. There is no ruling from the IRS, National PTA or LAPTA that limits the amount of money that a Local PTA Unit may carry over from one year to the next. This will vary from one PTA to another. If the PTA continues to carry over large sums of money, reduce the number of fundraisers to bring revenues in line with program requirements.

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

PTA Audit: The purpose of an audit is to certify the accuracy of the books and records of the Treasurer. It also assures the membership that the organization's resources and funds are being managed in a professional manner. The audit process need not be complicated. A committee of three people, none of whom are authorized to sign checks, can certify the records, using the simple procedure detailed in the LAPTA Toolkit: Treasurer. The annual audit is due to LAPTA on October 27, 2023, and should be reported to the membership.

Treasurer's Reports: The Treasurer prepares budget reports for all meetings showing actual income and expenses compared to the budgeted income and expenses. This includes meetings for the Executive Committee, Board of Directors, and General Membership.

Fundraising is not the primary function of the PTA. The real working capital of a PTA lies not in its treasury, but in its members' energy, resourcefulness, and determination to promote the well-being of children. Funds are raised when needed to conduct PTA work. Do not raise money just to raise money. National PTA suggests that when planning the year's activities, PTAs should use the **three-to-one rule**: for every fundraising activity, there should be at least three non-fundraising projects aimed at helping parents or children or others to advocate for school improvements. See *LAPTA Toolkit: Treasurer for more details*.

MONEYMINDER AND CHEDDARUP

Louisiana PTA encourages Local PTA Units to utilize online platforms to track finances and collect membership dues. While there are several platforms, LAPTA recommends and uses **CheddarUp.com** to collect membership dues and **MoneyMinder.com** to track finances. **MoneyMinder and CheddarUp partnered with each other. If you have MoneyMinder Pro account (\$179/year), you get CheddarUp Team for free!**

[MoneyMinder.com](https://www.moneyminder.com) is simple accounting software for volunteers and makes tracking expenses and deposits and running reports as simple as possible. It is also easily shareable from one Board to the next with continual access to past years. Cost is \$179 per year. MoneyMinder has a new feature that allows you to e-file Form 990-N and 990-EZ directly to the IRS. Add *easy tax filing* as another bonus! A free alternative is the Wave App at waveapps.com.

[CheddarUp.com](https://cheddarup.com) is a site that allows a PTA to create a custom website to sell items, collect membership dues, upload documents, and include forms or information collecting. The account must be in the PTA's name under their EIN. CheddarUp also requires a personal Social Security Number to open an account, which must come from an authorized bank signer. This should be changed for future Boards. CheddarUp has spreadsheet reports that show detailed information on collections. All deposit transfers from CheddarUp must occur at least monthly directly into the PTA bank account and with a completed summary Deposit Form. The spreadsheet reports are compatible with Microsoft Excel or Libre Office which is free (libreoffice.com). To see a sample CheddarUp site, visit FriendsofLAPTA.CheddarUp.com.

MEMBERSHIP

Membership is the backbone of PTA. See the *LAPTA Toolkit: Membership* and PTA.org for ideas on membership campaigns. Memberships are good for one year starting on July 1 and expiring on June 30. When a member submits dues to the Local PTA Unit, the Local PTA Unit is required to submit \$3.50 per person in dues to LAPTA. This amount includes \$1.25 dues that go to LAPTA and \$2.25 dues that LAPTA forwards to National PTA. This means that the member is a member of their PTA, LAPTA, and National PTA. Submit dues at memberdues2023.cheddarup.com. See the *LAPTA Toolkit: Membership* for complete details.

CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*everychild.onevoice*). When used properly, PTA's logo and tagline create a consistent message, help to unify all PTAs, and set PTA apart from other organizations. The success of the PTA brand identity depends on all PTAs' adherence to the guidelines. PTA.org provides a uniform, effective system for PTAs to maintain a consistent, visual style and brand identity for all PTA-produced materials. Visit [PTA.org/home/run-your-pta/PTA-Branding-and-Web-Guidelines](https://pta.org/home/run-your-pta/PTA-Branding-and-Web-Guidelines). Download "**Customize Your PTA Logo**" Power Point file to type in the PTA name and save the customized logo.

Just as a Chick-fil-A franchise would not change the logo of the company for its location, Local PTA Units may not change the PTA logo. It is a registered trademark. **The PTA Blue is Pantone 541c, or hex code #1A3E6F, or RGB (26, 62, 111). Only PTA Blue, black, or white may be used. The font is Arial Black.** The Registered Trademark symbol must follow "PTA" and the tagline "*everychild.onevoice*."



MEETING TYPES

Meetings are held for members to make the decisions that direct the actions of the PTA and to be kept informed of the business conducted on their behalf. Only members participate in meetings. Non-members may attend but may not participate unless they are offered a *Courtesy Seat* or are listed on the agenda. **General Membership Meetings** include PTA members who paid their dues and direct the PTA work. **Executive Committee Meetings** consist of elected officers plus possibly others listed in the Bylaws. **Board of Director Meetings** consist of the President, Vice-President(s), Treasurer, Secretary, principal, parliamentarian, standing committee chairs (if specified in the Bylaws), and additional positions listed in the Standing Rules such as faculty representative and student representatives. Only Board members attend Board meetings. A non-Board member may request the President's permission to address the Board to ask a question, give a report, or provide information, and then leave the meeting without participating in discussion or the voting process.

There are two types of meetings. **Regular meetings** are those set up by the Bylaws and the Board at the beginning of the year. **Special meetings** are those called, with appropriate notice, to 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.

ELEMENTS OF SUCCESSFUL MEETINGS

All meetings share certain common elements. Some meetings may be more formal than others, but all must be organized and well run to be effective. An agenda establishes the order of business. Be sure to follow the agenda, discussing and completing each item before going on to the next. It is much less confusing to stick to one topic at a time. The use of parliamentary procedure protects the rights of the members, while allowing the group to discuss the business at hand. PTA uses Robert's Rules of Order, Newly Advised to govern all meetings.

Set regularly scheduled meeting dates at convenient times for General Membership and Board of Director meetings to allow people to plan. Perhaps schedule meetings on two different dates or times to allow more people to attend. Check with other PTAs, feeder schools, and others in the community to coordinate dates.

The Presiding Officer should arrive early, know the Bylaws, know parliamentary procedure, keep calm, be tactful, appreciative, courteous, charitable, and well-groomed. The President, or the Vice-President in the President's absence, is the presiding officer. The presiding officer calls the meeting to order at the specified time and, if a quorum is present, proceeds with business. The President refers to themselves impersonally as "the chair." In formal meetings of the General Membership, the President takes no part in business and should not express an opinion while presiding. The President facilitates the business before the group. In meetings with fewer participants, such as the Executive Committee, the President may participate and parliamentary procedure may be less formal.

Preparing the Agenda

Robert's Rules of Order, Newly Revised states that the Secretary may prepare the agenda. However, many Presidents prefer to prepare it themselves. Read the previous minutes to find any business left unfinished at the last meeting. Confer with officers and committee chairs to see if they have a report. Have names of those who will speak written on the agenda. Do not call on anyone who does not have a report.

Parliamentary Procedure

Parliamentary procedure is a consistent set of rules that governs associations. The rules protect the rights of all attendees, require courtesy to all, and show partiality to none. It is not necessary to know all the rules, but a good basic knowledge is helpful in conducting a productive meeting. Have a copy of the Bylaws and Robert's Rules of Order, Newly Revised available at meetings for reference. It is helpful to have a Board member with some knowledge of parliamentary procedure. Most PTAs do not need a registered parliamentarian at every meeting.

Quorum

According to Robert's Rules of Order, Newly Revised, a quorum is the number of voting members who must be present to conduct business legally. The quorum refers to the number of such members, which is established in the Bylaws. For Board meetings, it is 50% of the Board roster plus one. Do not count a person more than once even if they serve in more than one position. Every meeting shall have the membership roster available and use a sign-in sheet. This is the best method to use when establishing a quorum. *A sample Roster sign-in sheet is in the LAPTA Toolkit: Secretary.*

ORIENTATION MEETING

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

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

PRESIDENT'S BINDER

It is particularly important to keep an organized and up-to-date binder, which should *at least* include:

- Accounts & passwords summary sheet (see below); Board roster
- Expense Forms and Deposit Forms
- 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, budget reports from all meetings
- Record of all debit cards and their account numbers (*See LAPTA Toolkit: Treasurer for regulations.*)
- All Committees with their information and details
- Calendar with school, PTA, and LAPTA dates and deadlines
- Confidentiality, Ethics, and Conflict of Interest Policy signed by the Board of Directors
- Inventory Accountability Form
- Membership roster, Miscellaneous papers, and correspondence.

AGENDAS

It is important to have an agenda to make sure business is conducted efficiently. The following is the normal order of business with further explanations below. *A sample agenda and sample Meeting Script are at the end of this section.*

- Call to Order
- Opening (Mission statement; optional)
- Approval of Minutes
- Treasurer Report (filed for audit)
- President Report
- Principal Report
- Officers Reports
- Standing Committees Reports, as needed
- Special Committees Reports, as needed
- Unfinished Business
- New Business
- Program
- Announcements
- Adjournment

Minutes

It is important that the minutes reflect an accurate account of what occurred at a meeting. They should be entered into the official minute journal. If it is not in the minutes, then it did not occur. Minutes should be brief and indicate actions taken. The minutes should show the type of meeting (Executive Committee, Board of Directors, General Membership, Special, etc.), PTA name, date, time, location, name of presiding officer or Secretary, attendance (use roll call at Board meetings), a statement concerning the disposition of the minutes of the previous meeting (whether accepted or accepted as corrected), a record of all motions, the names of the maker of the motion (but not the name of the member who seconded it) and what action was taken on the motion, program topic, method of presentation, speakers and important points covered, and time of adjournment. *Full details are in the LAPTA Toolkit: Secretary.* **Approval of the minutes does not need a motion.** Once the "draft" minutes are read or submitted for review, corrections are solicited and made if applicable, the minutes then become the "official" minutes and record of the PTA.

Treasurer's Report should show balance of funds on hand and expenses and deposits itemized to show the amount received or spent in each budget category. Actual budget amounts should be compared to budgeted amounts. A motion is not made to approve the financial statement or reports, except on the initially proposed budget. The statement is filed as part of the record.

Committee Reports

From time to time, committees might need to report their progress to the General Membership. Usually, the chairperson presents the report. Not every report will require action. If a report gives information only, a motion is **not** needed to accept the report. The report is "heard" and placed on file with the Secretary. If a report requires the approval of the members, the person making the report moves its adoption by making a motion. Because the recommendation for action comes from a committee, the motion requires no second. Once the motion is on the floor, it is debatable and amendable as is any other motion.

Programs

A well-planned program provides an opportunity for PTA members to increase their knowledge about areas of interest. Programs should encourage active participation of all members. There are many good resources for sources of information. Refer to PTA.org for program ideas.

Adjournment

After the program, 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." Adjourning the meeting before the program is not an acceptable practice. Many PTAs have a social time with refreshments after the close of the meeting.

PARLIAMENTARY PROCEDURE

Parliamentary law or procedure originated with the British Parliament. They maintain order, ensure justice and equality, expedite business, and enable an organization to accomplish the objectives for which it was formed. These rules are based on logic, good sense, and fair play. It is democracy in action. Every member should understand at least the fundamentals or correct procedures. Robert's Rules of Order, Newly Revised is the parliamentary authority adopted by all levels of PTA.

Parliamentary procedure requires all to accept the will of the majority and respect the opinion of the minority. The President, as the elected leader, is to carry out the will of the assembly, not bend the will of the assembly to their own. Remember, authority is vested in the office, not in the person.

All members are equal. An established number of voting members must be present to conduct business, or quorum. **Quorum** is the minimum number of members who must be present to conduct business at a meeting. The number of General Membership members constituting a quorum is indicated in the Bylaws. Only one main motion may be before the assembly at a time and only one member may have the floor at a time. A two-thirds vote is necessary when a motion limits or interferes with the privileges of a member or of the assembly Bylaws, cutting off debate, closing nominations, and rescinding action without notice.

A motion (or "action") formally proposes for the organization to take a certain action or express certain views. A motion introduces business in a meeting. A main motion brings a subject before the organization for its consideration and action. There are eight steps to a motion:

- 1) **Obtaining the floor:** member rises and addresses the chair by proper title.
- 2) **Assigning the floor:** the chair recognizes the member.
- 3) **Member states his motion:** member says, "I move . . ."
- 4) **Seconding the motion:** another member must second the motion letting the chair know that more than one person has an interest in the subject of the motion by saying, "I second the motion."
- 5) **Stating the motion:** chair restates the motion thereby formally placing the motion before the assembly. After the chair has stated the motion and before a vote is taken, it may be desirable to change or amend the motion in some way.
- 6) **Discussion (or debate):** must be addressed to the chair and continues until no one wishes to speak or until someone moves to close debate. To close the debate, a member says, "I move the previous question." The motion requires a second, is not debatable and requires a 2/3 vote. If the motion to close debate is adopted, the chair immediately takes the vote on the motion pending.
- 7) **Putting the question (or taking the vote):** The chair restates the motion, states the method of voting, and calls for both affirmative and negative votes.
- 8) **Announcing the vote:** the chair announces the result of the vote and states the action the assembly will take.

Motions must be expressed in a clear, concise statement containing only one main idea. The correct language is "I move that" or "I move to." The maker of the motion should be allowed, if he wishes, to begin discussion. A motion that does not come from a committee must be seconded. On rare occasions, the presiding officer may enter a discussion. He must relinquish the chair for the duration of the discussion and the vote. The President may vote on a pending question when their vote would change the outcome to break a tie. The President may also vote when voting is by ballot so as to keep their opinion private and not sway the members.

Rules of Conduct

No one has the right to do anything that prevents others from seeing or hearing the presiding officer or speaker. No one has the right to converse, move about or stand, except to address the presiding officer. If several members rise at the same time to claim the floor, the chair recognizes one and the others shall be seated immediately. The chair calls upon the others as soon as possible.

PROBLEM SOLVING

Resolving conflict can be time-consuming and quickly drain a Local PTA's resources. Most problems are related to communication issues. It is often important to talk with people directly versus emailing or hearing of issues from other individuals, to get to the heart of the matter. When handled properly, conflict can create positive outcomes, such as promoting growth, increasing communication, developing problem-solving skills, increasing team building, and bringing about change. Steps to problem-solving within the PTA are:

- Create an open and friendly environment and respect other leaders.
- Give clear expectations of outcomes.
- Allow individuals to do their own work.
- Communicate any limitations for a proposed project (budget restrictions, timing, etc.)
- Privately provide encouragement and publicly offer praise.
- Provide information referencing where resources can be found whenever possible.
- Listen when concerns are raised.
- Investigate problem situations from all sides.
- Share best practices and solutions to problems.

How to Handle Disruptions in Meetings

The PTA that is informed and alert can best guard against disruptions. However, it may not be possible to avoid. The presiding officer should maintain poise in the face of interruption, wait for the disrupter to finish, suggest that the speaker be allowed to finish his sentence or thought, and suggest that in this group it is regarded as simple courtesy not to interrupt a speaker. If the disruption continues, repeat the above statement, but do not try to out-talk or out-shout the other person. If there is whispering in small groups, remain silent to get attention. Do not start talking again until the whispering stops. If name-calling is resorted to, calmly say, "Of course, you are entitled to your own opinion. May we go on now?" If integrity is challenged, do not be defensive. Suggest that opinions are not facts. Do not mislay your sense of humor. A humorous remark has pricked more than one inflated balloon or relieved many a tense situation.

Parliamentary Procedure Tips

The chair recognizes the privilege of everyone to agree or disagree with the views of a speaker. The speaker is stating his opinion and is not asking for conclusions from the audience, so interruptions are inappropriate. Board members with a background in parliamentary procedure should be present to aid the President with helpful motions at opportune times. Honest differences of opinion may be discussed at the close of the meeting.

The Bylaws should contain the following statement: "The privilege of making motions, debating, and voting shall be limited to members of the association who are present and whose dues have been paid." It may be helpful to call this to the attention of the group or to an individual who is not a member of the association. The Secretary should have a current list of those members who have paid their dues and are voting members. If a discussion is to be held which has the potential of becoming heated, it is helpful if ground rules for debate are established and accepted by the group in advance. While people other than members may be present, remember that the PTA still has the privilege of restricting the right to speak and vote to its members.

School Level Complaints

Occasionally, a PTA President or Board member will receive a call from someone who has a problem or complaint about something that happened at the school. The PTA is not responsible for handling complaints about the school or the staff. Parents and students have rights and responsibilities, and the PTA can act as a resource by providing information. Beyond that, the individual must follow prescribed district procedures to solve the problem. Refer the parent to the school district's policy on handling complaints. The usual "chain of command" is: 1. the teacher, 2. the principal, 3. the principal's supervisor, 4. the superintendent, and 5. the School Board.

PRESIDENT'S DUTIES CHECKLIST

Monthly Duties

- Prepare agendas and preside over the Board of Director and General Membership meetings.
- Review and distribute the Treasurer's report and the minutes of the previous meeting for approval.
- Confirm that National and Louisiana PTA dues and membership lists are submitted to LAPTA.
- Check the Bylaws and Standing Rules for dates of upcoming required business.

Familiarize yourself with the following:

- Your PTA Bylaws and Standing Rules. Request a current approved copy from Bylaws@LouisianaPTA.org.
- Get a copy of Robert's Rules of Order, Newly Revised.
- Visit LouisianaPTA.org and go through all pages. Create an account at PTA.org for additional resources.

Get Organized and Begin Planning

- Call a meeting of newly elected officers within 30 days of election to approve the appointment of historian and parliamentarian (if one is indicated in the Bylaws) and to appoint standing committee chairs.
- Ensure Board members met with their predecessors to receive relevant information.
- Have all Board members register with LAPTA at LouisianaPTA.org/register.
- Encourage Board members to attend LAPTA Development Days and Training.
- Have Board members subscribe to National PTA electronic publications.
- Assess needs and set goals and objectives with the Board and the principal.
- Have a meeting with the principal to set the calendar for the year and review PTA goals.
- Know the PTA's Federal Employer Identification Number (EIN) and PTA LUR#.
- Arrange for a meeting at the bank to change signers on the PTA's account. Call the bank for requirements.
- Set up President's binder and Presidential digital folders on a computer or cloud storage for shared files.
- Follow PTA social media. Have at least two current administrators on all PTA accounts.

June/July/August

- Attend the National PTA Convention in June if the budget allows.
- Attend LAPTA Development Days and Training in August.
- Obtain and change the passwords to the PTA's accounts.
- Schedule an introductory meeting with the principal.
- Request the current Bylaws from LAPTA and ensure that each Board member has a copy.
- Prepare an agenda for the first Board meeting.
- Review the LAPTA Records Retention Policy. Note any changes needed for adoption.
- Have the Board sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Verify the schedule of monthly Board meetings for the entire year.
- Review submission dates for insurance policy. Insurance for the PTA is required.
- Renew Articles of Incorporation Annual Report with Louisiana Secretary of State at geauxbiz.com.
- Preside over the first General Membership meeting of the year.
- Form the Audit Committee who will work on the Annual Audit Report due by October 27, 2023.
- 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.
- Host a volunteer orientation.
- Create a Welcome Packet include a membership ask, calendar, PTA Programs, and more.
- Adopt the Annual Report and Audit Report if complete.
- Create or update the CheddarUp.com account for the year to offer online membership purchase.
- Create the new year and budget on MoneyMinder.com (highly recommended) or waveapps.com.

September/October

- Preside over the first General Membership meeting of the year if not held in August.
- Approve the proposed budget at the first General Membership meeting.
- Appoint a committee to review Bylaws and recommend revision or amendments if needed.
- Communicate PTA goals for the year.
- Complete the Active Affiliation Report for LAPTA at LouisianaPTA.org/activeaffiliation which is due October 27, 2023.**
- Confirm the program for the next General Membership meeting.
- Touch base with each officer/chair about upcoming duties or events.
- Share the *LAPTA Toolkit: Awards, Grants, and Contests* with the Board.
- Conduct the fall membership enrollment campaign. Submit member dues at LouisianaPTA.org/membership.
- Conduct the National PTA Reflections program. See LouisianaPTA.org/reflections.

November/December

- IMPORTANT:** Confirm that the Treasurer electronically filed the appropriate IRS return 4 ½ months after the close of the fiscal year. This is November 15 if the fiscal year ends on June 30.
- Check-in with officers and committee chairs.

January/February

- Celebrate National PTA Founders' Day on February 17, 1897.
- At a General Membership meeting, elect a Nominating Committee and alternates as prescribed in the Bylaws.
- Ensure that the first meeting of the nominating committee is scheduled and provide clear instructions and guidelines to the Nominating Committee.
- Amend the budget, as necessary.

March/April

- Publish slate of candidates, as determined by the nominating committee, according to Bylaws.
- Conduct election of new officers in the month(s) designated in the Bylaws.
- Actively recruit volunteers to fill open committee chair positions for next year.
- Remind the newly elected President to call an Executive Committee meeting within 30 days to fill Board positions and conduct any other necessary business.
- Connect current PTA leaders and volunteers with those at feeder schools' PTAs.
- Check-in with officers and committee chairs.
- Contribute to the PTA Annual Report or coordinate with historian/Secretary.
- Consider a membership survey to review past activities and solicit suggestions for new activities.
- Attend National PTA Legislative Conference.

May/June

- Present the Annual Report at the last General Membership meeting, which is a summary report of the year's activities.
- Coordinate installation of new officers. Thank this year's PTA Board and school volunteers.
- Submit the new officer contact information to LAPTA at LouisianaPTA.org/register.
- Remind outgoing officers and committee chairs that their procedure binders and materials must be submitted within 15 days after the end of the term. Consider a transition meeting or event.
- Pass all information along to the newly elected President, including all passwords to all accounts.
- 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. Thank you!

ACTIVE AFFILIATION REPORT ***VERY IMPORTANT***

Each membership year, local PTAs must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have “Active Affiliation” means that the Local PTA Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes nine items and are submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTA Units who do not maintain Active Affiliation will be subject to the Retention Plan. Deadline to submit the files is **October 27, 2023**.

DUE OCTOBER 27, 2023

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



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

RETENTION PLAN

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

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

PARTNERING WITH ADMINISTRATORS

Louisiana PTA issues **Operating Guidance** to further advise and support Local PTA Units on PTA best practices. See LouisianaPTA.org/guidance. Email LAPTA President, [Kayla Pagel](#) for further clarification.

Do:

- **Plan together.** Learn administration goals and discuss how the PTA can engage families to support them.
- **Connect to resources.** Talk about how LAPTA and National PTA programs and resources support and enhance student learning. See PTA.org/home/programs#programslist.
- **Be respectful.** Communicate in a professional manner with the school's leadership even if you disagree.
- **Differentiate.** Help school administration understand that the Local PTA Unit is a separate and independent child advocacy group, which is part of and supported by a large and experienced association.
- **Meet regularly.** Consider a regular monthly coffee or lunch with the principal or arrange a regular phone call. Invite the superintendent to Board meetings. Stay in touch.
- **Make the connection visible.** Ask the principal to provide a report at PTA meetings, or to write an article for the PTA's newsletter or post for the PTA blog. Plan an open-to-all "chat with the principal" or "coffee with the superintendent."
- **Engage families.** Share the National PTA Standards for Family-School Partnerships materials. Collaborate on building better family engagement and improving student success. Consider registering in the National PTA Schools of Excellence program.
- **Engage community.** Invite community groups or youth-serving organizations to the school for PTA events. With the principal, identify community service opportunities for families.
- **Encourage participation in the budget process.** Give parents the info they need to effectively advocate during budget time. Help parents support the education budget.
- **Stay on the same page.** Follow up all phone calls and meetings with a summary of what was discussed and confirmation of any action steps to be taken by the PTA or administration.
- **Ask to speak at teacher meetings.** Ask to be treated as a partner in education, a vital part of the connection between home and school.

Don't:

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

PARTNERING WITH TEACHERS

Louisiana PTA issues **Operating Guidance** to further advise and support Local PTA Units on PTA best practices. See LouisianaPTA.org/guidance. Email LAPTA President, [Kayla Pagel](mailto:Kayla.Pagel@LouisianaPTA.org) for further clarification.

Do:

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

Don't:

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



FUNDRAISING STRATEGIES

The following seven questions help to analyze fundraising strategies and activities to select those that best meet student, school, and community needs. Use these questions as a guide to brainstorm effective fundraising strategies that will raise the money the school and community require and educate the students about the value of philanthropy.

1. What values provide the basis for why you are raising funds? Fundraising efforts should be focused on why the fundraising needs to be done. The first step is to identify the need, the opportunity, or the problem to be solved. Don't fundraise just to fundraise. There needs to be a reason and a need. Once the problem and solution is known, identify the values or concerns that a prospective donor must have to want to give to this cause. Ask volunteers to identify groups in the school and community that have expressed those key concerns and values. The final step in the planning process is selecting fundraising strategies that align with the identified values and that attract potential donors' attention to the need or cause. All of us use our time and money to reinforce what we value. Are the fundraising strategies based on values? Do the volunteers understand the need?

2. What is the cost per dollar raised for this fundraising activity? Efficient fundraising incorporates the cost per dollar raised as part of the fundraiser selection criteria. The math is quite simple: just divide the expected costs by the anticipated revenue. In almost all product sales fundraisers, 50 percent or more of the revenue (sales) goes to provide the product. When looking at the other costs involved, like the cost of making posters, the cost per dollar raised is even higher. In addition, factor in how much time from the students, parents, PTA organizers, teachers, and advisors is required even though time is not a direct cost.

3. Does this fundraising strategy give donors options? Does the fundraiser allow donors to give more of their money or time if they want to? Consider allowing a donor to determine their own level of support. Donors want to be able to give their help, time, and money according to how much they value the organization, goals, and programs. Make sure donors are free to decide how much and how often they contribute and what their level of involvement will be.

4. If students are involved in the fundraising activity, are they learning about the concept of philanthropy? Does student involvement focus on giving or on getting? Philanthropy has become a compelling force in our economy. Seldom do our students get exposure to or encouragement in careers in philanthropy, even though much of our nation's job growth is in the nonprofit, philanthropic area. Philanthropy is important to our society. The giving of resources, such as time and money, provides meaning to our lives and service to others. Today's student is tomorrow's donor and member of service clubs, religious groups, and nonprofit boards. If students realize that their school fundraising efforts are practice for the rest of their lives, the more seriously they will take these activities.

5. Does this fundraiser involve incentives or prizes for sales? Sales incentives focus a fundraiser on competition and getting something rather than on values and giving. Remember to focus on giving.

6. Have you considered the integrity of businesses offering support? Partnering with a local corporation can be a beneficial fundraising strategy. It demonstrates community support and creates awareness about the school's needs. It is important to evaluate any company that might be aligned to the school or PTA.

7. How will this fundraiser and the projects and programs it supports benefit the community? School fundraising activities should positively affect the community. Having better schools improves the community, but how do school and PTA projects affect a community? Whenever possible, explain the connections between the project and the world outside the school.

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

YEAR-END CHECKLIST & TRANSITION GUIDANCE

There are several key things PTA leaders must do before the end of the school year. By completing these tasks, the successor will start off on the right foot, while the outgoing board enjoys their summer guilt-free.

- Meet with the successor as soon as possible. In advance of the meeting, prepare a timeline of the past year. Cover the job basics, the timeline, a summary of where things stand now, etc. Review the past budget. Schedule a follow-up turnover meeting, if needed.
- Hold elections! **Email the new officers' contact information to office@LouisianaPTA.org by May 25.**
- Pay any remaining outstanding membership dues at LouisianaPTA.org/membership.
- Close out the books on June 30. Make sure all reimbursement requests are submitted in time to write checks before the books close. Ask about any outstanding checks not yet cashed.
- Go to the bank with the new Board members and switch account signature responsibilities, as necessary. Make sure the right people are on the bank account for the incoming year.
- Make sure the Treasurer's Year-End Checklist is complete.

Notes to pass on to successors:

- 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.
- Final thoughts for the new leadership team's success.

The Outgoing Board should always:

- Meet to debrief and evaluate the work for the year and offer suggestions for improvements.
- Fully complete their term and tasks.
- Meet the successors.
- Tell the new Board to register at LouisianaPTA.org/register even if some are remaining.
- Turn over all resources and materials in a timely manner.
- Host a get together honoring the outgoing Board and celebrating the upcoming journey of the new Board.
- The outgoing officers should support the new Board, as well as step back and let go.

The Incoming Board should always:

- Create a profile at PTA.org.
- Register for LAPTA Training Events and attend the LAPTA Annual Meeting.
- Familiarize themselves with PTA.org and LouisianaPTA.org.
- Register with LAPTA at LouisianaPTA.org/register.
- 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 to begin the new budget planning.

ICEBREAKERS

An easy way to promote inclusion at PTA meetings is to encourage members to interact with each other. Include an icebreaker at PTA meetings as a fun way to get people acquainted and to feel included. It's a great way to start meetings and encouraging engagement and meaningful introductions before diving into business. When picking an icebreaker, consider:

- **Main Goal:** Determine whether the goal is to help people get to know each other better, to inspire some fun competition, or to have people walk away having learned something new.
- **Inclusivity:** Keep in mind that participants might have different abilities, interests, and beliefs. Make sure it is accessible and does not exclude anyone from actively participating.
- **Interactive:** Ice breakers are a great way to help people mingle and step out of their comfort zone. Plan an ice breaker that helps participants spark new connections and relationships.

Icebreaker Examples:

1. **What Do You Love?:** Each person states one thing that is non-PTA related that they love. Then others who also love the same thing raise their hands or otherwise gesture.
2. **Culture Club:** Participants break into small groups and pick three areas of their families' cultural values including traditional foods, typical dress, and what is or is not acceptable in overall appearance, histories, traditions, and holidays that are a source of pride, taboo topics, etc. Each person shares their answers.
3. **Meet Someone New:** Each person shares what month they were born and finds someone born the same month that they don't know well. What's one other thing they have in common?
4. **Name Tag:** This icebreaker could be used as an initial get-acquainted exercise. As each participant enters the meeting room, they can sign their name as usual, but present them with a different person's name tag. They should seek one another out and introduce themselves to other participants.
5. **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. Perhaps they are named after someone specific, or maybe their last name means something in an ancestral language.
6. **Just By Looking at Me:** This activity allows participants to disclose some personal information that others may not know. The goal is to demonstrate that there is much more to a person than "meets the eye". Form a circle with chairs if participants are able. Pass around the following script on paper: "My name is ___ and I am from ___. One thing you cannot tell just by looking at me is ___." Demonstrate the prompt by filling it in yourself and model the exercise.
7. **Trivia Game** is a way to spark fun competition between participants, while also providing an opportunity to learn something new. Create a list of 15-20 interesting and fun facts related to the theme of the trivia game. Choose the format to use to host the trivia game. You can use an online trivia platform to build out your activity for a gameshow effect or take a more traditional approach of using paper or whiteboards. Both options could work in a virtual or in-person setting.
8. **Guess Who** helps you get to know people in the room through interesting facts without having participants introduce themselves. Have each participant write one or two facts about themselves, either on a piece of paper or have them submit anonymously via email or a google form prior to the meeting. Take turns reading the facts out loud and guess who the fact belongs to. Once the correct person is identified, they can elaborate on their fact, and then they will read the next one. Repeat until all facts have been read.

SAMPLE AGENDA

Madison High PTA Board Meeting

January 19, 2023

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
Newsletter: Angie, Doris
Uniforms: Caroline
Grants & Awards: Christie
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's Report – MinutesStephanie

Treasurer's Report – Budget Review; Bank Balance: \$ ##.###Caroline

President's Report –Tera

- Library Movie Night; Slime date, Bring-a-Buddy Breakfast; teacher treat day note

Committee Reports

- Principal's ReportMrs. Welch
- Membership CommitteeKatie
- Volunteer CommitteeSandra
- FundraisingTera
- HospitalityJenn
- Room MomsKristie
- ReflectionsShelley
- Art ParentsAmy
- BeautificationBessy
- Library CommitteeAmy
- NewsletterAngie
- UniformsCaroline
- Grants & AwardsChristie
- Teacher RepresentativeSarah

New Business

- Upcoming Flyers/Events -Beth

Old Business

Important Dates

Jan 23-26	Bring-a-Buddy Breakfasts	Feb 21	Board Meeting at 9:30
Jan 31	Dominos night	Mar 21	Board Meeting at 1:30

Adjournment..... Tera

SAMPLE MEETING SCRIPT (FORMAL)

Call To Order (Required)

The President, as the chair, stands and calls the meeting to order. The President declares if a quorum is present, and the Secretary notes the fact in the minutes. Quorum for the Board meeting is the majority of filled positions or 50% plus one (no one counts twice). Quorum for General Membership meeting is stated in the Bylaws. If the Secretary or the parliamentarian is not present, the chair appoints member(s) to perform those responsibilities for the meeting.

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

Opening Ceremony (Optional)

The PTA Mission, Pledge of Allegiance, or an inspirational message may be presented. These are suggestions.

- Option 1 PRESIDENT: "Please welcome _____, who will read the PTA Mission."
- Option 2 PRESIDENT: "Please stand for the Pledge of Allegiance of the United States (and Louisiana)."
- Option 3 PRESIDENT: "Please welcome _____, who will share an inspiration with us."

Introductions (Optional)

Begin introductions with special guests.

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

Explanation of Meeting Technology and Rules for Virtual Meetings

PRESIDENT: "In order to make sure everyone is comfortable with our meeting technology, let's review a few options you may need today throughout the meeting. (*Explain how to raise hand, unmute, chat, and any other features to be used. If using the free version of Zoom, explain that the meeting may not exceed the 40-minute limit.*) During the registration process, we verified all email addresses. Should we need to conduct a ballot vote, it will be emailed. During this meeting, we follow these rules: The chair gives the chance to speak to every member who wishes it. Pro and con speakers should be given alternating opportunities to speak, if possible, and all speakers should tactfully be kept to rules of order and to the question. Each member has two opportunities to speak to the motion. A member may exercise their first opportunity to speak and then, after every other member has the chance to speak, may speak only once more. All statements must be addressed to the chair and not to another member. The chair recognizes a member who has not previously spoken to the motion in preference to one who has spoken. The chair does not enter the discussion. Should the President wish to debate, the chair must ask the Vice-President to preside. The President may vote when the vote would change the outcome (to make or break a tie) or when the voting is by ballot. Debate continues until no one wishes to speak or until someone moves to close debate. Members cannot close debate by shouting, 'Question.' A member must seek recognition, properly make the motion, and acquire a 2/3 vote to pass."

Minutes (Required)

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

- Option 1 - PRESIDENT: "_____, Secretary, will now present the minutes from the last meeting. SECRETARY: (reads minutes) PRESIDENT: "Thank you; are there any corrections to the minutes? [PAUSE] Hearing none, the minutes will be approved as read." Or, if corrections are needed. "The minutes are approved with corrections."
- Option 2 - PRESIDENT: "The draft of the minutes has been distributed for your review. Does anyone need a copy? Are there any corrections to the minutes? Hearing none, the minutes will be approved as presented." Or, if corrections are needed. "The minutes are approved with corrections."

- Option 3 - PRESIDENT: “The minutes of the prior meeting were approved by the committee on _____. A copy of the minutes is available from the Secretary, and 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 of this meeting. Hearing no objection, the chair appoints _____, _____, and _____.” *The chair may appoint a committee to approve the minutes from the current meeting. Committee approval is recommended when the length of time between meetings causes concern for accuracy.*

Financial Report (Required)

The chair recognizes the Treasurer for the financial report. The Treasurer stands, addresses the chair, and reads the report. A financial report is not optional and must be presented at every meeting. 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. The chair takes questions and then the report is filed for financial reconciliation. All information is recorded in the minutes. 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 \$_____, as of [date]. Here is the reconciliation report and the current budget compared to actual amounts on the screen.” PRESIDENT: “Thank you, are there any questions? Hearing none, the financial report will be filed in the record.”

Letters or Communications

The Secretary reads any communications received, as requested by the President. Actions are considered, if required.

Board of Directors Report

A summary report of the Board’s work is given at every General Membership meeting and contains any motions made in the Board meetings. The Secretary reads a summary report (not the minutes) for the information of the members. The Secretary moves the adoption of each recommendation individually. PRESIDENT: “_____, Secretary, will give the Board 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. _____, would you like to speak to your motion?” *(Person making the motion may speak to their motion.)* “Is there any further discussion? (pause) _____ has moved that _____. All those in favor, say ‘aye.’ (pause) Any opposed, say ‘no.’” *President announces the outcome of the vote, “The motion passed/failed.”*

Officers Report

Before the meeting, the President consults with all Board members to determine who has a report. At the meeting, the President calls for the report of the officers. A report from an officer may be informational or require action. Reports with information only are read to the voting body and no motion is needed. Those reports requiring action are presented as a motion to the membership. The member presenting the report moves the adoption of the motion. The members will vote to approve either as presented, amended, or rejected. PRESIDENT: “At this time, _____ will give a report regarding _____.” OFFICER: *Reads the report and makes any recommendations.* “I move that _____.” PRESIDENT: “_____ has moved that _____. Is there a second? _____ would you like to speak to your motion? *The person making the motion will speak to their motion.* “Is there any further discussion? Are you ready for the question (vote)? _____ has moved that _____, all those in favor, say ‘aye.’ Any opposed, say ‘no.’ The motion passed or failed.”

Approval of Budget

The proposed budget for the next fiscal year is presented to the Board of Directors for its consideration, not approval. At the General Membership meeting, the budget is considered for approval. PRESIDENT:

“ _____, chair of the Budget Committee will now present the 20__ - 20__ proposed budget.”

TREASURER: Each line item should be read. After reading the items state “By direction of the budget & finance committee, I move that the 20__-20__ proposed budget be adopted as presented.” PRESIDENT: “The Budget Committee has moved to adopt the 20__-20__ 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.”

Budget Amendments

When the Treasurer proposes any budget amendments: PRESIDENT: “ _____ will now present the budget amendments.” TREASURER: Each line item should be read, the current amount, the amount of the increase/decrease; then the new amount of the line item. After reading the items, state “I move that the budget amendments be approved as presented.” PRESIDENT: “ _____ moved that the budget amendments 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.”

Standing Committee Chair Reports

Before the meeting, the President consults with all Board members and standing committee chairs to determine who has a report. At the meeting, the President calls for the reports of the committees. 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 presenting the report moves the adoption of the motion. If no recommendation is made, no motion is needed. Use the same script as above.

Special Committees and/or Special Orders

The chair calls for the report of the special committees, if needed. The reports of special committees follow the same rules as those for standing committees. If no special committees exist, this item of business does not appear on the agenda. Motions that made a “special order” (by a two-thirds vote at an earlier time) are addressed. Matters required by the Bylaws to be taken up at a specific meeting are addressed at this time.

Audit Report

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

PRESIDENT: “ _____, the chair of the Audit Committee, will now present the Audit Report.” CHAIR OF

AUDIT COMMITTEE: The chair reads the Audit Report, and then says, “By direction of the Audit Committee, I move to adopt the Audit Report as presented.” PRESIDENT: “ _____ has made a motion to adopt the

Audit Report as presented. 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.

Appointment of Nominating Committee

PRESIDENT: “The next item is the appointment/election of the Nominating Committee; our secretary _____ will now 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 election. PRESIDENT: “The floor is now open for nominations for members of the Nominating

Committee.” The chair should call on anyone who has raised their hands until all nominations have been made.

Individuals may nominate themselves. If a member nominates someone else, the chair should ask that person if they will accept the nomination. The nominating committee is elected by plurality. PRESIDENT: “The

nominating committee will be _____, _____, and _____, with _____, and _____ being alternates to the committee.” *For elections, see LAPTA ToolKit: Elections and Nominating Committee.*

SAMPLE PASSWORDS & ACCOUNTS SUMMARY

ABC PTSA Passwords & Accounts 2023-2024

PTA LUR #: 9999

IRS EIN# 99-9999999

Monthly/Annual Renewal Required for the Following:

GeauxBiz.com: login email & password

LA Charter #: 999999 ; NAKS #: 999999

IRS.gov for Form 990N: login username & password; email & phone associated with account; other security question answers; Note where to file 990: irs.gov - File - charity & nonprofits – finding filing forms – Form 990 series returns – Form 990 N – submit form 990; or **Efile.form990.org**: name, login ID #, password

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

Moneyfinder.com: email & password

CheddarUp.com: email & password; ABCPTSA.CeddarUp.com; phone; backup security code

SquareUp.com: 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 admins

Bank: screenname, email & password; routing # 99999999, acct # 99999999

Debit Cards: person's name, account number, expiration date, CVV Code

Email Accounts: (the President might only hold this.)

email & password; phone associated with account; backup email

email & password; phone associated with account; backup email

email & password; phone associated with account; backup email

Closed Accounts' Previous Login Information:

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

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

Members of the Board of Directors of the PTA 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.

In consideration of the PTA's affiliation with Louisiana PTA, for the protection of its integrity and its 501(c)(3) 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, decisions, and funds are involved.
3. Not misuse the PTA's federal tax-exempt status for personal or unauthorized purposes nor disburse funds for any purpose other than authorized, budgeted PTA programs, projects, and activities.
4. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA name or brand.
5. Publicly present a united front on decisions made as a Board.
6. Maintain confidentiality as a member of the Board.
7. Follow the LAPTA and school district guidelines for fundraising.
8. Abide by the following **Conflict of Interest Policy**:
 - a. Board members and their families shall not use their relation to this PTA for financial, professional, business, employment, personal, or political gain.
 - b. A conflict of interest exists when a Board member would have to participate in the deliberation or decision of any issue of this PTA while, at the same time, the board member and their extended family has financial, professional, business, employment, personal or political interests outside the PTA that could predispose or bias the board member to a particular view, goal, or decision.
 - c. Board members shall declare to the officers of this PTA conflicts of interest (stating the nature of the conflict and pertinent information as appropriate) between their duties of this PTA and their or their extended families' financial, professional, business, employment, personal or political interests.
 - d. When a conflict of interest is declared, the Board members shall not use their personal influence of position to affect the outcome of a vote and shall leave the room during deliberations and the vote.
 - e. **The minutes of the meeting shall note any declared conflict of interest.**
 - f. Board members shall not use PTA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.
 - g. Board members shall not directly or indirectly use their current PTA position, the PTA name or organization for or against any specific candidate for elected public office, which is contrary to federal tax laws and the guidelines and policies of the PTA.

PTA Leader Toolkit 2023 – 24

Section 3: Treasurer

LouisianaPTA.org/treasurer



LouisianaPTA.org

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PTA is a ^v~~noun~~. **VERB!**

Louisiana Parent Teacher Association

INTRODUCTION

The Treasurer is the authorized custodian of the funds of the PTA. The President, who bears full responsibility for the affairs of the unit, and Board members, who have a fiduciary responsibility to the PTA, should have a good understanding of all financial matters. The Treasurer receives and disburses all money as prescribed in the Bylaws, the adopted budget, or as authorized by action of the PTA. Through adoption of the budget, the membership determines how all PTA funds will be earned and spent. If all money is received and spent within the rules set by the Bylaws, the budget, and the IRS, the chances of problems decrease dramatically.

A unit's money does not belong to the Treasurer. Even if the Treasurer does not agree with the membership's decisions about the budget, he must follow the will of the organization. Additionally, the financial records are the property of the PTA, not an individual officer. A Treasurer shall turn all records over to their successor or to an Audit Committee. Many units move thousands of dollars through the PTA account. For the protection of both the PTA unit and the Treasurer, it is important that funds be managed in a manner that allows every dollar to be traced. Some requirements might seem tedious, but it is time well spent.

Familiarize yourself with LouisianaPTA.org/treasurer. This is important! Contact Ashley Snell, LAPTA Treasurer, at treasurer@LouisianaPTA.org with any questions or concerns.

RESPONSIBILITIES OF THE TREASURER

- Register as a PTA Leader at LouisianaPTA.org/register.
- Sign the LAPTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Study and know the PTA Bylaws, Standing Rules, and LAPTA Toolkit: Treasurer.
- Attend LAPTA training; if possible, attend National PTA training and conventions.
- Change signatures on all bank accounts. Use the school's mailing address for the account.
- Function as sole custodian of the checkbook.
- Maintain the Treasurer's Binder with all required financial documents. See suggested tabs in the following section.
- Chair the Budget Committee.
- Present the proposed budget for approval by majority vote at the first General Membership meeting.
- Receive all money and deposit them in a timely manner. National PTA suggests one day.
- Make disbursements with a check or debit card as authorized by the PTA in accordance with the budget.
- Keep an accurate and detailed account of all money received and disbursed.
- File the annual IRS taxes or hire a professional to file the annual taxes. The fiscal year for most PTAs ends on June 30 with taxes due 4 ½ months later which is November 15.
- Renew the annual Articles of Incorporation with the Louisiana Secretary of State at geauxbiz.com.
- Renew the annual insurance policy (required).
- Reconcile all accounts monthly.
- Transfer funds from all online accounts monthly, such as CheddarUp.
- Submit a budget report at all Board and General Membership meetings.
- Make an annual budget report to the PTA.
- Prepare the Treasurer's Binder with the Year-End Financial Review Checklist.
- Present to the Audit Committee all materials necessary for the review.
- Purchase PTA memberships monthly from LAPTA at LouisianaPTA.org/membership.
- Recruit new PTA leaders and PTA members.

TREASURER'S BINDER

It is important to keep an organized and up-to-date binder, which should include the following sections.

- Accounts & passwords summary sheet including account numbers for debit cards and Board roster
- Blank copies of expense and deposit forms
- Completed expense forms and receipts
- Completed deposit forms
- Monthly bank statements and reconciliation reports
- Approved budget, Budget Approval Form, monthly budget reports
- All agendas and minutes from Executive Committee, Board of Directors, and General Membership meetings
- Charter information such as IRS tax filings, Bylaws, Standing Rules, LAPTA Toolkit: Treasurer plus Sections 1, 5 and 10, Secretary of State Articles of Incorporation Annual Report, insurance policy, and past audit reports
- Miscellaneous papers, including correspondence
- Receipt book to acknowledge cash received (not necessarily in the binder)
- Checkbook to disburse funds as authorized (not necessarily in the binder)

MONEYMINDER AND CHEDDARUP

Louisiana PTA encourages Local PTA Units to utilize online platforms to track finances and collect membership dues. While there are several platforms, LAPTA recommends and uses **CheddarUp.com** to collect membership dues and **MoneyMinder.com** to track finances. **MoneyMinder and CheddarUp partnered with each other. If you have MoneyMinder Pro account (\$179/year), you get CheddarUp Team for free!**

[MoneyMinder.com](https://www.moneyminder.com) is simple accounting software for volunteers and makes tracking expenses and deposits and running reports as simple as possible. It is also easily shareable from one Board to the next with continual access to past years. Cost is \$179 per year. MoneyMinder has a new feature that allows you to e-file Form 990-N and 990-EZ directly to the IRS. Add *easy tax filing* as another bonus! A free alternative is the Wave App at waveapps.com.

[CheddarUp.com](https://www.cheddarup.com) is a site that allows a PTA to create a custom website to sell items, collect membership dues, upload documents, and include forms or information collecting. The account must be in the PTA's name under their EIN. CheddarUp also requires a personal Social Security Number to open an account, which must come from an authorized bank signer. This should be changed for future Boards. CheddarUp has spreadsheet reports that show detailed information on collections. All deposit transfers from CheddarUp must occur at least monthly directly into the PTA bank account and with a completed summary Deposit Form. The spreadsheet reports are compatible with Microsoft Excel or Libre Office which is free ([libreoffice.com](https://www.libreoffice.com)). To see a sample CheddarUp site, visit FriendsOfLAPTA.CheddarUp.com.

PRINCIPLES OF PTA FINANCIAL MANAGEMENT

All PTA funds must be deposited directly in the PTA's bank account and never in a personal, school, or other organization's account.

Each Local PTA Unit is an independent 501(c)(3) organization that collaborates closely with its supported school. PTA funds are considered by law to be private funds donated or raised by the membership and deposited for the exclusive use of the association. School accounts consist of public funds generated through taxes and distributed to the schools via legislation or other acts of government. The school is, therefore, accountable to the public for the expenditure of its funds. Funds raised by the PTA belong exclusively to the membership. They are not reportable except to the membership of the Local Unit, as are public funds. PTAs are not required to provide financial reports to the school administration or school board. Therefore, all PTAs must maintain separately controlled accounts that are under the direct control of the PTA and its Board of Directors. School officials have no control over PTA funds except to the extent that a PTA works in cooperation with the principal to determine school needs and the PTA's assistance in meeting those needs.

Without an approved budget, there is no authorization to expend funds.

The proposed budget must be approved at the first General Membership meeting of the year. Until then, PTAs may only spend the amount of money listed in the previous year's "Startup Funds" line item. Every budget must have a "Startup Funds" line item to allow for purchases prior to budget approval. Any additional proposed expenditure or fundraising project not included in the approved budget must be presented to the PTA for approval before proceeding with the project or payment.

When filing taxes with IRS, do not record the Louisiana and National PTA dues as income.

Local Units are required to submit member dues to LAPTA at \$3.50 per member per year. LAPTA then pays National PTA \$2.25 per member per year. These funds submitted to LAPTA are not to be calculated as gross income on the IRS tax filing. Only report the "net" income from member dues on the tax report. However, the Local Unit **budget** will reflect the actual gross and net income for dues. For example, a PTA collected 100 memberships for \$750. The PTA then submitted 100 membership dues to LAPTA for \$350. The net income from membership dues is \$750 - \$350 = \$400. On the IRS filing, record only \$400 as dues income.

Never sign a blank check or make a check out to "cash."

A check can be written in advance with everything filled in but the amount. Proper documentation is required as with any expenditure. Never write a check to cash. The check should be made payable to the person or business responsible for the fund.

Always have two people sign every expenditure.

All Bylaws require two signatures to authorize every purchase. Individuals authorized to sign checks may not be related to each other by marriage or any other relationship nor should they be a part of the same household. Local PTA Units may use debit cards issued only to those authorized on the bank account if every purchase is properly documented with receipts and two signatures on the Expense Form.

Do not allow another organization (including the school) to pass its money through PTA accounts.

All money deposited into a PTA account is considered PTA funds by the IRS and must be reported as such, excluding the portion of member dues paid to LAPTA and National PTA.

Pay bills with a check or debit card. Never pay with cash. PTA credit cards are not allowed.

Bond all officers and chairs who oversee money to protect the PTA's assets through annual insurance.

Always have cash deposits counted and signed by two people.

Always issue a receipt for cash received.

BUDGET

The budget is a financial guide that outlines estimated income and expenditures based on the Local PTA Unit's goals. To be effective, the budget must determine what realistic expenses will be for the year and how to secure the necessary funds to meet these disbursements. The budget should cover the fiscal year which is a 12-month period. The Bylaws specify a unit's fiscal year with most units starting on July 1 and ending on June 30.

It is important to note that while PTAs help raise significant resources for schools and children, fundraising is not part of the primary mission of PTA which is **to make every child's potential a reality by engaging and empowering families and communities to advocate for all children**. PTAs fundraise to support the vital programs and services on campus that support student learning and family engagement. A unit should raise only what is needed to meet expenses. Money raising activities should not absorb so much time, thought, and effort that other projects are neglected and the attention of members diverted from the purposes of PTA.

It is better to overestimate income rather than underestimate. All budgets must include a **Startup Funds** line item to allow for purchases to be made before the General Membership has approved the new budget. Once the budget is approved, the Budget Approval Form must be completed and sent to LAPTA as part of the Active Affiliation Packet. See LouisianaPTA.org/activeaffiliation.

The Budget Committee

The Treasurer is the chair of this committee. Composed of three to five members, it has the responsibility for developing a proposed budget. Members might include the past and current President, past Treasurer, and the principal. The Bylaws specify if members are elected or appointed. To develop the budget, the committee should review the previous year's budget and the Treasurer's reports to make recommended changes. Gather information from officers and committee chairs about their planned activities and financial needs. Consider sources of funds to meet these requirements. If a unit has identified programs or projects to conduct, it might want to budget expenses first. Knowing the expense figures helps determine how much revenue is needed. Or a unit can budget revenue first and then determine its programs and projects.

Creating a Budget

In every budget, total income must equal total expenses with Zero as the net total. There should be a line item for every major category or event. It should be simple but detailed to permit all income and expenses to be correctly categorized. The following template works well with MoneyMinder.com and *is only a suggestion*. See *sample budget later in this section*.

- Create a main **Fundraising** section and list each event's gross income and the expenses resulting in the net income such as a Fun Run, Gumbo Cook-Off, grants, general donations, and uniform sales.
- Create a **Student and Parent Programs** section and its items such as PBIS support, mental health speaker, honor roll events, Santa & Hot Cocoa Night, Grandparents Bingo, newsletter, and STEM Night.
- Create a **Teacher, School, & Community** section and list its items such as Staff Welcome Lunch, Staff Snack Days, Staff Appreciation Week, Playground Equipment, Community Outreach, and more. Hospitality should not exceed 5% of the budget and should only include *Welcome Committee* type expenses. Teacher lunches and events should each have their own line item.
- Create an **Administration** section for items such as PTA membership dues, insurance and bonding, Articles of Incorporation renewal, subscriptions like Zoom, CheddarUp.com, MoneyMinder.com, and website, leadership training with LAPTA and National PTA, bank fees and interest, copies, postage, **required Start Up Funds**, Carry Forward & Ending Balances, a small Miscellaneous line item (<\$1000), and more. Start Up funds are the only amount that may be used prior to budget approval. Once the budget is approved by the General Membership, these early expenses should be applied to the appropriate line item in the budget. The **Carry Forward & Ending Balance** is used to hold the amount of money remaining at the year end. You don't have to spend all of the money each year. Email Treasurer@LouisianaPTA.org with questions.

Scholarship & Mission Fund

PTAs may choose to have a Scholarship and Mission Fund. Objectivity and equal access are the most important issues to consider when awarding scholarships to students, teachers, or other PTA units. Procedures determining how the committee is formed and how recipients are selected should be in writing. No one should serve on the committee if he or she has a child or relative applying. The source of funds for scholarships might be a **Mission Fund** for which the PTA solicits contributions. A Mission Fund may take many years to build to a sufficient level to fund scholarships, grants, and special projects. This is allowable if the PTA has a written plan of its intentions and follows this plan. Donors need to be made aware of the status of the plan prior to contributing. A 1099-MISC is not required for scholarships. Recipients need to be informed that any portion of the funds received not used for school fees such as tuition, books or lab fees is taxable income. Beyond making the scholarship recipient aware of this issue, a PTA unit has no further obligation.

LAPTA also offers a Mentor Program where a strong, healthy PTA mentors a smaller or new PTA unit that needs a helping hand with guidance support and/or by donating \$1000. To join the program as either a mentor or mentee (the one in need), email president@LouisianaPTA.org.

Obligating Future Boards

As a 501(c)(3) organization, a PTA cannot obligate future Boards to a contract or a specific expenditure. A future Board is not required to spend funds as designated by the previous Board. Large, long-term projects should be very carefully planned and undertaken only if there is dedicated support from the General Membership with those funds put into their own account, such as a Mission Fund.

Noncommercial Policy

PTA Bylaws include the requirement to be noncommercial which means the PTA name shall not be used with commercial activities of other organizations including the promotion of the other's goods or services. Additionally, a PTA does not raise money for other organizations or individuals, no matter how worthy the cause.

Budget Approval

The Treasurer presents the proposed budget to the Board of Directors for consideration. The budget is reviewed by the Board of Directors to make sure all committee expenses have been included. The proposed budget is then presented to the General Membership for approval at the first General Membership meeting of the year. The budget should be presented item by item to allow for discussion and amendment. A verbal majority vote is required for adoption. **Without an approved budget, the unit can only spend the Startup Funds.**

Amending the Budget

Because the budget is only an estimate of the planned expenditures and income for the year, amendments might be necessary. Amendments can be made at any General Membership meeting or Special Meeting called for that purpose. A majority vote with 20-day previous meeting notice, or two-thirds (2/3) vote with no meeting notice, is required to pass the amendment.

BANKING & E-COMMERCE POLICY

Local PTA Units may utilize electronic commerce to receive and spend money. See detailed policies below. There are many options such as CheddarUp.com and SquareUp.com. If a PTA uses MoneyMinder Pro (\$179/yr), they can get CheddarUp Team Edition free!

Employer Identification Number (EIN): An IRS Employer Identification Number (EIN), also known as a Federal Tax Identification Number (TIN), is a nine-digit number assigned to business entities by the Internal Revenue Service. A unit's EIN identifies it as a non-profit organization. LAPTA requires each PTA to apply for an EIN when it organizes. This number is used on all bank accounts and tax returns. Never use an individual's Social Security Number to open a bank account. Some online processing businesses and the application for an EIN do require a personal Social Security Number.

Authorized Signatures: Acquire signature forms from a bank for checking and any other accounts. The Treasurer must be listed on the forms to be authorized to sign checks and withdraw funds. Only current elected PTA officers have the authority to sign checks. Three people are required as signers on the checking account. Check signers are not allowed to sign a check payable to themselves. All PTA expenditures and checks require two signatures. **A school employee may have signing authority on a PTA account ONLY if they are an elected officer of the PTA.**

Checking Account: Every unit will have its own bank account. Banks require an EIN, Articles of Incorporation, and minutes from the election of the Board naming who will be signatories, plus other possible documentation to open an account. Never use an individual's Social Security Number to open a PTA account. Each unit must have its own EIN. Local Units cannot use a school or school district's EIN.

Savings Account: A unit may have a small contingency savings account to maintain financial stability. As a guide, the amount in the account should not exceed one-half of the unit's budget for an average year. Other accounts might be established for designated funds raised for a specific purpose over the years, such as a Playground Fund.

Debit Cards are issued only to authorized signers on the bank account and must include the name of the PTA. The Treasurer logs who has a debit card and its account number. Cash transactions (ATM, cash back, etc.) are not allowed. Credit cards are not allowed. Prior to use of the debit card, an Expense Form is completed with two signatures and submitted. Following the purchase, the receipt is given to the Treasurer and attached to the Expense Form. A change in signer on the checking account requires the previous debit card to be destroyed. The minutes shall reflect the approval of debit cards for the PTA and shared with the bank. Recurring payments for PTA expenses are allowed to be deducted directly from the bank account with properly documented Expense Forms using a debit card or e-check.

Online and/or point of sale payment collection systems must be in the PTA's name. If a personal Social Security Number is required as per Federal banking laws, then only an authorized signer may be used. The payment collection system's statements must be clear with detailed and accessible information on a real-time basis. The PTA must have immediate access to know who has paid, the purpose of the payments, and the expected cash transfer amount. All revenue is entered into the budget's corresponding line item.

Venmo and Zelle are NOT allowed because it is an unregulated peer-to-peer platform. They do not have the same high standards and regulations as federal banking rules. The use of Venmo is not covered by insurance and bond policies, leaving the PTA vulnerable to fraud and theft. PayPal is currently allowed.

All deposit transfers must occur at least monthly and use a Deposit Form. One Deposit Form can be used for multiple transactions. When accepting credit card payments, know the payment collection's policies on handling cards that do not read correctly. Do not write down card numbers for any reason. Accept only those transactions that are immediately authorized. The PTA does not record account numbers for future settlement. For electronic payment disputes, the PTA should research the payment collection system's policies on challenging a disputed payment. Only the Treasurer may issue a refund to the customer. Respond to any challenge of payment promptly and accurately. Confirming a refund requires the same approvals and documentation as required for an Expense Form. Record the authorized refund in the check registry prior to withdrawal. Withhold goods and services until the dispute is cleared. Treat disputes in the same manner as a non-sufficient funds check.

Deposits: It is important that the Treasurer receives all funds for the PTA and promptly deposits them into the PTA's bank account. National PTA recommends depositing funds within one day. One should only manage PTA funds and may not deposit funds of other organizations into the PTA account. A signed Deposit Form shall accompany each deposit with two signatures required for cash deposits. The Deposit Form is included in the forms section.

Two people shall count all deposits. The chair turning over the money keeps a copy of the Deposit Form or may request a receipt from the Treasurer for their records. The Treasurer should not keep cash in their car or home. The deposit should be made on the day of collection. If a large amount of money is to be collected at a time when the banks are not open, make arrangements for a night deposit or to use the school's safe. Prior to placing money in the school safe, it must be counted by two PTA Board members. Document the amount and sign. After making a deposit, the Treasurer should attach a copy of the deposit slip, the bank receipt, and copies of deposited checks if possible.

The PTA may deposit checks electronically via a mobile application or online system. After depositing, write on the front of the check, "Deposit Completed," confirmation number, and the date. Consult with the bank regarding how long to keep checks prior to destroying. Proper documentation is required as with a traditional bank deposit and confirmation of the deposit should be attached to the Deposit Form for all relevant checks.

PTA sponsorships may be offered by local PTAs in return for intangible benefits. For example, for a \$250 sponsorship, a PTA may include a company's logo and name in their monthly newsletter, on a banner hung on the school fence, or in a post on a social media site. PTAs often provide tiers of sponsorship based on donation levels. The guidelines for sponsorships mirror the noncommercial policy and co-venturing guidelines.

Donors And Charitable Contributions: PTAs must be prepared to issue receipts for contributions made, regardless of the amount or value. Canceled checks are not sufficient. There is no required format for the receipt, and Social Security Numbers are not required. At a minimum, the receipt must reflect the donor's name, date, cash amount received or a description of the property received (but not the value), a statement that no goods or services were provided by the organization in return for the contribution, and the PTA's name. If a donor receives the value of goods or services for the donation, only the portion in excess of the value is deemed a donation. A description and good faith estimate of the value of goods or services that an organization provided (if any) in return for the contribution must be included in the written acknowledgment. A donor cannot claim a deduction of \$250 or more unless the donor obtains a written acknowledgment of the contribution. Sample General Donation Form is at the end of this section.

PTAs are required by IRS disclosure rules to inform prospective donors about the extent to which their contributions are legally tax-deductible. If a PTA holds a fundraising event that provides a meal or some tangible item in return for the purchase of a ticket, then the portion of the ticket that is tax-deductible is the ticket price less the fair market value of the meal or item received. For example, if a spaghetti supper ticket sells for \$20 and the value of the meal is determined to be \$5, the purchaser is entitled to a \$15 charitable contribution deduction. The \$5 is not the cost to the PTA, but the value of a prepared and served meal allowing for a reasonable profit.

Expenses: Pay PTA expenditures with a check or PTA debit card. Every purchase must have a signed Expense Form with a receipt or invoice attached. Approving the budget is the way the membership of the PTA approves unit spending. If there is no line item to support a request for payment, payment may not be made. Occasionally, a request for reimbursement may be made without a receipt. The receipt was lost, or personal items were used such as stamps or the partial cost of a toner cartridge for printing materials. The person may complete an Expense Form and attach a detailed explanation. The Expense Form is at the end of this section.

Gift Cards or Certificates: Any gift cards or certificates purchased by a PTA should not exceed \$25 each in value and must be retail-specific (branded cards of restaurants, stores, etc.). Generic cards like MasterCard or Visa gift cards are not permitted. Gift cards are cash equivalents, so PTAs should exercise the same care when storing and distributing gift cards. If a gift card is donated to the PTA for the purpose of subsidizing PTA expenses, record the initial donation on a Deposit Form and then how the card was used on an Expense Form.

Field trips are a wonderful way to give back to the school community. However, whether the field trip is the PTA's event or the PTA gifts money to the school for a field trip, the PTA might face liability. Gifting money to the school significantly reduces liability but is no guarantee the PTA will not be held liable. Contact the PTA

insurance provider to review the insurance coverage.

PTA Membership Dues: Local Units must submit dues of \$3.50/member to LAPTA, which includes the National PTA and LAPTA dues portions. According to the IRS, the National PTA and LAPTA dues portions never belong to a Local Unit. They should not be included in the budget as money to be spent for budget planning purposes. They are also not included in the gross receipts when reporting income to the IRS. The \$3.50/person dues that are paid to LAPTA are excluded from the IRS tax filing.

Local PTA Units are an affiliation of National PTA and Louisiana PTA which have a membership structure. When the local member at a school submits PTA dues, the Local Unit is required to submit \$3.50 in dues to LAPTA. This amount includes \$1.25 dues that go to LAPTA and \$2.25 dues that LAPTA forwards to National PTA. Dues are submitted to LAPTA through CheddarUp.com. E-checks are the preferred payment method. Submit unit dues at memberdues2023.cheddarup.com. LAPTA does not provide paper membership cards. The template for membership cards is available at LouisianaPTA.org/membership. PTA memberships are sold to individuals. If a PTA wishes to sell family memberships, it must collect enough to cover the state and national portions of \$3.50 per person in the family. For this reason, family memberships are discouraged.

Bank Statements & Reconciliation: The PTA's permanent mailing address for bank accounts is the school's address. All bank statements must be physically signed by a person who is not authorized on the account. Reconcile the bank statement each month and compare with the register balance to ensure that bank and financial records are correct. After reconciliation, present the report at PTA meetings for review and file the report in the Treasurer and Secretary Binders. For the protection of the PTA, it is recommended that a Board Member who does not sign checks also reconciles the bank statement.

MoneyMinder.com is a financial site that works with non-profits and is used by LAPTA. It makes the transition between old and new Treasurers much easier, keeping all banking information easily accessible from year to year. The cost of \$179/year must be included in the budget. A free alternative with similar accounting use is waveapps.com.

Checks Returned for Non-Sufficient Funds (NSF): If a check is returned due to insufficient funds, email or call the writer of the check and request repayment be made within 10 days. They might ask to redeposit the check or send money order or cash. Remember to inform the person that he owes bank fees charged to the PTA. Keep a detailed log of all contacts with the check writer, bank, or parties involved. If payment is not received within 30 days from the initial contact, send a certified letter and request a return receipt. The letter should include a demand for payment and bank fees in cash. Do not accept another check. Keep a copy of the letter for the files. Sample letter is at the end of this section.

INSURANCE & BONDING - REQUIRED

Operating a PTA unit is much like running a small business. Businesses have insurance to protect their investments. LAPTA requires PTAs to obtain adequate insurance protection against liability and monetary loss due to fraud, embezzlement, or dishonest acts. Purchase insurance coverage from a company such as Association Insurance Management (AIM), a company that offers coverage to PTAs and other non-profits at a reasonable price. Remember to annually renew the insurance policy. For more information, contact **AIM at (800) 876-4044 or AIM-companies.com**. AIM offers several types of coverage. Ask about adding social media or online protection coverage.

AUDIT COMMITTEE & REPORT

What? An audit follows financial transactions through the records to be sure that receipts are included and that expenditures are made as authorized in the approved budget and in conformity with PTA Bylaws. The audit must review all accounts of the PTA.

Why? The audit is necessary to protect both the PTA and the officers and to ensure the new administration understands the PTA's financial status. A proper audit will guarantee the previous Treasurer maintained the books correctly and the officers of the unit spent all funds within the guidelines of the budget. An audit may also show discrepancies in funding or expenditures and is essential for financial accountability.

Who? Bylaws require an Audit Committee of at least three members to conduct the review. Only members who are not signatories may serve on the committee. The election or appointment is specified in the Bylaws.

When? An audit is done once a year even if the same Treasurer remains in office. It may also be requested anytime one is deemed necessary or whenever the authorized signers on the bank account change. The deadline is on the Audit Report form at the end of this section which is October 27, 2023.

How? The Treasurer turns over all necessary documentation to the Audit Committee. The current and previous Treasurers should be available for questions. The Audit Committee may reference the Audit Committee Helpful Hints and Worksheet to assist. The Treasurer supplies the Audit Committee with a copy of: the last Audit Report; checkbook and bank statements; Expense Forms with receipts; Deposit Forms with deposit slips and bank receipts; Ledger for all line items; financial reports from all meetings; copy of the Annual Report; copies of minutes that would include the adopted budget, as well as any amendments that were approved during the year; copy of the current Bylaws and Standing Rules; and any other information requested.

Procedure: Begin with the records posted after the last audit, which is usually July 1. Check to see if the amount shown on the bank statement corresponds to the starting balance recorded in the checkbook and ledger. Verify that bank reconciliations were done monthly. Reconcile each month's bank statement. Make sure that every check written is substantiated with an Expense Form and receipt. Verify that all purchases have two signatures. Check to see that checks are not being signed by the individual to whom they are made payable. Verify that all income and expenditures are allocated into the approved budget. Make certain that state and national portions of the membership dues were paid to LAPTA. Reconcile each deposit slip with bank statement and checkbook entries. Check the math for the totals. Check each month's ledger entries for error, and crosscheck against checks issued and receipts posted. Check the Treasurer's reports and for accuracy. Verify that the reports are true representations of the transactions recorded.

Audit Report

The Audit Committee fills out the Audit Report Form at the end of this section. The report indicates the information needed and errors committed. The Audit Report must be officially adopted by the PTA and must be included in a completed Annual Report covering the PTA's fiscal year. If the validity of an Audit Report is questioned, contact Louisiana PTA or an independent CPA. Louisiana PTA is always available for assistance.

RAISING MONEY

Most PTAs need to raise funds to provide programs and services throughout the year; however, fundraising efforts should not be the primary emphasis for PTAs. Fundraising efforts should be in response to supporting approved PTA work. To help ensure proper alignment with the PTA purposes, LAPTA recommends that PTAs engage in **three programs or service projects for each fundraiser activity hosted**.

There are many different methods to raise funds, and PTAs will be approached by numerous external groups that offer products and services. It is important that PTA leaders evaluate these opportunities carefully and consider all legal and community-related implications. When using a fundraising company, protect the PTA by having all information in writing. A contract protects the PTA and the fundraising company. With a contractual agreement, all parties assume responsibility for complying with the terms, but the PTA also begins with a clear understanding of who oversees what. Make sure the contract is between the two organizations and not *individuals*. Contracts are only signed by the President with Executive Board approval, and the signer adds their title after their name to show they are signing for the PTA. When reviewing the contract, look for cost and profit percentages, list of approved promotional materials, desired services, dates for delivery and payment, and procedure for handling damaged, unsold, or returned merchandise.

ARTICLES OF INCORPORATION

Louisiana law requires that all non-profits register annually with the Louisiana Secretary of State. The PTA must file the Annual Report which updates its officers. Visit the Louisiana Secretary of State at geauxbiz.com to renew, set up annual email reminders, update the officers, and pay a \$15 renewal fee. The Articles of Incorporation shall be kept permanently on file and are part of the annual Active Affiliation Report that is submitted to LAPTA. 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.

FEDERAL TAXES

IRS Section 501(c)(3)

The Louisiana PTA and all subordinate units in Active Affiliation are exempt from federal income tax as charitable and educational organizations under the provisions of section 501(c)(3) of the Internal Revenue Code. As such, the subordinates fall under LAPTA’s 501(c)(3) umbrella exemption. Annually, LAPTA is required to submit to the IRS a list of all units in Active Affiliation. Those listed are covered by the LAPTA group exemption. **Any unit not listed would be subject to income tax on all earnings.** If a PTA votes to dissolve, it loses this status and its benefits. To have “**Active Affiliation**,” a unit must submit the required paperwork to LAPTA. See LouisianaPTA.org/activeaffiliation as well as at the form at the end of this section.

Protecting Tax Exemption

As 501(c)(3) organizations, the LAPTA and its Local Units in Active Affiliation may solicit and spend funds without paying income tax to the federal or state governments if they comply with rules governing non-profit organizations and all income is directly related to the purposes of the organization. To maintain its 501(c)(3) status, a PTA must meet specific standards. The organization must be noncommercial, nonsectarian, and nonpartisan meaning that it does not engage in specific commercial endorsements, is not involved with specific religious groups, and does not endorse or support political candidates or parties. Further, neither the organization’s name nor any member acting in an official capacity can endorse or promote a commercial concern or political party or conduct activities not in keeping with the PTA Purposes and Mission.

Donations

The 501(c)(3) designation means that all contributions to PTAs are deductible as charitable contributions for federal income tax purposes. If a donor requests verification that a PTA is a 501(c)(3) charitable organization, email the LAPTA office at office@LouisianaPTA.org to obtain an official Validation Letter. PTAs must be prepared to issue receipts to donors whose contributions exceed \$250/day. Cancelled checks are no longer sufficient. There is no required format for the receipt, but it must include the PTA's name, donor's name, date, and cash amount received or a description of the property received.

PTAs must inform prospective donors about the extent to which their contributions are tax deductible. This disclosure should indicate the fair market value of any tangible benefit received in exchange for a contribution and the amount of the donation that is deductible as a charitable contribution. For example, if a Spaghetti Dinner ticket sells for \$20 and the value of the meal is determined to be \$5, the purchaser is entitled to a \$15 charitable contribution. The \$5 is not necessarily the PTA's cost but the value of the meal allowing for a profit.

PTA volunteers may deduct out of pocket expenses while volunteering for the PTA. These include mileage for travel to and from volunteer sites; costs not reimbursed relating to volunteer work, such as phone calls; and the costs of childcare incurred to enable a person to volunteer. The value of a person's time is not deductible. For example, Pizza nights are considered donations.

Unrelated Business Income

As a tax-exempt organization, PTA revenues are not subject to federal income tax if the revenue is raised in a manner that is related to the PTA's tax-exempt purpose. However, it is possible for some revenue to be subject to income taxation. When this occurs, the amount subject to taxation falls into the category of Unrelated Business Income (UBI). An activity is classified as UBI if it has all of the following:

- The PTA takes an active role in the generation of income from an activity.
- The activity is conducted on a regular and continuous basis.
- The activity is unrelated to the mission of the PTA. Even if the proceeds are used to further PTA purposes, if the method of raising the funds is unrelated, it is deemed UBI. Fundraising is not a related activity even if all of the net revenue will be used to support PTA programs.

However, if the PTA conducts the activity and provides at least 85% of the labor, the income generally will be excluded from taxation, even if the above three conditions exist. There is no rule that says PTAs must never conduct activities that produce UBI. But, if the unrelated activity is dominant, the PTA may no longer be perceived as a charity supporting itself with some UBI. Instead, it may be viewed by the IRS as a business with some charitable activities. At that point, the PTA would lose its tax-exempt status. IRS regulations require nonprofits to file Form 990-T and pay taxes when gross receipts from unrelated business activities (UBI) are over \$1,000.

IRS Tax Filing Requirements (irs.gov/charities-and-nonprofits) Which 990 Form to File?

- If gross receipts are less than \$50,000, use **Form 990-N**.
- If gross receipts are less than \$200,000 and total assets are less than \$500,000, use **Form 990-EZ**.
- If gross receipts are more than \$200,000 or total assets are more than \$500,000, use **Form 990**.

Tax filing is due every year by the 15th day of the 4th month after the close of the tax year. For example, if the PTA tax year ends on June 30, the deadline is November 15. Taxes cannot be filed until after the tax year ends. If the tax filing is late, the IRS will send a reminder notice to the last address on file. There might be a penalty assessment for filing late. Organizations that fail to file required Forms 990, 990-EZ or 990-N for three consecutive years will automatically lose their tax-exempt status. Revocation of the organization's tax-exempt status will happen on the filing due date of the third consecutively missed year.

Form 990-N must be completed and filed electronically. There is no paper form. Use the Form 990-N Electronic Filing System User guide to avoid most problems. Organizations should continue efforts to file, even if late.

Form 990-N is easy to complete with only 8 items of basic information: the EIN, tax year, legal name, mailing address, any other names the organization uses, name and address of a principal officer, website address if one exists, confirmation that the organization's annual gross receipts are \$50,000 or less, and, if applicable, a statement that the organization has terminated. Form 990-EZ and Form 990 are more complex.

Form 1099-Miscellaneous

A PTA is required to file Form 1099-MISC if it paid \$600 or more during a calendar year to a business or person for services rendered. Examples include a guest speaker or artist-in-residence. A copy must be sent to the recipient by February 2 of the year following the payment and a copy must be sent to the IRS by March 1. Form 1099 is not required for scholarship recipients regardless of the amount paid. Scholarship winners are required to spend their proceeds on tuition or other required school expenses or else they must report the proceeds as personal income.

STATE SALES TAXES

Units are required to pay state and local sales taxes on every purchase. They are also to collect and remit sales tax on items sold unless an exemption has been granted by the state. LAPTA is currently working to acquire this exemption, but it is not currently granted. Many PTAs wrongly assume that since public schools are exempt from paying sales taxes and have a sales tax exemption number from the state, PTAs are also exempt. If a PTA member is asked for a tax number, he is required to inform the salesperson that PTAs are not exempt from sales taxes. Do not use a school's sales tax exemption number to make purchases because this is fraud.

State Sales Tax Exemptions

Units can apply for a sales tax exemption for fundraisers by filing Form R-1048 and submitting it to the Louisiana Department of Revenue no later than two weeks prior to the event. The form can be downloaded from their website, www.rev.state.la.us. The types of fundraisers that are generally granted an exemption include fairs, festivals and admission tickets to dances or performances. Fundraisers that involve an outside promoter or vendor who profits from the event will be denied an exemption. Additionally, fundraisers involving the sale of products that would be in direct competition with local retailers, such as school supplies, wrapping paper, or candy, are not eligible for an exemption. Check with the parish tax collection office to determine the requirements for remitting local taxes.

There are circumstances when PTAs can legally avoid sales taxes when making certain purchases on behalf of schools. If the PTA is purchasing equipment such as computers or copiers, in accordance with the PTA budget, to be provided to the school as a gift, it might benefit the school to purchase it directly and the PTA reimburse the school. There is no sales tax required since the school is buying the items directly. The school then provides an Expense Form to the PTA with a copy of the invoice. The PTA Treasurer can issue a check to the school reimbursing it for the purchase. In this manner, the PTA has funded the purchase of items, but since the school purchased it, no sales taxes are required.

Paying Sales Taxes

If a PTA was denied an exemption or chose not to file for an exemption, it must apply for a Louisiana Tax Number with the Department of Revenue. Download the form from www.rev.state.la.us. Be sure to add that the PTA will have "irregular sales." The unit will then only have to file and pay taxes when items are sold.

Sales taxes are due by the 20th day of the month following the sale. For example, if a fundraiser is held in October, taxes are due by November 20. The sales tax return (R-1029) can also be downloaded from the department's website. PTAs are not obligated to remit sales tax if the fundraising company remits them to the state. Make sure the PTA receives a copy of the invoice for the records indicating that taxes were paid to the vendor. Out of state companies without a sales representative in Louisiana are not obligated to collect or remit sales taxes. It is the PTAs responsibility to collect and remit the taxes on all items purchased or sold.

GIFTS TO SCHOOLS

PTAs can only give money to schools that is allocated for a designated purpose. Often, schools can purchase items at a significant discount, or a unit may decide to fund a portion of the school's purchase. When a unit decides to have the school make a purchase, the General Membership must first approve the gift to be made and its purpose. The donation must specify the designated purpose agreed to in writing between the PTA and the school official. The agreement states the nature of the item purchased, the way it is to be used, and when it will be procured. It should also include that the school will furnish a copy of the invoice to the PTA, and that all funds will be returned to the PTA if the item is not purchased or the terms are not met. **See sample donation forms at the end of this section.**

Each PTA wants to ensure that its supported school can purchase items that will improve the quality of education. PTAs shall not give money to a school for purchases without receiving appropriate documentation. A PTA can directly purchase items for a school with a PTA check and then donate them. In this situation, the PTA receives the receipt directly.

A second method is for schools to purchase items and then receive reimbursement from the PTA. In this situation, the school follows procedures set by the school system, and the PTA must also get acceptable documentation. The Treasurer issues a check to the school for the purchase amount. When the item arrives, the school pays the invoice and provides a copy of the invoice to the PTA. If the invoice is less than the amount provided, the school shall reimburse the PTA for excess funds. If the amount due is more than provided, the principal should give the PTA a new Expense Form and attach a new copy of the invoice.

REPORTS

Robert's Rules of Order, Revised Edition specifies that the Treasurer is responsible for making regular budget and activity reports whenever there is an Executive Committee, Board of Directors, or a General Membership meeting. Sample reports are at the end of this section.

Activity Report: There is no set format for the Activity Report, but it should include the date, the current balance, total of expenses and income, and the previous balance from the last report. Depending on the size and composition of the membership, the Treasurer might need to provide more information, such as a list of all checks written since the previous report and all deposits made since the last report including their source.

Budget Comparison Report: The Budget Comparison Report consists of a copy of the budget with three additional columns, an "actual expense," "actual income," and a "remaining or variance" column which shows how much the PTA is under or over in each category. This format provides a detailed analysis of exactly how the PTA's actual income and expenses compare to the approved budget and indicates if there is a problem in any category. Unless provisions are made otherwise in the Bylaws or when the budget is approved, no budget expense item may be exceeded without authorization from the PTA General Membership.

Distribution: Copies of the reports are distributed to the members in attendance when possible. For a General Membership meeting, it may be posted on a bulletin board or on paper copies. The reports are filed for the audit committee. They do not need a motion to be accepted. The Secretary keeps a copy with the minutes.

Annual Report: At the close of a unit's fiscal year, the Treasurer prepares an Annual Report. The Treasurer makes a preliminary report to the membership at the annual meeting. This report is for information only and is not officially adopted. The report becomes official after the Audit Report is adopted by the membership. Normally, this takes place at the first business meeting of the new fiscal year. The Treasurer's Annual Report and the Audit Report are filed with the permanent financial records after the adoption of the Audit Report.

RECORD KEEPING & RETENTION

Set up a written or electronic ledger to record all financial transactions. LAPTA recommends the use of an online accounting platform such as MoneyMinder.com or WaveApps.com. Once the approved budget is added to the account, enter all deposits and expenses with the appropriate budget item.

When using either written or computerized accounting, regular financial reports are required. The actual versus budget comparison reports must be produced for every Executive Committee, Board of Directors, and General Membership meeting. Each report generated must show the title and date. MoneyMinder has an edit box to add a title and date. Make copies of the files on a regular basis, preferably any time that the records are modified but at no greater interval than one month. Store at least one set of backup records away from the Treasurer's computer system such as another officer's home or the school. Keep the PTA financial records on a memory flash drive containing only PTA financial information. The ledger must maintain the running balance in the account. Follow these record retention guidelines:

Permanent Storage

- Annual financial statements, Audit Reports, check ledger, and documents evidencing gifts
- Articles of Incorporation
- Current Bylaws and amendments
- Minutes
- Correspondence to state & federal agencies
- Licenses and Permits
- Employer Identification Number (EIN)
- Legal correspondence
- Insurance Claims Records

10 Year Storage

- Personnel Records
- Employee Contracts
- Personal Property Leases

7 Year Storage

- Accounts payable and accounts receivable
- Bank statements, deposit slips
- Business expense reports
- Interim financial statements
- Grant records
- Cash receipts
- Contracts

3 Year Storage

- Hard copy correspondence and internal memoranda
- Bank reconciliation reports

1 Year Storage

- Routine emails

ADDITIONAL RESOURCES

The National PTA “*Local PTA Leader Kit*” has a finance section that has a wealth of information. Create an account at **PTA.org** to access other resources such as E-Learning courses. National PTA has gathered several articles relating to basic financial management to help effectively run a PTA and fulfill the goals while maintaining fiscal responsibility. Refer to the LAPTA site at **LouisianaPTA.org/treasurer** for up-to-date information, forms, and training. Contact the LAPTA Treasurer at Treasurer@LouisianaPTA.org with any questions.

The Internal Revenue Service website is **IRS.gov**. The “charities and non-profits” section is especially helpful to PTAs and allows downloading of forms and instructions as well as informational brochures. One of the most useful is Publication 4221, “Compliance Guide for 501(c)(3) Tax-Exempt Organizations” which addresses records, what should be kept, and for how long.

ACTIVE AFFILIATION REPORT ***VERY IMPORTANT***

Each membership year, local PTAs must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have “Active Affiliation” means that the Local PTA Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes nine items and are submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTA Units who do not maintain Active Affiliation will be subject to the Retention Plan. Deadline to submit the files is **October 27, 2023**.

DUE OCTOBER 27, 2023

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



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

RETENTION PLAN

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

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

TREASURER'S OVERVIEW

Use this checklist throughout the year to double check the financial management practices of the PTA.

- Turn over meeting held with outgoing Treasurer. Date: _____
- Signature cards on file with the bank. Date: _____
- Budget Committee formed. Date: _____
- Proposed budget presented to Board for consideration. Date: _____
- Proposed budget presented to General Membership & approved. Date: _____
- Budget Approval Form and budget submitted to LAPTA. Date: _____
- Gather documentation for the Active Affiliation Report. Date Submitted: _____
- Budget amendments approved by General Membership on: Date: _____
- Date: _____ Date: _____ Date: _____
- The bookkeeping method is _____. Any login passwords and accounts are _____.
- Expense and Deposit Forms copied and distributed to the Board of Directors.
- Treasurer and President develop a workable reimbursement system. Emphasize that only budget approved expenses will be reimbursed and only with receipts/invoices attached. Date shared with Board: _____
- Enter and file Expense and Deposit Forms on an ongoing basis.
- The bank statement is opened and signed by someone who is not an authorized signer on the bank account. Treasurer and President review bank statements and financial status monthly.
- Activity and Budget Comparison Reports given at all Board of Director and General Membership meetings. List the date and type of meeting. _____
- Books closed and annual report prepared. Date: _____
- Audit Committee chosen for past school year. Date: _____

Auditors: _____

Auditors: _____

Auditors: _____



BUDGET APPROVAL FORM

Deadline to submit to LAPTA: October 27, 2023

This form is required to maintain a Local PTA Unit's Active Affiliation with LAPTA and National PTA. It should be submitted annually by **October 27, 2023**. See LouisianaPTA.org/activeaffiliation for other required items.

Local Unit Name

Local Unit Parish

Local Unit LUR#

School Name

The PTA's budget for the _____ fiscal year was approved at the General Membership meeting held on _____.

Attached is the Approved Budget.

President's Signature

Treasurer's Signature

President's Name

Treasurer's Name



SAMPLE BUDGET XYZ PTSA

July 1, 2022 – June 30, 2023

Fundraising	Budgeted Income	Budgeted Expense	Budget Net
Color Run	\$20,000	-\$10,000	\$10,000
Uniforms	\$15,000	-\$7,500	\$7,500
Shake Days	\$5,000	-\$2,000	\$3,000
Grants	\$2,000	\$0	\$2,000
Donations	\$750	\$0	\$750
Fundraising Totals	\$42,750	-\$19,500	\$23,250
Student & Parent Programs	Budgeted Income	Budgeted Expenses	Budget Net
Reflections Program	\$0	-\$100	-\$100
Breakfast of Champions	\$0	-\$500	-\$500
Talent Show	\$800	-\$500	\$300
Project Graduation	\$0	-\$1,000	-\$1,000
Health Supplies	\$0	-\$200	-\$200
Mental Health Speaker	\$0	-\$1,000	-\$1,000
Grandparents Bingo	\$200	-\$1,500	-\$1,300
Welcome Packets	\$0	-\$250	-\$250
Newsletter	\$0	-\$250	-\$250
Hospitality	\$0	-\$250	-\$250
Student & Parent Programs Totals	\$1,000	-\$5,550	-\$4,550
Teacher, School & Community	Budgeted Income	Budgeted Expenses	Budget Net
Staff Welcome Lunch	\$0	-\$1,500	-\$1,500
Staff Snack Days	\$0	-\$400	-\$400
Teacher Spirit Cart	\$0	-\$400	-\$400
Staff Appreciation Week	\$0	-\$1,000	-\$1,000
Library Literacy Program	\$0	-\$2,500	-\$2,500
Beautification	\$0	-\$1,000	-\$1,000
School Technology	\$0	-\$7,500	-\$7,500
Teacher Mini Grants	\$0	-\$3,000	-\$3,000
Adopt-a-PTA	\$0	-\$1,000	-\$1,000
Teacher, School & Community Totals	\$0	-\$18,300	-\$18,300
Administrative	Budgeted Income	Budgeted Expenses	Budget Net
AIM Insurance	\$0	-\$500	-\$500
Banking Fees & Interest	\$50	-\$100	-\$50
Leadership & Training	\$0	-\$500	-\$500
*Membership Dues	\$2,200	-\$1,250	\$950
PTA Office Supplies	\$0	-\$1,000	-\$1,000
Start Up Funds	\$5,000	-\$5,000	\$0
Carry Forward & Ending Balances	\$12,978	-\$12,090	\$888
Zoom	\$0	-\$188	-\$188
Administrative Totals	\$20,228	-\$20,628	-\$400
Grand Totals	\$63,978	-\$63,978	\$0

*Total income reported on the IRS tax filings for Membership Dues is the net amount, excluding the Louisiana PTA and National PTA dues portions.

SAMPLE COMPARISON BUDGET XYZ PTSA

May 22, 2023

Fundraising	Actual Income	Budgeted Income	Actual Expense	Budgeted Expense	Actual Net	Budget Net	More/- Less
Color Run	\$18,977	\$20,000	-\$8,498	-\$10,000	\$10,479	\$10,000	\$479
Uniforms	\$12,320	\$15,000	-\$6,349	-\$7,500	\$5,971	\$7,500	-\$1,529
Shake Days	\$3,589	\$5,000	-\$1,850	-\$2,000	\$1,739	\$3,000	-\$1,261
Grants	\$2,000	\$2,000	\$0	\$0	\$2,000	\$2,000	\$0
Donations	\$850	\$750	\$0	\$0	\$850	\$750	\$100
Fundraising Totals	\$37,736	\$42,750	-\$16,697	-\$19,500	\$21,039	\$23,250	-\$2,211
Student & Parent Programs	Actual Income	Budgeted Income	Actual Expense	Budgeted Expense	Actual Net	Budget Net	More/- Less
Reflections Program	\$0	\$0	-\$95	-\$100	\$95	-\$100	-\$5
Breakfast of Champions	\$0	\$0	-\$496	-\$500	\$496	-\$500	-\$4
Talent Show	\$775	\$800	-\$478	-\$500	\$1,253	\$300	\$1,553
Project Graduation	\$0	\$0	-\$1,000	-\$1,000	\$1,000	-\$1,000	\$0
Health Supplies	\$0	\$0	-\$182	-\$200	\$182	-\$200	-\$18
Mental Health Speaker	\$0	\$0	-\$1,000	-\$1,000	\$1,000	-\$1,000	\$0
Grandparents Bingo	\$210	\$200	-\$1,488	-\$1,500	\$1,698	-\$1,300	\$398
Welcome Packets	\$0	\$0	-\$250	-\$250	\$250	-\$250	\$0
Newsletter	\$0	\$0	-\$250	-\$250	\$250	-\$250	\$0
Hospitality	\$175	\$0	-\$249	-\$250	\$424	-\$250	\$174
Student & Parent Programs Totals	\$1,160	\$1,000	-\$5,488	-\$5,550	\$6,648	-\$4,550	\$2,098
Teacher, School & Community	Actual Income	Budgeted Income	Actual Expense	Budgeted Expense	Actual Net	Budget Net	More/- Less
Staff Welcome Lunch	\$0	\$0	-\$1,483	-\$1,500	-\$1,483	-\$1,500	\$17
Staff Snack Days	\$0	\$0	-\$389	-\$400	-\$389	-\$400	\$11
Teacher Spirit Cart	\$0	\$0	-\$400	-\$400	-\$400	-\$400	\$0
Staff Appreciation Week	\$0	\$0	-\$939	-\$1,000	-\$939	-\$1,000	\$61
Library Literacy Program	\$500	\$0	-\$2,500	-\$2,500	-\$2,000	-\$2,500	\$500
Beautification	\$0	\$0	-\$1,000	-\$1,000	-\$1,000	-\$1,000	\$0
School Technology	\$0	\$0	-\$7,410	-\$7,500	-\$7,410	-\$7,500	\$90
Teacher Mini Grants	\$0	\$0	-\$2,200	-\$3,000	-\$2,200	-\$3,000	\$800
Adopt-a-PTA	\$0	\$0	-\$1,000	-\$1,000	-\$1,000	-\$1,000	\$0
Teacher, School & Community Totals	\$500	\$0	-\$17,321	-\$18,300	-\$16,821	-\$18,300	\$1,479
Administrative	Actual Income	Budgeted Income	Actual Expense	Budgeted Expense	Actual Net	Budget Net	More/- Less
AIM Insurance	\$0	\$0	-\$488	-\$500	-\$488	-\$500	\$12
Banking Fees & Interest	\$22	\$50	-\$78	-\$100	-\$56	-\$50	-\$6
Leadership & Training	\$0	\$0	-\$325	-\$500	-\$325	-\$500	\$175
Membership Dues	\$2,390	\$2,200	-\$837	-\$1,250	\$1,554	\$950	\$604
PTSA Office Supplies	\$0	\$0	-\$212	-\$250	-\$212	-\$250	\$38
Start Up Funds	\$0	\$5,000	\$0	-\$5,000	\$0	\$0	\$0
Carry Forward & Ending Balances	\$12,978	\$12,978	-\$12,090	-\$12,840	\$888	\$138	\$750
Zoom	\$0	\$0	-\$188	-\$188	-\$188	-\$188	\$0
Administrative Totals	\$15,390	\$20,228	-\$14,218	-\$20,628	\$1,173	-\$400	\$1,573
Grand Totals	\$54,786	\$63,978	-\$53,724	-\$63,978	\$12,039	\$0	\$2,939

*Total income reported on the IRS tax filings for Membership Dues is the net amount, excluding the Louisiana PTA and National PTA dues portions.

YEAR-END FINANCIAL CHECKLIST

Preparing the Treasurer's Binder

- Passwords & Accounts:** Have all accounts and current passwords typed in the front of the binder. Include the LUR (Local Unit Registration number), EIN, and the official Local Unit name on the tax filing. Include login information for email accounts, geauxbiz.com (and annual renewal date), IRS tax filing, and other accounts like AIM insurance (and annual renewal date), CheddarUp.com, SquareUp.com (credit card payments), Zoom, websites, and Treasurer software like MoneyMinder.com. Include current Board Roster. Sample summary page is at the end of this section. The President, Treasurer, and Secretary shall have a copy of the Passwords & Accounts Summary.
- Expenses:** All expenses must have receipts and Expense Forms signed by two authorized people. Pay any outstanding bills. Enter all expenses into accounting software. Submit all LAPTA and National PTA dues.
- Deposits:** All Deposit Forms with cash require two signatures. Contact anyone with bounced checks to get it paid. Transfer money from any online or credit card accounts like CheddarUp.com, etc. Enter all deposits into accounting software.
- Bank Statements:** Include all bank statements for the fiscal year. Every statement needs to be signed by someone who is *not* a check signer. Reconcile the bank account to the current month. Print reconciliation reports. MoneyMinder.com is a great online accounting platform, or Waveapps.com is a free alternative.
- Budget & Agendas:** Include monthly budgets and meeting agendas in the binder. Prepare and print the final year-end budget including every transaction for each budget category. In the financial software such as MoneyMinder.com, create the new year and draft a preliminary budget.
- Charter Info:** Include a copy of the taxes in the binder. Print out the approval email, or other proof that the taxes were filed. Include a copy of the insurance policy and Secretary of State (geauxbiz.com) registry. Include the previous year's Audit Report, Bylaws, and Standing Rules.
- Bank Signers:** If there are new people signing on the account for the next year, contact the bank about who needs to be present to update signers. Some banks want both the old and the new people present, plus paperwork such as the meeting minutes from the elections. Most terms end on June 30.
- Checks & Debit Cards:** Have the checks, ledger or register, and any debit cards together. Destroy debit cards for those who will not be authorized to use the account next year. The new Board may request new debit cards issued with the PTA name and the name of authorized officers.
- Meeting:** Meet with the Incoming Treasurer and President to turn over all financial records. Answer all questions and explain all financial matters. Assist as needed with the Audit Committee.

Contact the Louisiana PTA Treasurer with any questions at Treasurer@LouisianaPTA.org.

DEPOSIT FORM

	Name	Date
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____
6.	_____	_____
7.	_____	_____
8.	_____	_____
9.	_____	_____
10.	_____	_____
11.	_____	_____
12.	_____	_____
13.	_____	_____
14.	_____	_____
15.	_____	_____
16.	_____	_____
17.	_____	_____
18.	_____	_____
19.	_____	_____
20.	_____	_____
21.	_____	_____
22.	_____	_____
23.	_____	_____
24.	_____	_____
25.	_____	_____
26.	_____	_____

Cash Summary:

\$1 X _____ = _____

\$2 X _____ = _____

\$5 X _____ = _____

\$10 X _____ = _____

\$20 X _____ = _____

\$50 X _____ = _____

\$100 X _____ = _____

TOTAL = _____

Coin Summary:

1¢ X _____ = _____

5¢ X _____ = _____

10¢ X _____ = _____

25¢ X _____ = _____

50¢ X _____ = _____

1.00¢ X _____ = _____

TOTAL = _____

Total # of Checks: _____
Count the actual checks to catch any overlooked checks.

Deposit Totals

Checks: \$ _____

Cash: \$ _____

Coins: \$ _____

Total: \$ _____

Budget Items to be Credited	\$ Amount
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Executive Board Member Signature

Second Signature for Cash Deposits

For Treasurer's Use Only

Dep Date: _____ Amount: _____

Entered into Ledger/Accounting Software

EXPENSE FORM

_____ \$ _____
 Date Total Amount

Requested by: _____

Attach all receipts to the **back**
 on this side of the page

Choose One:

Debit Card Purchase (Do not reimburse)

OR

Check Payable to: _____

Itemized Expenses: Itemize each receipt with amount, business name, and budget line item or purpose/use.

<i>Amount</i>	<i>Receipt's Store Name</i>	<i>Budget Line Item</i>
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Budget Line Item Totals: Note the total amount for each budget line item from the above expenses.

<i>Amount</i>	<i>Budget Line Item</i>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Grand Total for Expense: _____

Deliver check to: _____

Mail Check to: _____

Certification: The expenses listed are authorized PTA expenses.

 Signature Date

 Signature Date

FOR TREASURER'S USE ONLY

_____	\$	_____
Date Disbursed	Check #	Amount

Note

Receipts Attached

Entered in Accounting Software/Ledger

BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA Units are required to review and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template are required. Visit LouisianaPTA.org/bylaws for details. Bylaws not in compliance will be returned to the Local PTA Unit for revisions. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments to Bylaws@LouisianaPTA.org. Please allow 30 days for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the approved Bylaws or amendments to the President's email.

Local Unit Name

Local Unit Parish

Local Unit LUR#

President's Email

President's Phone

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

Choose one.

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

Choose all that apply.

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

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

President's Signature

Secretary's Signature

President's Name

Secretary's Name

Email the completed Bylaws Approval Form and Bylaws template (if applicable) to Bylaws@LouisianaPTA.org in PDF format. Allow 30 days for LAPTA to approve and return the final approved document to the President's email.

Contact Bylaws@LouisianaPTA.org with any questions.



AUDIT REPORT

Local Unit Name	Parish	IRS EIN
LUR#	IRS EIN	FISCAL YEAR

Dates covered by this audit Day 1 _____ to last day _____
 Check numbers reviewed by this audit _____ to _____

Ledger Reconciliation

Balance on hand on day 1 of audit year	Date _____	1. \$	_____
Total deposits for audit year		2. \$	_____
	TOTAL (add lines 1 & 2)	3. \$	_____
Total expenses with receipts of audit year		4. \$	_____
Balance on hand on last day of audit year	TOTAL (line 3 minus line 4)	5. \$	_____

Bank Reconciliation

Bank statement day 1 start balance	Day 1 Date _____	6. \$	_____
All credits on 12 bank statements		7. \$	_____
Deposits not yet credited (_____)		8. \$	_____
	TOTAL (add lines 6, 7 & 8)	9. \$	_____
Total withdrawals on 12 bank statements		10. \$	_____
Total uncleared checks (_____)		11. \$	_____
	TOTAL (line 9 minus lines 10 & 11)	12. \$	_____

Line 5 must equal line 12.

The Audit Committee examined the financial records of the Treasurer at _____
 _____ PTA/PTSA and find them (check one):

- Correct.
- Substantially correct with the attached recommendations and findings.
- Partially correct. More adequate accounting procedures need to be followed so that a more thorough Audit Report can be given.
- Incorrect. Attach a separate report of explanation and recommendations to Executive Board.

*A separate Audit Report must be completed for each bank account.

Date Audit completed _____
 Auditor's Name, Email, Phone _____
 Auditor's Name, Email, Phone _____
 Auditor's Name, Email, Phone _____

AUDIT PROCEDURES & HINTS

Supplies

For the audit, the committee members (as determined by the Bylaws) will need the checkbook, binder with current fiscal year invoices of Expense Forms and Deposit Forms, all bank statements for the fiscal year, and a copy of the previous year's audit.

- Committee person #1 reviews the bank statements for the fiscal year.
- Committee person #2 reviews the checkbook or accounting software file for the fiscal year.
- Committee person #3 reviews all expenses and Expense Forms for the fiscal year.

Each committee member oversees one part of the financials to review. The Treasurer may not participate in audit except to answer questions if necessary.

Instructions

- 1) Start with previous year's audit to verify beginning of year balance. Check this against the checking account balance from that time.
- 2) Next, verify each check written and each deposit made against the checkbook and bank statement for each month. Committee member #3 will verify the signed Expense Forms and receipt for all checks written and deposits made.
- 3) Keep a list of outstanding checks and deposits and check them off as you go through each month.
- 4) At the end of the fiscal year, record all outstanding deposits (line 8) and expenses (line 11).
- 5) Write the ending balance, which should be the same amount listed on the Audit Report line 5.
- 6) Complete the Audit Report by inserting the appropriate figures in each blank.
- 7) All committee members must sign the form stating that the PTA books were complete or incomplete.
- 8) If not complete, please seek advice from the LAPTA Treasurer.

Directions by Line Number

Line 1: Date of last audit (which should be the first day of the audit year) and dollar amount on hand.

Line 2: Total amount of all deposits in ledger or financial software for the entire audit year.

Line 3: Add line 1 and line 2 to get the total dollar amount.

Line 4: Total amount of all expenses with receipts in ledger or financial software for the entire audit year.

Line 5: To get the ending balance on hand for the audit year, subtract line 4 from line 3.

Line 6: Write the date and starting balance on the bank statement on day 1 of the audit year.

Line 7: Write the sum of all credits on the 12 bank statements for the audit year.

Line 8: Write the sum of any deposits not credited to the account on the bank statements.

Line 9: Write the sum of lines 6, 7 and 8.

Line 10: Write the sum of all withdrawals on the 12 bank statements for the audit year.

Line 11: Write the sum of any withdrawals not posted to the account on the bank statements.

Line 12: Subtract lines 10 and 11 from line 9.

Line 5 and line 12 should be the same amount.

AUDIT WORKSHEET



Complete as needed to assist with the audit.

DEPOSITS

Deposits from _____ to _____ \$ _____
Day 1 Day 365 Sum of deposits
 (Line 7 of Audit Report)

Enter the total deposit amount per month listed on the bank statements.

Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____

Deposits Not Cleared: (Line 8 of Audit Report)

Date: _____	Amount: _____	Date: _____	Amount: _____	Date: _____	Amount: _____
Date: _____	Amount: _____	Date: _____	Amount: _____	Date: _____	Amount: _____
Date: _____	Amount: _____	Date: _____	Amount: _____	Date: _____	Amount: _____
Date: _____	Amount: _____	Date: _____	Amount: _____	Date: _____	Amount: _____

EXPENSES

Disbursements from _____ to _____ \$ _____
Day 1 Day 365 Sum of withdrawals
 (Line 10 of Audit Report)

Enter the total withdrawal amount per month listed on the bank statements.

Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____
Month _____	Amount _____	Month _____	Amount _____

Checks Not Cleared: (Line 11 of Audit report)

Ch #: _____	Amount: _____	Ch #: _____	Amount: _____	Ch #: _____	Amount: _____
Ch #: _____	Amount: _____	Ch #: _____	Amount: _____	Ch #: _____	Amount: _____
Ch #: _____	Amount: _____	Ch #: _____	Amount: _____	Ch #: _____	Amount: _____
Ch #: _____	Amount: _____	Ch #: _____	Amount: _____	Ch #: _____	Amount: _____

SAMPLE NSF LETTER

Returned Check Due to Non-Sufficient Funds

Current Date

Name of Check Writer
Address of Check Writer
City, ST Zip

RE: Check returned for not sufficient funds Check # 456
Check Issued Date
Tickets for the Fall Festival

Dear Check Writer,

The ABC PTA received notice on October 12, 2024, that the check written for Fall Festival tickets totaling \$55.00 was returned to us due to insufficient funds in the account. Over the past thirty days, we have been in contact with you and the bank in an attempt to collect the amount owed for the tickets. A detailed log of contacts and actions is below.

An immediate **cash** payment of \$90.00 is required at this time. This includes the original amount of the check and three returned check fees from the bank. Please see totals below.

Check #456	\$55.00
Bank return fee	\$15.00
Bank return fee	\$15.00
Bank return fee	\$15.00
Total.....	\$90.00

Please remit the cash to the school by Friday, November 17, 2024, at 2:30 pm.

Failure to repay this debt will result in the matter being turned over to a collection agency or other legal action to ensure payment.

Sincerely,

Treasurer Name,
ABC PTA Treasurer

President Name,
ABC PTA President

(Copies should be sent to the principal and President or manager of the bank.)

PASSWORDS & ACCOUNTS SUMMARY

ABC PTSA Passwords & Accounts 2022-2023

PTA LUR#: 9999

IRS EIN# 99-9999999

Monthly/Annual Renewal Required for the Following:

GeauxBiz.com: login email & password

LA Charter #: 999999 ; NAKS #: 999999

IRS.gov for 990N: login username & password; email & phone associated with account; other security question answers; Note where to file 990: irs.gov - File - charity & nonprofits – finding filing forms – Form 990 series returns – Form 990 N – submit form 990; or **Efile.form990.org**: name, login ID #, password

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

Moneyfinder.com: email & password

CheddarUp.com: email & password; ABCPTSA.CeddarUp.com; phone; backup security code

SquareUp.com: email & password

Zoom: email & password

Mailchimp.com: email & password

Other Accounting Software: password

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

Bank: screenname, email & password; routing # 99999999, acct # 99999999

Email Accounts: (This might only be held by the President.)

email & password; phone associated with account; backup email

email & password; phone associated with account; backup email

email & password; phone associated with account; backup email

Closed Accounts' Previous Login Information:

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

PTA Leader Toolkit

2023 – 24

Section 4: Secretary

LouisianaPTA.org/secretary



LouisianaPTA.org

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IMPORTANCE OF THE SECRETARY

The Secretary is a particularly critical position on a Local PTA Board and one of only two positions that are required by law as an organization in Louisiana (Secretary and President). The PTA Secretary is responsible for keeping accurate records of the proceedings of the PTA, maintaining complete records of members and leaders, and sending communications on behalf of the Board. The records the Secretary maintains will be the history of the PTA.

Never say, “I’m just the Secretary”! An effective Secretary should be prompt, accurate, and dependable, and have a thorough knowledge of the PTA purposes, Bylaws, Standing Rules, policies, and methods. This guide details the responsibilities of an effective Secretary.

LAPTA CALENDAR & IMPORTANT DATES

July 2023

- July 1 Board position terms begin
- July 15 Submit officer data at LouisianaPTA.org/register

August 2023

- August 1 Submit officer data at LouisianaPTA.org/register
- August 15 Reflections Program opens
- August 12 Start working on Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.
- August 19 LAPTA Leadership Training South for southern Local PTA Units
- August 25 Submit new membership dues at LouisianaPTA.org/membership
- August 26 LAPTA Leadership Training North
- August 30 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm

September 2023

- September 1 Review PTA.org and *LAPTA ToolKit: Grants* for available grants and their deadlines
- September 5 Healthy Minds Zoom Training at 12:00 noon and 7:00 pm
- September 6 Reflections Q&A Zoom Meeting at 12:00 noon and 7:00 pm
- September 11 Affiliation Requirements Zoom Training at 12:00 noon and 7:00 pm
- September 12 Programs & Grants Zoom Training at 12:00 noon and 7:00 pm
- September 13 Secretary Zoom Training at 12:00 noon and 7:00 pm
- September 14 Membership Zoom Training at 11:00 am and 6:00 pm
- September 14 Presidents & VPs Zoom Training at 12:00 noon and 7:00 pm
- September 16 Treasurer Zoom Training at 12:00 noon
- September 19 Diversity & Inclusion Zoom Training at 12:00 noon and 7:00 pm
- September 21 Developing Your Leaders Zoom Training at 12:00 noon and 7:00 pm
- September 25 Submit new membership dues at LouisianaPTA.org/membership

October 2023

- October 1 Deadline for National PTA.org School of Excellence submissions
- October 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- October 14 Statewide Election Day – Advocate for all children by voting
- October 20 Red Ribbon Poster Contest Deadline to Submit to LAPTA
- October 23–31 National Red Ribbon Week
- October 25 Submit new membership dues at LouisianaPTA.org/membership
- October 27 Deadline for Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.**
- October 30 LAPTA Red Ribbon Poster Contest Winners Announced

November 2023

- November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
- November 15 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- November 17 LAPTA Literacy Grant Deadline (<https://form.jotform.com/221748002230038>)
- November 17 Reflections Theme Contest Submission Deadline <https://form.jotform.com/221745830340147>
- November 18 Statewide Election Day – Advocate for all children by voting
- November 25 Submit new membership dues at LouisianaPTA.org/membership
- November 30 LAPTA Reflections Theme Search Winners announced

December 2023

- December 1 LAPTA Literacy Grant Winners Announced
- December 5 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- December 20 Submit new membership dues at LouisianaPTA.org/membership

January 2024

- January 22 Reflections Submission Deadline to LAPTA
- January 25 Submit new membership dues at LouisianaPTA.org/membership

February 2024

- February 9 Louisiana PTA's 100th Birthday
- February 13 Mardi Gras Day
- February 17 National PTA Founders' Day
- February 28 Submit new membership dues at LouisianaPTA.org/membership

March 2024

- March 1 LAPTA Reflections Program LAPTA winners announced
- March 1 LAPTA Day of Service Grant application deadline at LouisianaPTA.org/grants
- March 1 Newsletter Award application deadline at LouisianaPTA.org/awards
- March 1 Advocacy Award application deadline at LouisianaPTA.org/awards
- March 2 Read Across America Day (nea.org)
- March 22 Deadline for Volunteer of the Year Award and Mentor-a-PTA Award
- March 25 Submit new membership dues at LouisianaPTA.org/membership
- March 27 LAPTA Healthy Minds Grant Application Deadline at LouisianaPTA.org/grants
- March TBA National PTA Legislative Convention (LegCon)

April 2024

- April Transition Time and Planning for the Year Ahead
- April 1 Deadline for Creative Teacher Grants at LouisianaPTA.org/grants
- April 1 Deadline for membership reports for LAPTA Annual Membership Awards
- April 20 LAPTA Recognition Ceremony and State Meeting; Winners announced for Day of Service Grants, Creative Teacher Grants, Volunteer of the Year, and Outstanding Newsletter Awards
- April 25 Submit new membership dues at LouisianaPTA.org/membership
- April 28 Submit officer data at LouisianaPTA.org/register

May 2024

- May Transition Time and Planning for the Year Ahead
- May 1 LAPTA Healthy Minds Grant Winners Announced
- May 6-10 Teacher Appreciation Week
- May 25 Submit new officer data at LouisianaPTA.org/register
- May 25 Submit new membership dues at LouisianaPTA.org/membership

June 2024

- June 1 Search and publicize Summer Learning Programs at PTA.org and your local community
- June 25 Submit new officer data at LouisianaPTA.org/register
- June 30 Submit new membership dues at LouisianaPTA.org/membership
- June TBD National PTA Virtual Convention (tentative dates)



RESPONSIBILITIES OF THE SECRETARY

- Register annually as a PTA Leader at LouisianaPTA.org/register.
- Work with the outgoing Secretary to review the responsibilities and the PTA's practices.
- Provide guidance to incoming Board members on best practices for the PTA.
- Sign the Louisiana PTA (LAPTA) Confidentiality, Ethics, and Conflict of Interest Policy. Ensure all Board members signed the PTA Confidentiality, Ethics, and Conflict of Interest Policy.
- Ensure all members of the Board have completed LAPTA Training.
- Review and follow the Records Retention Policy.
- Keep accurate records of the proceedings of the PTA and complete records of members and leaders.
- Send communications on behalf of the Board.
- Participate with full rights of a Board member, make motions, nominate candidates, enter discussions, and vote.
- Prepares order of business, if asked by the President, on all pending matters known in advance.
- Record in the minutes all business transacted at each meeting of the General Membership and Board.
- Sit close to the President and stand to read the minutes or when making the Board report.
- Assist the President in establishing a quorum and maintain a roster record. See a sample Roster Sign-In Sheet at the end of this section.
- Assist in counting a verbal vote when requested by the President.
- Call the meeting to order in the absence of the President and Vice-President(s) and preside until a temporary chair is elected by the membership.
- Prepare a draft of the minutes of a meeting within five days after each meeting for the President.
- Assume the duties of the historian if one is not designated in the Bylaws. Collect and preserve documents relating to the history of the PTA. Present a written report to the membership as the official history to be adopted at the annual meeting (optional).
- Maintain all minutes, records, reports, procedure book, and other pertinent materials.
- Study all references to duties in the PTA Bylaws, policies, and Standing Rules.
- Ensure the local PTA meets all requirements of Active Affiliation with LAPTA. If not, follow up on what is missing. See LouisianaPTA.org/activeaffiliation.
- Keep on permanent file the PTA Employer Identification Number (EIN) as assigned by the IRS.
- Notify Board members, as requested, of all called meetings.
- Present a report of the Board meeting's actions and recommendations at the next meeting.
- Coordinate with the membership chair to report member totals and amount of dues submitted to LAPTA.

Local PTA Units may have one Secretary perform all duties of the office or have a Corresponding Secretary and Recording Secretary share duties. Below are how the duties might be divided.

The Corresponding Secretary

- Manages all correspondence promptly and accurately.
- Writes letters for the President as directed by the Board or PTA.
- Gives information with copies of recommendations, resolutions, motions, and reasons for any action taken.
- Keeps copies of all letters received and replies written.
- Notifies members of their election to office.
- Notifies officers and committee chairs of meetings.
- Reads correspondence aloud, summarized, or passed around for all to read.

Recording Secretary

Prior to each meeting, if requested and at the consultation of the President, prepares a complete agenda. An agenda shows the order in which business should

- come before the group.
- Maintains and retains the roster record for meetings.

- Assists the President in determining if a quorum is present.
- The Recording Secretary should have the following available at all meetings:
 - Minute book (bound journal with numbered pages)
 - Agenda
 - Most current and approved Bylaws and Standing Rules
 - PTA Calendar
 - Minutes of previous meetings
 - List of Standing and Special Committees and their members' names
 - Membership list (A list of Board members is needed for Board meetings. A list of all members is needed for General Membership meetings. The membership list is maintained by the Membership Chair.)
 - Copy of Robert's Rules of Order, Newly Revised, if possible
 - Blank paper for ballots
 - Motion Forms (See end of this section.)
- Calls the meeting to order in the absence of the President and Vice-President, unless the Bylaws state otherwise, and presides until election of a *chair pro tem*.
- Accurately records all business transacted at each meeting of the PTA, which includes General Membership, Board of Directors, and Executive Committee meetings.
- Distributes the appropriate minutes for each meeting type. Board of Director meeting minutes are read and distributed only at Board meetings. General Membership meeting minutes are read and distributed only at General Membership meetings.
- Stands and reads the minutes at all meetings.
- Acts as custodian of all records except those specifically assigned to others.
- Makes minutes and records available upon the request of a member. The records of the Secretary are open for the inspection of any member. However, records must not be released from the custody of the Secretary except upon written order of the President.
- Attends all training offered.
- Perform other delegated duties as assigned such as those of a corresponding Secretary.
- Counts a rising vote when requested by the presiding officer.

HISTORIAN

The position of historian is an optional position. If the PTA does not have a historian, these duties are the responsibility of the Secretary. Check the PTA Bylaws to determine if the PTA has a historian. The PTA may have a tradition that a history book or scrapbook is created to include all activities sponsored by the PTA and includes the Historian Report. This book should be kept in a convenient place such as the school library or office. In this case, the historian is usually a designated position and not the responsibility of the Secretary.

The historian prepares and updates a record of the activities and achievements of the PTA and makes historical facts available on request to the membership. The historian's formal written report is the official history, presented and adopted at the annual membership meeting, and filed with the minutes. It is a summary of all the PTA's activities for that fiscal year. The Historian Report includes:

- A list of the Board members and when they were elected or appointed.
- All Board meeting and membership meeting dates along with any major business conducted by the Board and presented to the membership.
- The programs and activities hosted by the PTA during the year, including a brief description of each training or other events or activities that Board members attended.

MINUTES

The official record of all meetings is referred to as the minutes. They need to be kept forever as the permanent record of the PTA. Because minutes can be used as legal documents in litigation, it is imperative that they be objectively recorded and conscientiously transcribed into a final document. Although it is the responsibility of the Secretary to record, prepare, and preserve the minutes, it is every member's responsibility to read the minutes. Remember, if it is not in the minutes, it did not happen.

Minutes are not a report but a record of the business of the PTA. Minutes protect the PTA and its members. They contain a record of what is done, not what is said. Personal opinions and discussions are not recorded. The minutes contain a record of all actions taken by the group, including the exact wording of every motion, the name of the maker of the motion, and the action taken on the motion. Minutes are written efficiently – complete, concise, and accurate. They must be as brief as possible but include all necessary and accurate information.

The minutes are written legibly in permanent black or blue ink and signed by the Secretary in a **bound journal with numbered pages** to avoid alteration or removal of pages. Minutes specify the date, place, time, type of meeting, and the names and presence of the presiding officer and Secretary or names of their alternates. Then the Secretary follows the agenda, taking notes on information and motions, while excluding personal opinions and discussions. At the close of the meeting, the Secretary signs the minutes.

When taking the minutes of the meeting, have extra pens, the bound journal for minutes, and blank Motion Forms (found at the end of this section). Arrive at the meeting site early to ensure that everything is ready. Have a copy of the agenda, the roster sign-in sheet, any reports, financial statements, or other documents that may be referred to during the meeting. In the absence of the Secretary, a *secretary pro tem* may be elected.

The most difficult part of taking minutes is deciding what information must be written down verbatim, what can be paraphrased, and what is nonessential for the official record. Minutes are meant to be concise, factual, and objective records of what has happened during the meeting. Therefore, do not allow personal preferences to influence notetaking. It can be difficult to discriminate from among all the opinions and facts. Record the proceedings fairly and take a disinterested position. As a recorder, listen carefully and ask the President or Chair for clarification, if needed.

All meetings may be recorded (audio or video) by one Board member, preferably the Secretary, for the purpose of accurately documenting business conducted during the meeting. Everyone present must be told at the start that the meeting will be recorded, and anyone may request to pause the recording during discussion. All recordings are to be destroyed after minutes have been documented.

Courtesy Seat: Only those people listed on the agenda may speak at a meeting. Therefore, a "Courtesy Seat" may be extended to a visiting non-Board member. The minutes would state something like, "**A courtesy seat was extended to** Officer Brown with Louisiana State Police. He spoke about dismissal traffic concerns."

When a **counted vote** occurs, the manner and number of votes for each side should be recorded. The Secretary should be prepared with blank paper for voting by ballot and help count the vote when requested. Reports of officers, standing, and special committees may be attached to the minutes to avoid copying. The Secretary can record a brief statement of activity. Any motions coming from the report must be recorded in the minutes. A sample Tellers Report is in the *LAPTA Toolkit: Elections*.

At the end of a meeting, a motion to adjourn is only necessary if a member wants to adjourn before completing all business.

MOTIONS & ELECTIONS

Motions are statements that describe a proposed action or decision. The process of making motions ensures that all decisions are fairly discussed and voted on. It is necessary to record motions verbatim, as well as the names of the individuals who made them. There is an optional **Motion Form** at the end of this section to assist in recording motions properly. Record the name of the person who made the motion, whether there was a second (no name is needed), the date, the exact verbiage of the motion, verbal or ballot vote, and whether the motion passed or failed. When there are multiple motions in a meeting, keep the motions numbered and in order. If a motion is withdrawn, it is as though it never happened. Only record the final version of a motion.

When typing a motion in the minutes, it shall be indented, in bold, and all caps. Here is an example:

A MOTION WAS MADE by Kaionnia Snow and seconded to create a Nominating Committee of Cindy Allen, Ree Jones, and Tonya Lincoln. A verbal vote was taken. **MOTION PASSED.**

Elections

When writing the minutes for election results, use the following sample template.

No nominations from the floor were submitted. A verbal vote was taken, and the slate of officers was accepted.

The elected Board of Directors for 2024 ABC PTA is:

Abby Lincoln, President
Gina Washington, Vice-President
Kami Adams, Treasurer
Ree Kennedy, Secretary

CONTENT OF MINUTES

- **Heading:** Kind of meeting (General Membership, Board of Directors, Special); PTA name; date; location
- **Call to Order:** by _____(name) at _____(time)
- **Opening:** optional such as stating the PTA Mission and why we PTA; note what it was and by whom
- **Attendance:** Names of members present (usually in Board or Committee meetings with 20 or fewer members) may be included or attach a sign-in sheet; quorum was or was not established.
- **Minutes:** Draft minutes from (date) meeting were read (or distributed or emailed) and approved as read (or approved as corrected) or the reading of the minutes was waived and approved as distributed.
- **Treasurer's Report:** State the bank name and account balance(s); attach the reconciliation report, budget report, reviewed and signed bank statement, and other details; a motion is not required to file the reports.
- **President's Report:** details
- **Principal's Report:** details
- **Committee Reports:** List the committees and their details
- **Unfinished Business:** details
- **New Business:** details
- **Announcements:** details
- **Adjournment:** The meeting adjourned at _____ am/pm.
- Secretary shall sign their full name and date the minutes in both the journal and the final approved minutes.

Draft Minutes: Minutes shall be typed within five days of its meeting, which are called the “draft minutes.” To begin, have the agenda, bound journal, Secretary’s binder, any reports or documents distributed at the meeting, verbatim copies of motions, and Bylaws at hand. Use the same template for all minutes which can be in a narrative or outline form. Number the pages consecutively. Assemble all attachments for inclusion with the final copy. Minutes are written in the third person. It is good practice to present the President with a draft for an initial viewing.

Approved Minutes: At the next meeting of that body and after the call to order, opening, and establishment of a quorum, the Secretary immediately stands and reads the distributed draft minutes. By a majority vote without debate, the reading of the minutes may be waived and not read. The minutes can also be read later in the meeting. Upon completion, the Secretary asks, “**Are there are any corrections?**” Corrections are made in red ink by drawing a line through the information with the correction above or written in the margin. The minutes are either “approved as read” or are “approved as corrected,” with the date of approval recorded, and the Secretary’s signature on the minutes. The Secretary closes by saying, “**The minutes are approved as read**” or “**The minutes are approved as corrected.**” A motion is not needed to approve the minutes. Once approved, the minutes become the official, recorded minutes.

The written minutes remain in the bound journal. All audio or video recordings must be discarded. A copy of the minutes may be stored on a flash drive. Should minutes not be available for approval, then those minutes are approved first at the next meeting. Past minutes are approved in date order. Minutes are read only to the body who created them. Unless password-protected, do not post on websites. Do not publish them in newsletters or post where non-members may access them.

It is permissible, if the meeting occurs less often than quarterly, to authorize a committee to approve the minutes on behalf of the assembly during the meeting. An annual convention is a good example. It would be futile to get the minutes one year later.

Correcting the Minutes: Corrections are suggested without motion or vote. Be grateful for corrections to the minutes. At least someone was listening closely enough to detect an error. Minutes may be corrected whenever the error is noticed, regardless of the time that has elapsed. To correct minutes after they have been approved requires a 2/3 vote. Corrections are made in red ink by drawing a line through the information with the correction above or written in the margin and initialed by the Secretary.

Nothing is ever erased once the minutes have been approved and signed. Any member has a right to examine the minutes of the General Membership meetings, but this right must not be abused. The original minutes must not be released from the custody of the Secretary except upon the written order of the President. If a committee needs records held by the Secretary, the Secretary provides a copy to the committee chair after consulting with the President. For help or questions, contact LAPTA at office@LouisianaPTA.org.

Distribution: The Secretary should provide the President with a copy of the minutes within five days and well in advance of the next meeting. Minutes of Board meetings can be distributed by email to save time at meetings. General Membership meeting minutes can be disbursed or posted on a bulletin board. If minutes have been previously distributed, they can be approved without reading and recorded as “approved as distributed.”

RECORDS RETENTION

Digital and paper records are acceptable.

Permanent

- Minutes
- Bylaws and Standing Rules
- PTA Charter
- Confidentiality, Ethics, and Conflict of Interest Policy
- Tax and Legal Correspondence
- Insurance Policies and Claims

7 Years

- Contracts and leases
- Budgets adopted at meetings
- Financial Report
- Grant Agreements

3 Years

- Bank statements
- Deposit Forms
- Expense Forms
- General correspondence

1 Year

- Routine Emails

SECRETARY'S BINDER

Create a Secretary's Binder using the previous Secretary's Binder or start a new one. Suggested sections:

Tab 1: Summary of PTA accounts and passwords and the Board roster.

Tab 2: LAPTA Toolkit: Secretary, plus sections 1, 5, 9, and 10 (at minimum)

Tab 3: Membership: spreadsheets, reports, notes, email campaigns, Welcome Packet, etc.

Tab 4: Agendas, Minutes, meeting rosters, committee reports from meetings

Tab 5: Copies of Deposit Forms and Expense Forms (optional)

Tab 6: Charter Info (filed IRS taxes, Bylaws, Standing Rules, Secretary of State Annual Report, insurance policy, past audit reports)

Tab 7: Other

CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*everychild.onevoice*). When used properly, PTA's logo and tagline create a consistent message, help to unify all PTAs, and set PTA apart from other organizations. The success of the PTA brand identity depends on all PTAs' adherence to the guidelines. PTA.org provides a uniform, effective system for PTAs to maintain a consistent, visual style and brand identity for all PTA-produced materials. Visit PTA.org/home/run-your-pta/PTA-Branding-and-Web-Guidelines. Download "**Customize Your PTA Logo**" Power Point file to type in the PTA name and save the customized logo.

Just as a Chick-fil-A franchise wouldn't change the logo of the company for its location, Local PTA Units may not change the PTA logo. It is a registered trademark. **The PTA Blue is Pantone 541c, or hex code #1A3E6F, or RGB (26, 62, 111). Only PTA Blue, black, or white may be used. The font is Arial Black.** The Registered Trademark symbol must follow "PTA" and the tagline "*everychild.onevoice*."



PTA is a ^{VERB!} ~~noun.~~
Louisiana Parent Teacher Association

COMMUNICATIONS AND SOCIAL MEDIA

Communication Strategy

Before posting on social media, take time to consider what information will be most useful for members and what communication methods will be most efficient. Use a variety of communication methods to reach all constituents. Not all communities have equal access to technology. Be aware of cultural and language differences and translate the materials into other languages as needed.

Social Media Administrators

Local PTA Units are encouraged to have an online presence through social media and other platforms. All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies. The purpose is to increase awareness, promote participation, and increase membership in PTA. Social media accounts must include “PTA/PTSA” or “Parent Teacher Association” to designate a different entity from the school. The administrators of social media accounts must be PTA Executive Committee or Board Members with a minimum of two administrators per account. The PTA has authority over the PTA social media accounts. Local PTA Units must respectfully work with their principals who shall be informed of any online accounts. Content must follow all school and school board rules, guidelines, and policies. No school may operate social media accounts with PTA/PTSA in its name.

Social Media

Social media platforms allow PTA to connect to members and potential members in a very interactive way. PTAs can share information, photos, and videos that can help to increase membership, communicate with current and potential members, fundraise, generate positive exposure, receive feedback, and network. **Use social media to teach, remind, and recognize the members. Consistently monitor the sites. Give credit where it is due.** In the process of gathering ideas and being influenced by others, remember to provide a link to the original content and use the author’s name and/or organization whenever possible. **Keep content and comments professional and respectful. Be consistent.** Be sure to maintain consistency across platforms with PTA brand guidelines. **Be safe.** Be particularly mindful of child and family privacy.

Choose PTA individuals who are willing and able to provide high-quality basic social media posts, produce content, and moderate content posted by others. Disagreements are central to growing ideas, but do not attack anyone personally. Quickly address any inappropriate messages or misuse of the PTA brand. Be prepared to respond to negative or inaccurate posts if a reply is warranted; however, some negative comments do not require a response, while others should be taken seriously and addressed.

Personal lives and professional work can intersect on social media. Navigating between them can be difficult. Communicate the ground rules ahead of time to ensure that all volunteers are clear about the expectations. When volunteers communicate through social media, unless authorized to speak on behalf of PTA, they are representing themselves and should use a disclaimer that what is being said is representative of their own views and opinions. If an individual is speaking on behalf of the PTA, that should also be made clear.

Privacy and Permission

PTA should not post photographs or images of any volunteers, families, children, etc., on any social media without having their express permission to do so. Secure a written consent form at events or at the beginning of the school year releasing the rights to use and post pictures. Do not discuss a situation involving individuals on a social media site that might identify the person. Don't post anything that would not be appropriate to present at a conference or in person. When sharing information from another source, assume that it is copyrighted and properly cite the source or provide a link to the original content.

AIM Insurance offers additional coverage for Media Liability to cover online liability.

COMMUNICATIONS OVERVIEW

Remember, You Are Representing the PTA

- Adhere to PTA policies regarding noncommercial, nonpartisan, and nonsectarian content.
- Inform every family in the school about the aims and accomplishments of the PTA.
- Encourage and highlight attendance at PTA meetings and family engagement in PTA programs.
- Foster cooperation with the school in keeping parents informed about school functions, regulations, and procedures on child-related issues.
- Inform the community about PTA activities and school functions.
- Express appreciation to those participating in or contributing to programs.
- Tackle barriers such as language and culture by translating materials.

Ensure Quality Communication

- 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.
- Use the PTA logo in all communications.
- Abide by copyright laws and republish articles and art in an ethical manner.
- Do not include photographs of or specific information (names, class, email, address, etc.) about adults or students without written permission.
- Create visually interesting communications with careful use of photographs, bullets, quotes, and graphics.
- Have 2-3 people other than the author proofread prior to publishing or posting.
- Keep the message brief and to the point.
- Arrange for translation services.
- Date all materials.

Social Media Guidelines

- **All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies.**
- Have at least two administrators for each site.
- Posts should be PTA-related such as flyers, events, grants, PTA and school deadlines, and other information valuable to PTA members.
- Keep information current.
- Respond promptly to messages and comments.
- Cite or link the source of original content.
- State when someone is speaking on behalf of the PTA.
- Contact the insurance company to discuss additional coverage for Media Liability.
- Consult Louisiana PTA for further guidance at President@LouisianaPTA.org.

SAMPLE AGENDA

Madison High PTA Board Meeting

January 19, 2024

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

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

Secretary's Report – MinutesStephanie

Treasurer's Report – Budget Review; Bank Balance: \$ ##,###Carolyn

President's Report –Tera

- Ramrock note; Slime date
- Bring-a-Buddy Breakfast; teacher treat day note

Committee Reports

- Principal's ReportMrs. Welch
- Membership CommitteeKatie
- Volunteer CommitteeSandra
- Fundraising.....Tera
- HospitalityJenn
- Room MomsKristie
- ReflectionsShelley
- Art Parents.....Amy
- Beautification.....Bessy
- Box Tops CommitteeAmy
- Newsletter.....Angie
- Uniforms.....Carolyn
- Grants & Awards.....Christie
- Teacher RepresentativeErin/Sarah

New Business

- Upcoming Flyers/Events -Beth

Old Business

Important Dates

Jan 23-26	Bring-a-Buddy Breakfasts	Feb 21	Board Meeting at 9:30
Jan 31	Dominos night	Mar 21	Board Meeting at 1:30

Adjournment.....Tera

SAMPLE MINUTES

ABC PTA Board of Directors Meeting

November 12, 2024

ABC Faculty Lounge

Call to Order: President Kayla Pagel opened the Board of Directors meeting at 9:03 a.m.

Opening: PTA Mission read by Kayla Pagel

Attendance: See the attached roster. A quorum was established.

Minutes: The minutes from 10/12/22 were dispersed by Secretary Beth Cleveland and approved as read.

Treasurer's Report: The XYZ Bank account balance is \$#,###. The dispersed budget and reconciliation reports were reviewed and filed. Treasurer Catherine Tully filed IRS taxes on 10/4/22.

President's Report: The Lunch & Learn for Family Engagement on 11/20/22 will have the LA Children's Advocacy Group to speak about students' reading skills. The Macho Taco food truck will be there for ordering food.

A MOTION WAS MADE by Tamika Anderson and seconded to create a Nominating Committee of Beth Allen, LaRonda Jones, and Sally Lincoln. A verbal vote was taken. **MOTION PASSED.**

Principal's Report: Volunteers are needed for the vision screening on December 2, 2022, at 9:30 a.m. Continue to check in at the office and follow all school visitor rules. Food drive on 12/19/22 needs non-perishable food donations.

Committee Reports:

Membership: 652 memberships YTD; submitted dues to LAPTA on 11/5/22 for 289 new members

Reflections: A verbal vote was taken in favor of a \$25 Barnes & Noble gift card for the Reflections winners.

Hospitality:

A MOTION WAS MADE by Julia Johnson and seconded to provide snacks for the teachers every Friday. **MOTION FAILED.**

Newsletter: Photos needed at the 8th Grade Dance on 11/28/22 and band concert on 12/6/22

Beautification: Need to decorate campus for Christmas/winter holidays.

Program: Sam Wright, DOTD, presented information about the Safe Routes to Schools Program.

Traffic:

A MOTION WAS MADE by Rene Townsend and seconded that the ABC PTA petition the city council to place a four way stop sign at the intersection of Fifth and Main Streets. **MOTION ADOPTED.**

Unfinished Business: Backordered fundraising prizes are still on order.

New Business:

Announcements: Next Meeting is on December 10, 2022, at 9:00 a.m.

Adjournment: The meeting adjourned at 10:15 a.m.

Beth Cleveland

Beth Cleveland, Secretary (or Secretary Pro-tem)

Approved as read on 11/12/22 or approved with corrections on NA

Any corrections shall be written on the minutes in the correct place and initialed by the Secretary.

MOTION FORM

I move that: _____

Printed name of person who made the motion

Signature

FOR SECRETARY'S USE

Meeting

Date

Motion Number

Motion was: Seconded Adopted Amended Failed Withdrawn

I move that: _____

Printed name of person who made the motion

Signature

FOR SECRETARY'S USE

Meeting

Date

Motion Number

Motion was: Seconded Adopted Amended Failed Withdrawn

ROSTER SIGN-IN SHEET

Meeting Name:		Date:	
Position	Name	Dues Submitted	Signature
President		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Vice-President		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Treasurer		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Secretary		<input type="checkbox"/> Yes <input type="checkbox"/> No	
Membership		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
		<input type="checkbox"/> Yes <input type="checkbox"/> No	
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		<input type="checkbox"/> Yes <input type="checkbox"/> No	

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

Members of the Board of Directors of the PTA 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.

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

9. Abide by and represent our PTA Bylaws, LAPTA policies, positions, procedures, and National PTA purposes and mission statement.
10. Discharge the duties and responsibilities of our individual offices with fidelity, integrity, and honesty and declare all personal and extended family conflicts of interest when PTA issues, decisions, and funds are involved.
11. Not misuse the PTA's federal tax-exempt status for personal or unauthorized purposes nor disburse funds for any purpose other than authorized, budgeted PTA programs, projects, and activities.
12. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA name or brand.
13. Publicly present a united front on decisions made as a Board.
14. Maintain confidentiality as a member of the Board.
15. Follow the LAPTA and school district guidelines for fundraising.
16. Abide by the following **Conflict of Interest Policy**:
 - h. Board members and their families shall not use their relation to this PTA for financial, professional, business, employment, personal, or political gain.
 - i. A conflict of interest exists when a Board member would have to participate in the deliberation or decision of any issue of this PTA while, at the same time, the board member and their extended family has financial, professional, business, employment, personal or political interests outside the PTA that could predispose or bias the board member to a particular view, goal, or decision.
 - j. Board members shall declare to the officers of this PTA conflicts of interest (stating the nature of the conflict and pertinent information as appropriate) between their duties of this PTA and their or their extended families' financial, professional, business, employment, personal or political interests.
 - k. When a conflict of interest is declared, the Board members shall not use their personal influence of position to affect the outcome of a vote and shall leave the room during deliberations and the vote.
 - l. **The minutes of the meeting shall note any declared conflict of interest.**
 - m. Board members shall not use PTA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.

Board members shall not directly or indirectly use their current PTA position, the PTA name or organization for or against any specific candidate for elected public office, which is contrary to federal tax laws and the guidelines and policies of the PTA

ACTIVE AFFILIATION REPORT ***VERY IMPORTANT***

Each membership year, local PTAs must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have “Active Affiliation” means that the Local PTA Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes nine items and are submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTA Units who do not maintain Active Affiliation will be subject to the Retention Plan. Deadline to submit the files is **October 27, 2023**.

DUE OCTOBER 27, 2023

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



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

RETENTION PLAN

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

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

PTA Leader Toolkit

2023 – 24

Section 5: Board of Directors



LouisianaPTA.org

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PTA is a ^{**VERB!**} ~~noun.~~
Louisiana Parent Teacher Association

LAPTA CALENDAR & IMPORTANT DATES

July 2023

- July 1 Board position terms begin
- July 15 Submit officer data at LouisianaPTA.org/register

August 2023

- August 1 Submit officer data at LouisianaPTA.org/register
- August 15 Reflections Program opens
- August 12 Start working on Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.
- August 19 LAPTA Leadership Training South for southern Local PTA Units
- August 25 Submit new membership dues at LouisianaPTA.org/membership
- August 26 LAPTA Leadership Training North
- August 30 Reflections Program Training Zoom Meeting at 12:00 pm and 7:00 pm

September 2023

- September 1 Review PTA.org and *LAPTA ToolKit: Grants* for available grants and their deadlines
- September 5 Healthy Minds Zoom Training at 12:00 noon and 7:00 pm
- September 6 Reflections Q&A Zoom Meeting at 12:00 noon and 7:00 pm
- September 11 Affiliation Requirements Zoom Training at 12:00 noon and 7:00 pm
- September 12 Programs & Grants Zoom Training at 12:00 noon and 7:00 pm
- September 13 Secretary Zoom Training at 12:00 noon and 7:00 pm
- September 14 Membership Zoom Training at 11:00 am and 6:00 pm
- September 14 Presidents & VPs Zoom Training at 12:00 noon and 7:00 pm
- September 16 Treasurer Zoom Training at 12:00 noon
- September 19 Diversity & Inclusion Zoom Training at 12:00 noon and 7:00 pm
- September 21 Developing Your Leaders Zoom Training at 12:00 noon and 7:00 pm
- September 25 Submit new membership dues at LouisianaPTA.org/membership

October 2023

- October 1 Deadline for National PTA.org School of Excellence submissions
- October 12 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- October 14 Statewide Election Day – Advocate for all children by voting
- October 20 Red Ribbon Poster Contest Deadline to Submit to LAPTA
- October 23–31 National Red Ribbon Week
- October 25 Submit new membership dues at LouisianaPTA.org/membership
- October 27 Deadline for Active Affiliation Report. See LouisianaPTA.org/activeaffiliation.**
- October 30 LAPTA Red Ribbon Poster Contest Winners Announced

November 2023

- November 1 Plan Family Reading Experience Event; visit PTA.org/home/programs/family-reading
- November 15 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- November 17 LAPTA Literacy Grant Deadline (<https://form.jotform.com/221748002230038>)
- November 17 Reflections Theme Contest Submission Deadline <https://form.jotform.com/221745830340147>
- November 18 Statewide Election Day – Advocate for all children by voting
- November 25 Submit new membership dues at LouisianaPTA.org/membership
- November 30 LAPTA Reflections Theme Search Winners announced

December 2023

- December 1 LAPTA Literacy Grant Winners Announced
- December 5 Reflections Q&A Zoom Meeting at 12:00 pm and 7:00 pm
- December 20 Submit new membership dues at LouisianaPTA.org/membership

January 2024

- January 22 Reflections Submission Deadline to LAPTA
- January 25 Submit new membership dues at LouisianaPTA.org/membership

February 2024

- February 9 Louisiana PTA's 100th Birthday
- February 13 Mardi Gras Day
- February 17 National PTA Founders' Day
- February 28 Submit new membership dues at LouisianaPTA.org/membership

March 2024

- March 1 LAPTA Reflections Program LAPTA winners announced
- March 1 LAPTA Day of Service Grant application deadline at LouisianaPTA.org/grants
- March 1 Newsletter Award application deadline at LouisianaPTA.org/awards
- March 1 Advocacy Award application deadline at LouisianaPTA.org/awards
- March 2 Read Across America Day (nea.org)
- March 22 Deadline for Volunteer of the Year Award and Mentor-a-PTA Award
- March 25 Submit new membership dues at LouisianaPTA.org/membership
- March 27 LAPTA Healthy Minds Grant Application Deadline at LouisianaPTA.org/grants
- March TBA National PTA Legislative Convention (LegCon)

April 2024

- April Transition Time and Planning for the Year Ahead
- April 1 Deadline for Creative Teacher Grants at LouisianaPTA.org/grants
- April 1 Deadline for membership reports for LAPTA Annual Membership Awards
- April 20 LAPTA Recognition Ceremony and State Meeting; Winners announced for Day of Service Grants, Creative Teacher Grants, Volunteer of the Year, and Outstanding Newsletter Awards
- April 25 Submit new membership dues at LouisianaPTA.org/membership
- April 28 Submit officer data at LouisianaPTA.org/register

May 2024

- May Transition Time and Planning for the Year Ahead
- May 1 LAPTA Healthy Minds Grant Winners Announced
- May 6-10 Teacher Appreciation Week
- May 25 Submit new officer data at LouisianaPTA.org/register
- May 25 Submit new membership dues at LouisianaPTA.org/membership

June 2024

- June 1 Search and publicize Summer Learning Programs at PTA.org and your local community
- June 25 Submit new officer data at LouisianaPTA.org/register
- June 30 Submit new membership dues at LouisianaPTA.org/membership
- June TBD National PTA Virtual Convention (tentative dates)



BEING A BOARD OF DIRECTORS MEMBER

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

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

Board of Directors Composition

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

Duties of the Board of Directors

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

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

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

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

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

LEADERSHIP TRAITS

Successful leaders are effective leaders. Their skills and abilities allow them to step into a variety of roles, and they see the value people have to offer and seek their involvement. They provide a clear purpose that others want to follow. They lead with integrity and strive to continually improve. **PTA Leaders are always looking for their replacement and intentionally reach out to others.** Competent and effective leaders have:

- **Self-Awareness** – Has the ability to assess their own strengths and weaknesses.
- **Vision** – Demonstrates a clear understanding of the future and how to get there.
- **Relationship Building** – Develops trust and mutual respect, and values diversity.
- **Critical Thinking** – Obtains all the relevant information, identifies problems and causes, evaluates information, and determines criteria that indicate solutions.
- **Time & Resource Management** – Effectively prioritizes and manages resources to accomplish goals.
- **Motivation** – Demonstrates and promotes interest and enthusiasm.
- **Empathy** – Recognizes verbal and nonverbal feelings, needs, and concerns of others.
- **Creativity** – Sees and thinks of innovative ideas, alternatives, and ways to do things.
- **Communication** – Listens actively and conveys information clearly and concisely in writing and speech.
- **Collaboration** – Works with a team to achieve a common purpose; puts service before self.
- **Delegation** – Shares responsibilities including guidance and follow up, fostering leadership in others.
- **Continuous Learning** – Pursues development of skills and knowledge.
- **Integrity** – Does the right thing when no one is watching.
- **Initiative** – Steps up unprompted, going above and beyond with excellence.

IMPORTANCE OF BOARDSMANSHIP

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

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

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

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

QUORUM

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

GETTING STARTED

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

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

Duties at a Glance

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

Qualities of Effective Officers

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

EXECUTIVE COMMITTEE

The Executive Committee consists of the elected officers of the PTA. They all assist the President to reach the goals of the PTA. The duties of officers are specified in the Bylaws and Standing Rules. The **President** directs the affairs of the PTA in cooperation with the other members of the Executive Committee and Board of Directors. See the *LAPTA Toolkit: President* for full details. The **Vice-Presidents** aid the President. The President may delegate specific programs such as Membership, Legislation, or Reflections Program to a Vice-President. A Vice-President can act in place of the President only when empowered by the President or when empowered to act by the Board of Directors in the President's inability. The **Treasurer** receives and disburses all money as the authorized custodian of PTA funds as prescribed in the Bylaws or authorized by the PTA. See *LAPTA Toolkit: Treasurer* for full details. The **Secretary** keeps accurate records of the proceedings of the PTA and is the custodian of the PTA records. See *LAPTA Toolkit: Secretary* for full details.

COMMITTEES

Committees are the working machinery of the PTA that plan and promote its activities. Each committee is headed by its appointed or elected "chair" based on their qualifications for the committee's field of work. It has a definite function and is subject to the control and direction of the PTA. The work and goals of the PTA determine the number and nature of the committees necessary. Refer to the Bylaws and Standing Rules for specific information about committees and the selection of committee chairs. A committee only has the authority that it is specifically given. Committees do not function as separate groups but are part of the PTA and must operate within the framework of PTA Bylaws, policies, and procedures. All projects and activities must have the approval of the Board of Directors and the PTA in advance.

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

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

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

COMMITTEE EXAMPLES

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

Budget Committee develops the PTA budget. The Treasurer acts as the chair. Two or more additional members are elected or appointed according to the Bylaws. The committee studies the previous year's budget and Treasurer's reports to determine how well the budget met the unit's needs. The Treasurer submits the budget to the General Membership for approval. The committee may meet at various times during the year to

determine if budget changes are necessary. Changes may only be made by amendment at a General Membership meeting. It is recommended that notice of such pending action be given prior to the meeting date.

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

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

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

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

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

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

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

Healthy Lifestyles Committee educates parents about the physical, mental, and emotional health needs of children. It is the shared responsibility of families, schools, and communities to develop the "whole child." Together, they can ensure that every child is healthy, safe, engaged, supported, and challenged. Visit PTA.org/home/programs/Healthy-Lifestyles and PTA.org/home/run-your-pta/how-we-pta/social-and-emotional-well-being. See PTA.org/home/run-your-pta/how-we-pta/addressing-food-insecurity for info on food insecurity.

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

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

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

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

Mental Health Committee supports mental health for the students. National PTA has a new Mental Health Pilot Program and Louisiana was one of only a few to implement it! **Jessica Latin was named as the Louisiana Healthy Minds State Champion**. She is a licensed professional counselor and serves as Secretary for the Judson Warriors PTA in Shreveport, LA. For the next 3 years, she will be empowering families with resources and tools to help them make mental health a daily priority! Follow her and learn more at [PTA.org/HealthyMinds](https://pta.org/HealthyMinds), search "Louisiana PTA Healthy Minds" on Facebook, or email Jessica at healthyminds@LouisianaPTA.org.

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

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

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

VIRTUAL MEETINGS

The PTA Board of Directors is authorized to meet on a virtual meeting platform, through electronic communications media, or telephone conference call with proper notice of the meeting in accordance with the Bylaws. All attendees must be able to hear and participate in the business being discussed. For General Membership meetings, the first of the year and election meetings must be in person. For Board meetings, the first of the year meeting plus one other meeting must be in person. Virtual meeting guidelines are listed in the Bylaws. Meetings may be recorded by one Board member, preferably the Secretary, for the purpose of accurately documenting business. There are specific guidelines for recording in the Bylaws.

SETTING GOALS

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

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

FINANCE FOR BOARD MEMBERS

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

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

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

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

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

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

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

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

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

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

HOW BOARDS SUCCEED

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

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

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

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

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

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

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

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

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

LAPTA DEVELOPMENT DAYS AND TRAINING

All elected officers for Local PTA Units shall complete annual PTA Development Days and Training. Proof of training is required for the Active Affiliation Packet. Other Board members are encouraged to receive training, as well. Board members should understand the other positions and roles within the Board. Sources for training are **LAPTA Development Days** which is in-person training on August 19, 2023, in southern LA or August 26, 2023 in northern LA. **LAPTA offers Training Videos** at LouisianaPTA.org/training. Complete the online *Proof of Training Certificate*.

PROCEDURE BINDER

A Procedure Binder is one of the most important basic tools in PTA work and is often the least used. LAPTA strongly urges all local units' officers and chairs to maintain an accurate and complete Procedure Binder for all work of the PTA. Since most new recruits have little or no experience on the job, the binder helps to identify the task and chart a course of action. A Procedure Binder tells of the history of the PTA and what the position entails. It is an up-to-date record that gives a foundation on which to build. If an officer or chair has not received a binder from their predecessor, now is the time to start one. The Procedure Binder is the property of the PTA and not of the person who is using it.

A loose-leaf binder with dividers is essential. If materials will not fit in the binder, use an expandable folder. Each binder may be used for more than one year and be updated by the current user. Procedure Binders should contain calendars of school district, PTA events, and LAPTA deadlines. Include resource materials such as the Bylaws, Standing Rules, approved budget, Board roster, summary of any passwords and accounts, Expense and Deposit Forms, and information from National PTA and LAPTA. Include reports, agendas, and minutes from all meetings. Everything should have a place in the Procedure Binder.

EMAIL PROTOCOL

It is recommended that local units create PTA emails for the Board which are handed down to successors. The use of personal accounts is discouraged. Passwords and accounts need to be known by the President and at least the Secretary.

Email as a means of communication is subject to the same professional standards used in writing a letter or speaking as a PTA representative. Be careful what is said. Always include names, proper openings, closings, and "PTA" in the subject heading. Use the tagline *everychild.onevoice*.[®] Email is not to be used for discussing details of sensitive issues that relate to an individual's removal from office, hearings, or investigative meetings. Copy the President and/or Vice-President when appropriate and obtain the approval of the President if the email is considered important or being sent to many members.

Keep messages short when possible. Proofread the email and check for tone. Respond to email as soon as possible but not later than 3-5 days. If sending an attachment with the email, always include a message in the body of the email. Email should be courteous, concise, clear, communicate the message, have a cooperating tone, and spell checked. When sending emails to a large list of people, use an email service such as MailChimp which is free. This way the recipients do not see everyone else's email address and it is convenient and organized.

COMMUNICATIONS AND SOCIAL MEDIA

Communication Strategy

Before posting on social media, take time to consider what information will be most useful for members and what communication methods will be most efficient. Use a variety of communication methods to reach all constituents. Not all communities have equal access to technology. Be aware of cultural and language differences and translate the materials into other languages as needed.

Social Media Administrators

Local PTA Units are encouraged to have an online presence through social media and other platforms. All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies. The purpose is to increase awareness, promote participation, and increase membership in PTA. Social media accounts must include “PTA/PTSA” or “Parent Teacher Association” to designate a different entity from the school. The administrators of social media accounts must be PTA Executive Committee or Board Members with a minimum of two administrators per account. The PTA has authority over the PTA social media accounts. Local PTA Units must respectfully work with their principals who shall be informed of any online accounts. Content must follow all school and school board rules, guidelines, and policies. No school may operate social media accounts with PTA/PTSA in its name.

Social Media

Social media platforms allow PTA to connect to members and potential members in a very interactive way. PTAs can share information, photos, and videos that can help to increase membership, communicate with current and potential members, fundraise, generate positive exposure, receive feedback, and network. **Use social media to teach, remind, and recognize the members. Consistently monitor the sites. Give credit where it is due.** In the process of gathering ideas and being influenced by others, remember to provide a link to the original content and use the author’s name and/or organization whenever possible. **Keep content and comments professional and respectful. Be consistent.** Be sure to maintain consistency across platforms with PTA brand guidelines. **Be safe.** Be particularly mindful of child and family privacy.

Choose PTA individuals who are willing and able to provide high-quality basic social media posts, produce content, and moderate content posted by others. Disagreements are central to growing ideas, but do not attack anyone personally. Quickly address any inappropriate messages or misuse of the PTA brand. Be prepared to respond to negative or inaccurate posts if a reply is warranted; however, some negative comments do not require a response, while others should be taken seriously and addressed.

Personal lives and professional work can intersect on social media. Navigating between them can be difficult. Communicate the ground rules ahead of time to ensure that all volunteers are clear about the expectations. When volunteers communicate through social media, unless authorized to speak on behalf of PTA, they are representing themselves and should use a disclaimer that what is being said is representative of their own views and opinions. If an individual is speaking on behalf of the PTA, that should also be made clear.

Privacy and Permission

PTA should not post photographs or images of any volunteers, families, children, etc., on any social media without having their express permission to do so. Secure a written consent form at events or at the beginning of the school year releasing the rights to use and post pictures. Do not discuss a situation involving individuals on a social media site that might identify the person. Don't post anything that would not be appropriate to present at a conference or in person. When sharing information from another source, assume that it is copyrighted and properly cite the source or provide a link to the original content.

AIM Insurance offers additional coverage for Media Liability to cover online liability.

COMMUNICATIONS OVERVIEW

Remember, You Are Representing the PTA

- Adhere to PTA policies regarding noncommercial, nonpartisan, and nonsectarian content.
- Inform every family in the school about the aims and accomplishments of the PTA.
- Encourage and highlight attendance at PTA meetings and family engagement in PTA programs.
- Foster cooperation with the school in keeping parents informed about school functions, regulations, and procedures on child-related issues.
- Inform the community about PTA activities and school functions.
- Express appreciation to those participating in or contributing to programs.
- Tackle barriers such as language and culture by translating materials.

Ensure Quality Communication

- 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.
- Use the PTA logo in all communications.
- Abide by copyright laws and republish articles and art in an ethical manner.
- Do not include photographs of or specific information (names, class, email, address, etc.) about adults or students without written permission.
- Create visually interesting communications with careful use of photographs, bullets, quotes, and graphics.
- Have 2-3 people other than the author proofread prior to publishing or posting.
- Keep the message brief and to the point.
- Arrange for translation services.
- Date all materials.

Social Media Guidelines

- **All PTA social media posts must be respectful, truthful, discreet, and responsible. Posts must be noncommercial, nonsectarian, and nonpartisan according to PTA policies.**
- Have at least two administrators for each site.
- Posts should be PTA-related such as flyers, events, grants, PTA and school deadlines, and other information valuable to PTA members.
- Keep information current.
- Respond promptly to messages and comments.
- Cite or link the source of original content.
- State when someone is speaking on behalf of the PTA.
- Contact the insurance company to discuss additional coverage for Media Liability.
- Consult Louisiana PTA for further guidance at President@LouisianaPTA.org.

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

Members of the Board of Directors of the PTA 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.

In consideration of the PTA's affiliation with Louisiana PTA, for the protection of its integrity and its 501(c)(3) 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, decisions, and funds are involved.
3. Not misuse the PTA's federal tax-exempt status for personal or unauthorized purposes nor disburse funds for any purpose other than authorized, budgeted PTA programs, projects, and activities.
4. Refrain from making any slanderous or defamatory statements that could result in harm to the PTA name or brand.
5. Publicly present a united front on decisions made as a Board.
6. Maintain confidentiality as a member of the Board.
7. Follow the LAPTA and school district guidelines for fundraising.
8. Abide by the following **Conflict of Interest Policy**:
 - n. Board members and their families shall not use their relation to this PTA for financial, professional, business, employment, personal, or political gain.
 - o. A conflict of interest exists when a Board member would have to participate in the deliberation or decision of any issue of this PTA while, at the same time, the board member and their extended family has financial, professional, business, employment, personal or political interests outside the PTA that could predispose or bias the board member to a particular view, goal, or decision.
 - p. Board members shall declare to the officers of this PTA conflicts of interest (stating the nature of the conflict and pertinent information as appropriate) between their duties of this PTA and their or their extended families' financial, professional, business, employment, personal or political interests.
 - q. When a conflict of interest is declared, the Board members shall not use their personal influence of position to affect the outcome of a vote and shall leave the room during deliberations and the vote.
 - r. **The minutes of the meeting shall note any declared conflict of interest.**
 - s. Board members shall not use PTA's name, influence, or resources for their benefit or gain when running for any public elected office or while serving as an elected official.

Board members shall not directly or indirectly use their current PTA position, the PTA name or organization for or against any specific candidate for elected public office, which is contrary to federal tax laws and the guidelines and policies of the PTA

ACTIVE AFFILIATION REPORT ***VERY IMPORTANT***

Each membership year, local PTAs must submit paperwork to obtain **Active Affiliation Status** with Louisiana PTA and National PTA. To have “Active Affiliation” means that the Local PTA Unit is current with its obligations to maintain its IRS status and National PTA affiliation. The Active Affiliation Report includes nine items and are submitted online in many file formats at <https://form.jotform.com/221816998285068> or scan the QR Code. Local PTA Units who do not maintain Active Affiliation will be subject to the Retention Plan. Deadline to submit the files is **October 27, 2023**.

DUE OCTOBER 27, 2023

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



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

RETENTION PLAN

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

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

PARTNERING WITH ADMINISTRATORS

Louisiana PTA issues **Operating Guidance** to further advise and support Local PTA Units on PTA best practices. See LouisianaPTA.org/guidance. Email LAPTA President, [Kayla Pagel](#) for further clarification.

Do:

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

Don't:

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

PARTNERING WITH TEACHERS

Louisiana PTA issues **Operating Guidance** to further advise and support Local PTA Units on PTA best practices. See LouisianaPTA.org/guidance. Email LAPTA President, [Kayla Pagel](#) for further clarification.

Do:

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

Don't:

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

PTA Leader Toolkit

2023 – 24

Section 6: Membership

LouisianaPTA.org/membership



LouisianaPTA.org

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CUSTOMIZE THE PTA LOGO

PTA established guidelines for the proper use of the PTA name, logos, and tagline (*everychild.onevoice*). When used properly, PTA’s logo and tagline create a consistent message, help to unify all PTAs, and set PTA apart from other organizations. The success of the PTA brand identity depends on all PTAs’ adherence to the guidelines. PTA.org provides a uniform, effective system for PTAs to maintain a consistent, visual style and brand identity for all PTA-produced materials. Visit PTA.org/home/run-your-pta/PTA-Branding-and-Web-Guidelines. Download “**Customize Your PTA Logo**” Power Point file to type in the PTA name and save the customized logo.

Just as a Chick-fil-A franchise wouldn’t change the logo of the company for its location, Local PTA Units may not change the PTA logo. It is a registered trademark. **The PTA Blue is Pantone 541c, or hex code #1A3E6F, or RGB (26, 62, 111). Only PTA Blue, black, or white may be used. The font is Arial Black.** The Registered Trademark symbol must follow “PTA” and the tagline “*everychild.onevoice*.”

MEMBERSHIP INTRODUCTION

PTA plays a vital role in connecting parents, teachers, and administrators and in supporting critical school needs. One goal of PTA is to make visible its often-invisible work by highlighting the value and impact of PTA on individual children and emphasizing that membership involves as much or as little time as one has to offer. Only members have the right to bring motions, debate issues, and vote on PTA business at General Membership meetings. In addition, the local PTA may offer member-only benefits like a directory, no-waiting access at events, discounts on school supplies or spirit wear, etc.

Membership is the foundation of PTA. The membership chair is the one most responsible for enrolling as many new members as possible for the PTA. This is one of the most important duties in the entire organization, for nothing can happen without members. Membership is open to anyone who believes in the National PTA Mission and Purposes. PTA is committed to being inclusive in its efforts to represent and assist all who nurture and educate children. It not only welcomes but actively seeks in its membership the widest diversity of cultures, races, ethnicities, creeds, and economic and educational statuses. National PTA is the largest and oldest nonprofit, volunteer, child-advocacy organization in the country. Its purpose is to make better lives for all children and youth. Because the membership of the PTA comes from such geographically, culturally, and economically diverse backgrounds, this organization has the true potential to help every child.

This Membership Toolkit outlines how to best communicate about the value of PTA membership. This campaign is built to bolster the existing membership recruitment work with consistent messaging and customizable, dynamic visuals to use in emails, on websites, and on social media channels. Visit PTA.org and select Membership Resources under the “Run Your PTA” menu for graphics, resources, and documentation. LAPTA cannot thank the Membership Chairs enough for the work they do on behalf of PTA. This new campaign theme will increase membership and build on the important work being done!

GETTING STARTED

Whether there are more volunteers than can be managed or just a few dedicated folks, a PTA can build a vibrant and robust membership. Growing membership is the most critical function in any PTA. Create quick and early momentum with these steps!

Quick-Start Actions

Email all executive committee members, teachers, and last year’s members inviting them to re-join for the new year. Speak to the previous membership chair and ask for a copy of the previous year’s roster. There are even Membership Awards available. Challenge each executive committee member to recruit five members or more.

Ask the principal to routinely promote the value of PTA to the faculty and promote the PTA on the school marquee and other campus advertising opportunities. Ask each school board member to join the PTA. Provide the school office with extra PTA welcome letters and membership packets for new families.

Work with a committee to develop a plan to accomplish the membership goals. Take advantage of all the free resources provided by LAPTA to make the job easier. Visit LouisianaPTA.org/membership and PTA.org under the Membership menu for lots of ideas and support documents.

PROCEDURE BINDER

Create a Procedure Binder for membership using the previous Membership Chair's binder or start a new one.

Tab 1: Include a summary of any accounts and passwords and the Board roster.

Tab 2: LAPTA Toolkit: Membership plus Sections 1 and 5, Bylaws, and Standing Rules

Tab 3: Membership Reports (Rosters)

Tab 4: Agendas & Minutes

Tab 5: Notes, email campaigns, Welcome Packet, and other membership materials

Tab 6: Deposit Forms and Expense Forms from the Treasurer

Tab 7: Other

MEMBERSHIP CHAIR DUTIES

- Register online with LAPTA at LouisianaPTA.org/register.
- Regularly submit dues and membership rosters at LouisianaPTA.org/membership.
- Attend all meetings.
- Understand and share the value that a thriving membership brings to the school and community.
- Form a committee to help plan, recruit, and recognize members.
- Use National PTA's annual theme or develop a unique message.
- Invite every family and faculty member to join PTA.
- Provide repeated opportunities for people to join at every PTA event, on social media, and in all PTA communications.
- Distribute membership thank you notes with membership benefits listed at PTA.org to all members.
- Before each meeting, provide the Secretary with the most current membership roster.
- Frequently update the school families, local community, and businesses on progress toward the goal.
- Celebrate membership successes with the school and on social media.

MEMBERSHIP DUES

When someone joins a Local PTA Unit, they also become a member of Louisiana PTA (LAPTA) and National PTA. Each unit must submit to LAPTA \$3.50 per member. National PTA receives \$2.25 and LAPTA receives \$1.25. LAPTA has the responsibility of forwarding National PTA's portion. The Local Unit is obligated to remit dues for every person who joins their PTA. A unit's Active Affiliation could be in jeopardy if it, for example, it collects dues from 100 members but only remits dues to LAPTA for 30. See "Submit Membership Dues" in this section for details on submitting member dues to LAPTA.

Membership in a PTA is required for the privilege of voting, holding office, and attending the LAPTA and National PTA Conventions as a voting delegate. All Board members are required to submit membership dues. See the Roster Form at the end of this section to help track who still owes dues. Joining one PTA does not give voting privileges in another PTA. Dues must be submitted to each separate PTA. Membership is valid from date of issue through June 30 of each year.

The Treasurer shall deposit any checks or cash collected from the membership drive at their school as soon as possible. Memberships shall be submitted monthly to LAPTA.

SUBMIT MEMBERSHIP DUES

STEP 1: The first step to processing memberships is to go to LouisianaPTA.org/submit-dues. Click “PAYMENT LINK” which links to CheddarUp.com. Purchase the number of individual memberships sold by the PTA. The cost is \$3.50 each. Local Units must purchase a minimum of 30 memberships from LAPTA per year. The exact number of memberships sold to their members must be purchased. It is important to properly account for all members. LAPTA forwards the National PTA dues portion of \$2.25 to National PTA.

STEP 2: Download the Excel spreadsheet called “LAPTA Local PTA Membership Report” by going online to LouisianaPTA.org/membership. This is the format used for Membership Reports. Rename the file with the [PTA name] Member Report [date]. In the spreadsheet, enter the information in the top section and then last name, first name, and email for every member into the spreadsheet. After submitting dues, **email the Membership Report to office@LouisianaPTA.org.**

LAPTA LOCAL UNIT MEMBERSHIP REPORT 2022-23	
After submitting dues, email this Member Report to office@LouisianaPTA.org .	
PTA Name: _____	Today's Date: _____
School Name: _____	School's Student Count: _____
School City: _____	School's Teacher/Admin Count: _____
School Parish: _____	Your PTA's Membership Goal: _____
Your Name: _____	Total Memberships Year to Date: _____
Your Email: _____	New Memberships for this Report: _____

Member Last Name	First Name	Email Address
<i>Last</i>	<i>First</i>	<i>Email</i>
<i>Last</i>	<i>First</i>	<i>Email</i>
<i>Last</i>	<i>First</i>	<i>Email</i>
<i>Last</i>	<i>First</i>	<i>Email</i>

Repeat the process above monthly. Memberships are good for one year, expiring on June 30. Send out a thank you note to all members by email or paper note at least monthly. Include LouisianaPTA.org and PTA.org for members to check out. A sample is at the end of this section.

MEMBERSHIP CAMPAIGN THEME

Visit PTA.org and select Membership Resources under the “Run Your PTA” menu where you can find graphics, resources, and support documentation. While a Local PTA Unit can choose their own annual membership theme, National PTA chose a clear and concise phrase to motivate and recruit new members and reinforce the value of PTA membership. The three membership themes are:

- 1. PTA For Your Child**
- 2. You Belong in PTA**
- 3. PTA is a VERB!**

This overarching message serves as the basis for all campaign messaging. The number one reason people did not join PTA was because no one asked them! PTA offers all parents and caregivers the opportunity to be engaged in their child's potential. Being a member of PTA means that they are part of a powerful association and action plan that focuses on programs and initiatives that strengthen the child's education and the family-school partnership. PTA is all an investment in the child: PTA to support the child's teachers and curriculum; PTA to advocate on the issues impacting the child and affect change at the local, state, and national levels; and PTA to build a stronger, more diverse, and inclusive school community. There is no wrong way to PTA. All are invited to participate because we can do more together than apart.

How do you PTA? PTA is no longer a noun. It's a verb, an action plan working to support the success of all children! Members can give money by joining and donating, volunteer their time and effort, or help grow the PTA presence at the local, state, and national levels as an advocate for children's education.

Create a dynamic Membership Welcome Packet at the start of school which can contain everything PTA for the upcoming year. Create a concise form for members to join PTA. Offer online options to join on a platform such as CheddarUp.com. PTA.org has a wealth of resources, graphics, and documentation for membership. Click *Membership* under the "Run Your PTA" menu. The only personal information needed for LAPTA is their first and last name and an email. A sample "membership ask" and a thank you note and email are at the end of this section.

Setting Goals

LAPTA has a goal for each Local PTA Unit to grow from the previous year. For the current goal, email MembershipChair@LouisianaPTA.org. Work with the committee to set recruitment goals to keep everyone focused and on track for success. How will people join? Some PTAs have online purchasing options on platforms such as CheddarUp.com, or they use traditional envelopes, Membership Packets, emails, social media, and more. Have sign-up tables at Open House or Meet the Teacher events. Continue to recruit throughout the year. Ask local businesses, extended family, local government, and community leaders. Make a good first impression to positively shape how members perceive PTA. This will set the tone to improve support, engagement, and membership renewal in future years.

Best Practices: How to Ask

When asked why they didn't join PTA, many people say, "Nobody ever asked me!" Whether completely accurate or not, it takes asking repeatedly before everyone actually hears and joins. The membership should reflect the whole community, so remember to ask everyone. Not everyone will come into the school, see the Facebook post, or find the invitation in their child's backpack, so remember to ask everywhere. People will need to see or hear the invitation multiple times before acting on it, so ask often.

Top 10 Reasons People Join PTA by Rank:

1. Supporting my local school
2. Taking an interest specifically in my children's education
3. Taking a general interest in the education of children
4. Staying informed on local campus news
5. Connecting with teachers and administrators
6. Connecting with other parents and community leaders
7. Supporting LAPTA's efforts to advocate on behalf of children
8. Volunteering for a position in the local school
9. Influencing or having a say on how funds are spent at my school
10. Staying informed on state-wide educational news

When figuring out how to inspire people to join, look at the reasons people said they joined and what they value the most. The research can also help to be ready to answer the question, why should I join? More than 90% of members join because they believe it is a great way to support their child, the school, and the community.

- Join to support your child!
- Join to support our school!
- Join to support our community!
- Join so you can stay informed on what is going on at our school!
- Join to get better connected to our teachers and administrators!
- Join to meet other parents who value high-quality education!

One of the responsibilities of Membership Chairs is to celebrate success. It is critically important to engage with members. When successful, shout it from the rooftops! People want to be a part of a successful group. Celebrating success accomplishes two goals: appreciating members and aiding recruitment. Sharing

accomplishments also reminds members that their PTA is part of a larger association that does care about them. Encourage members to participate by creating volunteer opportunities and providing programs that will be of value. Members indicated the number one reason they join PTA is to support their school. Give them the opportunity to have influence by joining, participating, and volunteering. Once they get involved in smaller ways, they may be comfortable with and interested in taking on a bigger role.

CREATE YOUR OWN PTA VALUE MESSAGE

When seeking PTA members, remember to always make an explicit Ask to Join. Clarify what PTA membership means and that it is different from volunteering. Remember that *everyone* belongs in PTA, and that *everyone* is interested once they understand the association's value and role.

To create a custom PTA message, use the following three high-value areas for the different audiences the PTA wants to recruit. For each value, answer three questions and then combine it into a Value Message. Below are sample answers put together to create an impactful statement.

See the complete details on creating custom messages with many more sample answers at [PTA.org-how-to-create-your-own-pta-value-message.pdf](https://www.pta.org/how-to-create-your-own-pta-value-message.pdf). Find it online at PTA.org. Under *Run Your PTA* menu, hover over *Membership*, and select *You Belong in PTA*. Ask and answer three questions, and then combine it into one Value Statement. Here are three examples.

Value Message 1: Our PTA Creates Connections

- 1) Why should I join the PTA? SAMPLE ANSWER: Your PTA membership can help you build a village to support your child and connect you locally and nationally to a network that supports all children.
 - 2) Specifically, in what ways does the PTA Create Connections? ANSWER: Meet and have fun with new people and families with kids your child's age! Connect to important school and community resources.
 - 3) How do those ways benefit me/my child? ANSWER: Access resources both inside and outside the school building, like [insert examples of things your PTA has done or intends to do. You can also give examples from National PTA, like the Guides to State Assessments, mental health resources from the Healthy Minds Program, or parenting news and tips from the *Notes from the Backpack* podcast].
- Customize the following graphic to fit your PTA message, name, and add your website and QR Code.*

Our PTA Creates Connections

It takes a village to raise a child – and PTA is how you build that village for your child.

Our PTA


You should join our PTA because your membership can help you build a village to support your child and connect you locally and to a nationwide network that supports all children. When you belong to our PTA, you'll connect to important school and community resources. Being a member of our PTA will help you access resources both inside and outside the school building, like mental health resources from Healthy Minds Program, or parenting news and tips from the Notes from the Backpack Podcast. Will you support our efforts by becoming a member?

JOIN our PTA by scanning the QR Code or going online at ...

Value Message 2: Our PTA Supports Your Child

- 1) Why should I join the PTA? ANSWER: Our PTA supports your child with education, health, & safety programs.
- 2) Specifically, how does the PTA support my child? ANSWER: Gain access to resources that support whole child development in the arts and sciences; physical and mental health; digital safety and citizenship; etc.
- 3) How do those ways benefit me/my child? ANSWER: Our PTA helps you and your child by hosting guest reader events and book fairs and donating books to students to encourage a life-long love of reading. Will you support our efforts by becoming a member?

Customize the following graphic to fit your PTA message, name, and add your website and QR Code.



Our PTA Supports Your Child

PTA gives you the tools you need to support your

Our PTA


You should join our PTA because PTA supports your child with education, health, and safety programs. When you belong to our PTA, you'll gain access to resources that support whole child development in the arts and sciences; physical and mental health; digital safety and citizenship; and more! Our PTA helps you and your child by hosting guest reader events and book fairs and donating books to students to encourage a life-long love of reading. Will you support our efforts by becoming a member?

JOIN our PTA by scanning the QR Code or going online at ...

Value Message 3: Our PTA Amplifies Your Voice

- 1) Why should I join the PTA? A: PTA amplifies your voice through collective impact. We can do more together than we can apart!
- 2) How does the PTA support my child? A: Learn what you can do to positively impact students, families, and schools, as well as education programs and services. Enhance your knowledge and skills as an advocate.
- 3) How do those ways benefit me/my child? A: Connect with a nationwide network of PTA advocates and a wide array of influential individuals and organizations.

Customize the following graphic to fit your PTA message, name, and add your website and QR Code.



Our PTA Amplifies Your Voice

As part of a National association, your PTA membership supports child advocacy efforts in our community, our state, and

Our PTA

You should join our PTA because PTA amplifies your voice through collective impact. We can do more together than we can apart! When you belong to PTA, learn what you can do to positively impact students, families, and schools, as well as education programs and services. PTA advocacy helps you, your child, and all children because our PTA Connect with a nationwide network of PTA advocates and a wide array of influential individuals and organizations. Will you support our efforts by becoming a member?

JOIN our PTA by scanning the QR Code or going online at ...

See the complete details on creating your own custom messages with many more sample answers at [PTA.org-how-to-create-your-own-pta-value-message.pdf](https://pta.org/how-to-create-your-own-pta-value-message.pdf). Find it online at PTA.org. Under *Run Your PTA* menu, hover over *Membership*, and select *You Belong in PTA*.



YOU BELONG IN PTA



MEMBERSHIP RESOURCES & GRAPHICS

For the most current campaigns, tools, learning videos, documentation, and more, go to [PTA.org/home/run-your-pta/membership-resources](https://pta.org/home/run-your-pta/membership-resources). Download graphics from LAPTA at LouisianaPTA.org/membership.

COLLECTING DUES ONLINE WITH CHEDDARUP

Local PTA Units are strongly encouraged to use CheddarUp.com to create an easy website to collect member dues. CheddarUp.com is a site that allows a PTA to create a custom website to sell items, collect membership dues, upload documents, and include forms or information collecting. The account must be in the PTA's name under their EIN. CheddarUp also requires a personal Social Security Number to open an account, which must come from an authorized bank signer. This should be changed for future Boards. CheddarUp has spreadsheet reports that show detailed information on collections. All deposit transfers from CheddarUp must occur at least monthly directly into the PTA bank account and with a completed summary Deposit Form. The spreadsheet reports are compatible with Microsoft Excel or Libre Office which is free (libreoffice.com). To see a sample CheddarUp site, visit FriendsOfLAPTA.CheddarUp.com.

MONTHLY MEMBERSHIP CHALLENGES

LAPTA has a goal of 13,013 members for our 101st year in 2023-24. LAPTA needs the support of the Local PTA Units to help reach that goal! To be eligible for awards, all PTAs must have Active Affiliation status. The qualifying PTA units will receive recognition and automatically be entered into a **monthly drawing for \$100!**

August Early Bird Award

Submit 25 members by August 31 plus all Officers are registered at LouisianaPTA.org/register.

September Head Start Award

Jump start the PTA with 50% or more of the previous year's PTA membership total by September 30.

October Fall Into PTA Award

Before you trick or treat, submit 31 new memberships by October 31.

November Geaux PTA Award

File Active Affiliation Report and get more than 75% of previous year's PTA membership by Nov. 30.

December Lagniappe Award

Achieve 100% of previous year's membership and completed Active Affiliation Packet by December 31.

January Welcome Back Award

Keep up the momentum going with 10 new members by January 31.

February Founders' Day Award

In honor of PTA Founders' Day on February 17, add 17 new members by February 28.

March Madness Award

Make it a sweet sixteen by submitting dues for 16 new members by March 31.

ANNUAL MEMBERSHIP AWARDS

LAPTA has a goal of 13,013 members for our 101st year in 2023-24 and we need our Local PTA Units to help reach that goal! Qualification for awards is done without application. LAPTA uses the information on the top of the Excel Local PTA Unit Membership Report emailed to submit@LouisianaPTA.org by April 1, 2023. The annual membership awards will be announced at the General Membership Meeting on April 20, 2023.

Super Grower

PTA with the greatest increase from previous year.

Membership Marvel Award

Increase membership by 10% over the previous year average or reach your goal from LAPTA.

Golden Apple Award

100% membership of teachers and administrators.

Platinum One Voice for Every Child Award

Recruit members equal to 100% of student enrollment; All winners enter a drawing for two PTAs to **win \$500!**

Gold One Voice for Every Child Award

Recruit members equal to 75% of student enrollment.

Silver One Voice for Every Child Award

Recruit members equal to 50% of student enrollment.

MEMBERSHIP CALENDAR

July

- Make plans to attend summer leadership training with LAPTA.
- Meet with outgoing membership chair and new President and set goals for the new year.
- Develop a membership campaign and theme. Enlist the help of membership committee, board members and school principals to ensure a successful year. Consult the theme chosen by National PTA.
- Make plans to attend all Board meetings.
- Ensure that funds are in the budget for membership promotion posters, awards, prizes, and flyers.
- Have your plan of work approved by the Executive Committee.
- Prepare necessary materials for membership enrollment such as Welcome Packet (with President), envelopes, current dues report, current roster, and current awards form.
- Review all LAPTA awards and award applications and make appropriate plans for eligibility.
- Solicit business incentives or sponsorships.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

August

- Target the school faculty to join PTA before school starts. Give the faculty a summary of what PTA plans to do for them throughout the year and why they should join and support PTA.
- Attend LAPTA leadership training.
- Implement the membership enrollment campaign.
- Make sure every Board member joins PTA. They **must** be a member to be on the Board of Directors.
- Publicize! Use all media – email, Facebook, Instagram, Twitter, newspapers, billboards, radio, and TV.
- With the principal's approval, publicize the membership campaign by displaying posters in halls.
- Have the campaign materials ready for the first day of school and for registration.
- Secure lists of teachers and classroom counts from school secretary.
- Have enrollment tables for the first event that parents attend. Have plenty of change on hand.
- Use posters and artwork to keep noticeably displayed membership campaign progress.
- Keep a membership roster using the Excel spreadsheet at LouisianaPTA.org/membership.
- Send the treasurer all dues money as soon as it is received.
- August Early Bird Challenge:** Submit 25 members plus Officer Data at LouisianaPTA.org/register

September

- Get support from local officials such as the mayor, judges, or superintendents to join the PTA.
- Solicit support of faculty and room reps to keep the momentum going.
- Set up a membership table at open house.
- Continue to publicize membership in PTA.
- Update membership on progress towards goals.
- Review eligibility for membership awards.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- September Head Start Challenge:** Jump start the PTA with 50% of the previous year's PTA membership

October

- Work with program chairman and plan to have a parent education program to reach more members.
- Put articles in PTA, school, or community newsletters.
- Enroll parents, students, staff, bus drivers, grandparents, school board, community leaders, businesses, etc.
- Continue to publicize PTA and update members on progress.
- Give the school office extra Welcome Packets to give to new students when they enroll in school.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- October Fall Into PTA Challenge:** Before you trick or treat, submit 31 new memberships

November

- Continue to make personal contacts with parents and teachers who have not joined.
- Inform Local PTA Unit of progress toward goals.
- Set up a membership table at all PTA meetings and activities.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- Geaux PTA Challenge:** Achieve 75% of the previous year's membership

December

- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- December Lagniappe Challenge:** Achieve 100% of the previous year's membership
- Relax and enjoy the holidays.

January

- Kick off a new campaign.
- Continue to recruit new members and try to reinstate dropout members.
- Evaluate progress and plan any new approaches.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- Welcome Back Challenge:** Keep up the momentum with ten new members by January 31

February

- Celebrate National PTA's birthday on February 17.
- Invite new families to join. Continue to recruit members.
- Honor someone from your school with honorary Louisiana PTA Life Membership.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- Founders' Day Challenge:** In honor of PTA Founders on February 17, add 17 new members

March

- Remind the Treasurer to submit final membership dues by April 1 to qualify for state awards.
- Begin preparing Procedure Binder for the next chairman.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.
- March Madness Challenge:** Make it a sweet sixteen by submitting dues for 16 new members by March 31.

April

- April 1 is the deadline for Annual Membership Awards.**
- Attend the LAPTA Recognition Ceremony & State Meeting on April 20 to receive Membership Awards.**
- Evaluate the year's progress, make written recommendations for next year, and finish the procedure book.
- Work with incoming chairman to plan recruiting ideas for pre-registration events.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

May

- Celebrate your success. Breathe a sigh of relief and let go graciously. Thank you for a great job!
- Pass the procedure book and other records to the new Membership Chair.
- Submit dues at LouisianaPTA.org/membership. Share membership roster with President and Secretary.

HASHTAG AND EMAIL SIGNATURE

Use the *PTA For Your Child* hashtag in membership recruitment on social media to engage followers. Encourage members of the executive committee and PTA members to use the campaign hashtags in their own membership-related posts. #PTAForYourChild, #HowDoYouPTA



PTA For Your Child

Insert the following ***PTA For Your Child*** email signature into emails sent on behalf of the PTA. Hyperlink image to PTA registration page.

[NAME], [PTA LEADERSHIP POSITION]

[PTA NAME]

[PHONE NUMBER], [EMAIL ADDRESS]

How Do You PTA? PTA For All Children!

SAMPLE “MEMBERSHIP ASK” EMAIL

SUBJECT: PTA For Your Child!

Hello! It's time for another exciting school year to start and an important part of Madison High School is our PTA. MHS PTA supports critical academic needs, is an active voice on decisions that impact your child's health, safety, and quality of education, and builds a stronger, more inclusive school community. We invite you to join and ***PTA For Your Child*** because increasing our membership, even by one, makes it possible to do:

Mental Health Event

Literacy Program

Used Uniform Sales

Tutoring Program

There is no wrong or right way to be involved. Anything you can give, whether it's time or money, will support your child's potential. We invite you to join because we can do more together than apart. It only takes 5 minutes at PTA.CheddarUp.com.



Sincerely,

Beth Cleveland, Membership Chair

MHSPTA.membership@gmail.com

(555) 555-5555

#PTAForYourChild

How Do You PTA? PTA For All Children!

SAMPLE "MEMBERSHIP ASK" NOTE

MHS PTSA Membership Sign-Up

As we start another exciting school year, an important part of Mandeville High is **our PTSA**. We invite you to join and **PTA For Your Child** because increasing our membership, even by one, makes it possible to have:

- | | | |
|--------------------------|---------------------------|----------------------------|
| Mental Health Speaker | Campus Beautification | Staff Appreciation Lunches |
| \$25 Teacher Mini-Grants | Skipper Scholar Breakfast | Breakfast of Champions |

There are many ways to PTA. Anything you can give, whether it's time or money, will support your child's potential. We invite you to join because we can do more together than apart. Members of MHS PTSA are also members of **National PTA** and **Louisiana PTA!** For member benefits, see PTA.org. This form and dues may be submitted online at **Mandeville.CheeddarUp.com**.

MHS PTSA MEMBERSHIP

Student Name: _____	1 st Hour Teacher: _____
Adult Name: _____	Relation to Student: _____
Email: _____	Phone: _____
Membership Type: <input type="checkbox"/> Student <input type="checkbox"/> Parent <input type="checkbox"/> Grandparent <input type="checkbox"/> Staff <input type="checkbox"/> Business <input type="checkbox"/> Other: _____	
Adult Name: _____	Relation to Student: _____
Email: _____	Phone: _____
Membership Type: <input type="checkbox"/> Student <input type="checkbox"/> Parent <input type="checkbox"/> Grandparent <input type="checkbox"/> Staff <input type="checkbox"/> Business <input type="checkbox"/> Other: _____	
For Business Memberships, Business Name: _____	
Email: _____	Phone: _____
Address: _____	

C

Cash or check to MHS PTSA, or credit cards at Mandeville.CheeddarUp.com.

I'D LIKE TO VOLUNTEER FOR

- | | | |
|--|---|---|
| <input type="checkbox"/> General Volunteer | <input type="checkbox"/> Cultural Arts | <input type="checkbox"/> Student Care/Mental Health Program |
| <input type="checkbox"/> Lunchbox Spirit Wear | <input type="checkbox"/> Compass Weekly E-Flyer | <input type="checkbox"/> Skipper Scoop Newsletter |
| <input type="checkbox"/> Office Volunteer | <input type="checkbox"/> Hospitality | <input type="checkbox"/> Mental Health Committee |
| <input type="checkbox"/> Breakfast of Champions | <input type="checkbox"/> Library | <input type="checkbox"/> Parliamentarian |
| <input type="checkbox"/> Skipper Scholar Breakfast | <input type="checkbox"/> Membership | <input type="checkbox"/> Talent Show |

_____	_____	_____
Name	Phone	Email
_____	_____	_____
Name	Phone	Email

This form and dues may be submitted online at **Mandeville.CheeddarUp.com**. If you send in the paper form and payment, return to homeroom teacher.

SAMPLE THANK YOU EMAIL AND NOTE

SUBJECT: PTA For Your Child Thank you!

Thank you and congratulations! You are now a member of MHS PTSA, Louisiana PTA, and the National PTA. Check out **PTA.org** and **LouisianaPTA.org** for member benefits. Because of you, MHS PTSA will be able to support essential educational and curriculum needs, advocate on behalf of your child at the local, state, and national level, and build an inclusive school community for all families. Your PTA dues directly support Three-in-a-row Honor Roll Picnic, PBIS Buck Stop, Teacher Appreciation Luncheons, Library Literacy Program.

To stay informed, follow us on Facebook @MHSPTSA and join us on September 12 for our next PTA meeting.

There is no wrong or right way to be involved. Anything you can give, whether it's time or money, is an investment in your child. How will you PTA?



Beth Cleveland, MHS PTSA Membership Chair
MHSPTSA.membership@gmail.com
(555) 555-5555
#PTAForYourChild
How Do You PTA? PTA For All Children!

MHS PTSA Membership Thank you!

Student/Member Name

Congratulations! You are now a member of MHS PTSA, Louisiana PTA, and the National PTA. Check out **PTA.org** and **LouisianaPTA.org** for member benefits. Because of you, MHS PTSA will be able to support essential educational and curriculum needs, advocate on behalf of your child at the local, state, and national level, and build an inclusive school community for all families. Your PTSA dues directly support Three-in-a-row Honor Roll Picnic, PBIS Buck Stop, Teacher Appreciation Luncheons, Library Literacy Program.

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Beth Cleveland, Membership
MHSPTSA.membership@gmail.com (555) 555-5555 #PTAForYourChild

Include the Membership Card image posted at LouisianaPTA.org/membership.

PTA Leader Toolkit

2023 – 24

Section 7: Advocacy

LouisianaPTA.org/advocacy



LouisianaPTA.org

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INTRODUCTION TO ADVOCACY

In 1897 when Alice McLellan Birney and Phoebe Apperson Hearst decided that someone should speak out on behalf of children, they founded the National Congress of Mothers which later became PTA. For more than 125 years, PTA advocacy has resulted in many changes such as creation of kindergarten classes, child labor laws, public health service, juvenile justice system, mandatory immunization, and the school lunch program.

Today, PTA continues to advocate for all children, to press for adequate, equitable, and sustainable school funding, to create safe and healthy communities, and to make every child’s potential a reality. Become an advocate at the Local PTA or by joining Louisiana PTA and National PTA to add your voice to PTA’s one voice for every child. Advocacy is what makes PTA different from other parent groups. Each of us desires the best for our children. Reaching out to other children ensures that all children benefit from our efforts. Creating communities that are child friendly places promotes their health and wellbeing where they can prosper.

The *LAPTA Toolkit: Advocacy* will help guide the PTA to advocate at the local, state, and federal level. It includes tools to tackle an issue, plan out an advocacy campaign, and implement that plan, along with various tips and tools to help along the way.

GATEWAY TO ADVOCACY: WHY ADVOCATE?

Why Advocate? It is probably safe to say that no one first joins PTA to be an advocate. Most initially go to meetings and share their thoughts when the principal asks for ideas on an issue the school is facing. They help run an activity booth at the fall carnival to help raise funds to purchase items that teachers need in their classrooms. They talk to the child's teacher when another child was bullying them. They work a shift or two at the book fair because the school library would get extra books after the sale. They do these things because they want the child's school to provide the best education possible.

And in doing all these things, they were involved in advocacy, because at the most basic level, advocacy is simply working to make things better. Sometimes that involves speaking to someone with the power to make a change. Sometimes it is raising funds to support that change. By talking to the child's teacher about a problem in the classroom, they already know the basics of advocacy. Talk to the person who can change the situation, share what the problem is, and ask them to fix it (possibly with the solution). The approach is the same when advocating with a school board member, a state legislator, or a member of Congress.

The *LAPTA Toolkit: Advocacy* is designed to help the PTA become a more effective advocate, whether that advocacy is in the school, in the district, or at the state or national level. It will help to strategically attack an issue, recruit supporters, build coalitions of like-minded groups, structure the arguments, and communicate effectively. It will help to engage the PTA's members in advocacy and teach how to take advocacy success from the local level to the state or national level.

PTA was founded on the idea of advocating for children at school, in the home, and in their community. The Local PTA Unit has already been involved in advocacy, even if they did not call it that. Now, they can strengthen that advocacy. When PTAs advocate for change, they make things better not just for their child right now, but for every child going forward.

Top 5 Ways to Help Members Advocate for Children

1. Each time a parent attends a conference or communicates with the school, they are advocating for their children. Share PTA's Tips for Parent Teacher Conferences in the PTA newsletter, social media, or website.
2. Help educate voters by hosting a Candidate Forum. This forum can be the vehicle to provide information on where school board candidates stand on issues that affect children. Access National PTA's rules and regulations on political activities to following non-partisan IRS regulation for nonprofits.
3. Be part of the solution. Encourage members to become representatives on school committees and attend school board meetings. Work cooperatively with the school administration to educate the community and address the needs of the children within its confines.
4. Be the information conduit. LAPTA disseminates information on hot issues and pending legislation introduced in Baton Rouge. Share this material in a time sensitive manner with members.
5. A thousand is better than one. Promote membership! Every member adds to the strength of the PTA's voice as it supports issues that promote the well-being of children. The greater the numbers, the greater impact it can have. Advocating for all children helps them to achieve their dreams.

ADVOCATING AN ISSUE: PLANNING

Planning the approach to an advocacy campaign is like mapping directions to a new vacation destination. Create an advocacy campaign strategy by figuring out what a successful campaign looks like, what steps to take to get there, what resources are needed, what obstacles and opposition might occur, and what other groups can help.

One of the best tools to map out the campaign strategy is the *Strategy Chart*. A strategy is the overall plan, while tactics are the steps taken to achieve that plan's goals. A strategy chart consists of five columns:

1. **Goals** are what the advocacy campaign will ultimately achieve, as well as smaller goals along the way.

2. **Organizational considerations** are the resources the PTA can bring to the campaign including the people who do the work, the time to do each step, the creation of written materials, finances to cover expenses, and what the PTA has to gain from advocating.
3. **Constituents, Allies, and Opponents:** Constituents are the people who will be affected by the change being advocated for and who might join the advocacy efforts. Allies are those people and organizations outside the PTA who are already involved in advocacy on the issue or who may be persuaded to join the efforts. Opponents are those who will push back against the advocacy efforts.
4. **Targets (decision makers)** are always people and not an institution or elected body. Each person needs a separate strategy chart. Primary targets are those people who can directly give what the advocacy campaign is asking for. Secondary targets have influence or power over the primary targets.
5. **Tactics** are the actions taken to implement the advocacy strategy to persuade each of the primary targets to take the desired action. Each tactic should be directed at a specific target, backed with a form of power such as “I am a voter in your district,” and make sense to the members. Examples of advocacy tactics are letter/email campaigns, social media campaigns, letters to the editor and op-ed pieces, meetings with decision makers, media events, press releases, public hearings, non-partisan voter registration and education campaigns, and non-partisan candidate forums.

Advocacy Strategy Chart

GOALS What do you want to achieve?	ORGANIZATIONAL CONSIDERATIONS Resources, skills, gains & needs	CONSTITUENTS, ALLIES & OPPONENTS Who in PTA cares? Outside organizations? Who will fight you?	TARGETS Who can make the desired change? Who can influence them? (Always a person)	TACTICS Applied to the targets to get them to make supportive decisions to reach the goal.

SETTING GOALS

A critical step in planning an advocacy campaign is setting goals. These goals inform all of the work on the advocacy campaign. Ask questions to decide what the goals are:

- What is the desired result of the advocacy?
- Who are the decision makers to make that happen, and what do they need to do specifically?
- How will success be measured? What counts as a victory?
- What steps along the way to the goal can be identified and celebrated?

Long-term goals should reflect the overall objectives from the advocacy efforts. **Intermediate goals** should reflect victories that are along the way to achieving the long-term goals. These goals are important to set because they can help to re-energize the advocacy team and bring in new supporters by showing early progress toward achieving the long-term goals. **Short-term goals** are the steps needed to reach the intermediate goals and are often easily achieved. They generate positive momentum to reach the long-term goals and encourage others to get involved.

RAISING PUBLIC AWARENESS

Sometimes advocacy efforts are focused just on educating the community about an issue if most people are unaware of it. Advocacy campaigns need to raise awareness in the community about an issue. Raising public awareness requires a concentrated effort to educate the community in as many ways as possible. Form coalitions with other organizations that agree with the PTA on the issue. Here are some ways a PTA can raise public awareness:

- Host a public forum on the issue with local experts, business leaders, local politicians, parents, and students.
- If the school district has a committee focused on the issue, ask for the PTA to have a seat on the committee to represent the voice of families in the district.
- Use the public comment period of school board meetings to bring awareness to the issue. Be aware that many school boards limit public comments to two or three minutes.
- Provide educational materials as part of voter information. The PTA can do non-partisan events like hosting candidate forums, providing voter information on how all the candidates stand on issues, and providing voter scorecards on how incumbents previously voted.
- Use public media to build awareness on an issue, including letters to the editor, op-ed pieces, public service announcements (PSAs), local radio call-in shows, TV news public interest pieces, and local community access channels.
- Use social media. Have a memorable hashtag. Develop a selfie-focused campaign with people sharing why they care about the issue (and have them tag their friends).

CONDUCTING CANDIDATE OR ISSUE FORUMS

Candidate or issue forums are a great way to engage communities in advocacy and to provide information needed to make informed and responsible choices when voting. The goal is to provide information directly from the candidates about their positions on a variety of issues so that voters can make an informed, responsible choice when voting. In an issue forum, PTAs should remain neutral unless their voting body has given permission to take a specific position. In this way the PTA is a relevant resource for families and communities and helps individuals become informed advocates for the education and well-being of all children.

What Is a Forum? A forum is a public meeting or assembly for open discussion. At a candidate forum, speakers answer questions directly from audience members, panelists, or a moderator, but do not directly engage with each other. Speakers may be on stage simultaneously or at separate times. If the format requires a moderator, consider a neutral person who is not associated with a political interest group. Organizations such as The League of Women Voters, American Association of University Women, or other community groups familiar with the issues and candidates may be better qualified to ensure the forum is noncommercial, nonsectarian, and nonpartisan. PTA does not participate in candidate nights, forums, or voter awareness programs with organizations that endorse candidates. The purpose of forums is to inform the public and help voters make informed decisions; allow the public to hear the candidates discuss important issues; provide candidates with information that concerns their constituents; get candidates on the record so they can be held accountable for their stated positions on issues; allow the candidates to get their message out to the voters; and provide an important public service.

There are various types of forums that the PTA can hold to address the needs of the PTA and community members. Below are a few of the common types of forums that PTAs conduct:

- **School Board Candidate Forum:** Local school board elections are nonpartisan. The PTA can hold a forum to allow the community to hear from and ask questions of the candidates. Prepare questions ahead of time for each candidate to answer and possibly allow questions from the audience. All candidates must have equal opportunity to answer each question with a limited response time. Treat all candidates the same

particularly since many school board members have come from the local PTAs. Remember that PTAs support or oppose *issues*, not candidates!

- **City Representative Candidate Forum:** The PTA may hold a candidate forum to discuss the issues important in the community. Follow the same guidelines offered in the school board candidate forum. When hosting a forum on an issue of concern in the community, it may be more effective if it is a joint venture with another association or group. Also, many communities use social media to voice their concerns and to share information. Become a part of these networks to engage the PTA community. Remember that PTAs support or oppose *issues*, not candidates!
- **Ballot Issues Forum:** To host a forum for a ballot issue, form a panel of approximately five people who are knowledgeable on the subject, preferably some for and some against it, who can answer questions on the ballot issue. The PTA may want to consider having one person from the school board, one administrator, one community member, and two others to be identified by the PTA. Consider inviting a local state legislator to be on the panel, as well. The PTA might want to skip the gathering of questions ahead of time and go strictly with questions from the audience. If the PTA uses this approach, have a couple of PTA volunteers to screen the questions from the audience so that the same question is not asked repeatedly. Screeners can also filter out confusing, poorly worded, and inflammatory questions. Give each panelist five minutes or less to introduce themselves and to speak on the ballot issue which allows the audience to know who they are ahead of time.
- **Bond Elections Forum:** A school district might want to issue bonds to fund district needs that cannot be met merely by the tax dollars for public schools. The issuance of the bond must be approved on a ballot by the voting public. PTAs can be very helpful by working with the school district to conduct information sessions on the bond issue. Local PTAs can take a vote at their local level and take the position of the majority on whether to support the bond election or not. PTAs may publicly demonstrate their support through their usual communication channels, including the posting of yard signs, buttons, t-shirts, etc.
- **Boundary Changes Forum:** PTAs can facilitate a forum to learn about proposed school boundary changes. If the PTA is unable to conduct a forum, formulate a questionnaire that can be completed by school district personnel and send it to the local newspaper with the school district's responses. Remember to keep it nonpartisan, nonsectarian, and open-minded as this is a way to help the membership become knowledgeable and make informed decisions during election time. Get LAPTA's approval of the questions to be presented.

How to Conduct a Candidate/Issue Forum

1. Form an Interview committee that will compose and send a questionnaire to each of the candidates. They will conduct follow-up, in-person, or phone interviews and inform the candidate on how the information gathered from the questionnaire or interview will be shared. The interview questions and format should be the same for each candidate. Interviews should be held in a non-threatening environment such as a library, meeting room, or other public building. Do not conduct committee meetings in any place that may imply a position other than noncommercial, nonsectarian, or nonpartisan. For example, do not use a place of worship or elected official's office.
2. Schedule a candidates' night or public forum alone or with other organizations interested in public education who do not endorse candidates. A candidate cannot be asked to sign a pledge on any issue.
3. Have a Get Out the Vote, PTA Votes, or mock student/parent election campaign to encourage voters to head to the polls. Consider using postcards or emails. Provide information on when voting takes place, locations of the polls, hours of voting, and the parish election office phone number. A PTA could offer transportation options to those needing a ride to the polls. PTA can educate and encourage members to vote. However, they cannot ask members to vote for a particular candidate or party.
4. Announce all forums, candidate nights, etc. in the local papers by placing flyers in the community and on local radio or TV stations. Search online for a list of local media. If the PTA or school district has a website, make sure to publish announcements there and include that website address on all publicity.
5. Notify LAPTA about the forum. LAPTA will notify other PTAs of the event who might attend, observe, learn, or team up with the PTA.

Questionnaire Format for the Forum

The written questionnaire might consist of ten to fifteen questions for the candidate to complete and return prior to the interview or forum. Five to eight questions could be selected to be asked at the forum. Consider questions that are relevant and pertinent to the school district. As attendees register for the candidate forum, give them an index card on which they may write the question(s) they wish to ask. A committee of forum planners should weed out duplicates and inappropriate questions. Use the most relevant questions to form the oral interview questions for the forum.

FORUM TIMELINE

60-90 Days Before Forum

- Set a date for the forum. Considered if the forum will be just before early voting or just before election day. Find out if any other organizations are hosting forums.
- Secure a location to hold the forum and reserve the room or building. Ask whether there will be someone there to open and close the facility and who will set up the tables, chairs, podium, and microphones.
- Get a neutral person to be the moderator for the evening. Make sure they add the forum date to their calendar. Send the moderator a confirmation letter.

45 Days Before Forum

- Solicit questions from PTA members and community members who have an interest in public education.
- Set up a meeting time to finalize which questions will be asked.
- Send an invitation letter to each candidate containing the format of the forum, candidate biographical information, and confirmation that they will attend the forum.
- Email a letter to the principal or the venue's point person confirming equipment arrangements.

30 Days Before Forum

- Hold a meeting to finalize questions. Designate two or three timekeepers (one to operate the stopwatch, one to hold the yellow banner, and one to hold the red banner). Designate who will host the evening and introduce the moderator. The moderator can introduce the candidates. Designate usher or pagers to greet people at the door, to hand out the candidate biographical data sheet, and to hand out and collect index cards for the audience's questions.
- Send out media releases to newspapers and radio and television stations informing them of the date, time, and location of the forum. Ask them to publicize as much as possible. Utilize email and other social media to spread the word about the event.
- Mail 15 questions to the candidates and perhaps a newspaper reporter that covers the school district.

7 Days Before Forum

- Send reminder email.
- Gather up a stopwatch, yellow and red banners, bottles of water for candidates and the moderator, index cards and pencils, and name place cards for each candidate and the moderator.

Day of the Forum

- Send reminder email.
- Get room or facility ready, including making sure microphones are working properly.
- Arrive an hour before the forum start time to ensure that the facility and equipment are appropriately placed. Lay out name place cards, bottles of water, index cards, and pencils.

After Forum

- Help clean up the room.
- Send thank you letters to the moderator, the participating candidates, the principal or venue contact, the custodian, and all volunteers.

IMPLEMENTATION: DEVELOPING YOUR MESSAGE

The core of the advocacy campaign is *communication* with the PTA members, potential supporters, and the targets. Each audience needs a message tailored to their situation. Therefore, it is critical to effectively craft the message.

Creating a Message Box

Once the issue is researched and the campaign strategy completed, it is time to carefully craft the message. Create a “message box” that will help prepare what the PTA needs to say and how to respond to any opposition. In creating the message box, fill in these four quadrants:

What PTA Says About the Issue	What Opposition Says About the Issue
What PTA Says About Opponent’s Position	What Opposition Says About PTA’s Position

The completed message box helps to frame all messaging during the campaign. A consistent message is essential. PTA members are likely to be tired of the message long before it begins to sink in with the decision makers and the community. Also keep in mind that the message box may need to be updated as the opposition crafts different arguments to the message. The message may need to respond to those updated arguments but keep a consistent focus on the goal.

Creating a Message

In crafting a message, start with a long argument supporting the position or a list of talking points. Then cut it down to a focused message, to an elevator pitch, and to a hashtag. Refer to the “Five Cs of Messaging”:

1. **Clear:** Focus the message on two or three simple, easy-to-understand points that address the problem and the solution.
2. **Connect:** Make sure the message connects with the audience and the PTA’s values.
3. **Compelling:** The message should make the audience care about the issue. Personal stories that illustrate the problem or how the solution has worked elsewhere can help make a compelling message.
4. **Concise:** The targets are likely busy people, so put what is being asked of them to do right at the beginning of the message before adding supporting information.
5. **Continual:** Keep the message consistent and keep it in front of the audience.

Framing the Message

Framing the message simply means focusing on the problem in a specific way to highlight the need for change. Consider what stories can be told about the issue and its importance. What stories highlight the problem? What stories illustrate a way to the solution? What stories will make the targets care about the issue? Most people inherently want to help children. Focus the advocacy message on how it affects a single child and how to tell that child’s story.

Different Types of Messages

Throughout the advocacy campaign, a variety of messages will be needed. While the message may be tailored to a specific audience, keep the advocacy goals front and center in every message. Different messages might encourage the PTA members to act, raise awareness of and educate people about the issue, tell decision makers which action to take, encourage counter opposition to the advocacy, and share the successes along the way to encourage more people to join in the PTA’s efforts.

THE VOICE OF MEMBERSHIP

A Resolution is an original main motion which is submitted in writing because of its importance, length, or complexity. Resolutions call for action by its constituent bodies. They seek to address problems, situations, or concerns that affect children and require action for a solution.

A Legislative Position is a statement outlining the opinion, will, or intent of the PTA to address statewide problems, situations, or concerns that affect children. A position statement usually requires initial action to seek resolution on the issue. Sometimes the position is maintained to substantiate the continuing will of the PTA.

Local PTAs can propose new resolutions or legislative positions to LAPTA. LAPTA considers all submissions, biannually, upon the recommendation of the Advocacy Committee. Submissions must be received by LAPTA by November 15 in odd numbered years. The criteria for consideration are does it further the mission of the PTA, align with National PTA and LAPTA policies and are noncommercial, nonpartisan, nonsectarian; concern a matter of national or state scope, not merely local interest, request action that is feasible for LAPTA to undertake, have the support of the submitting PTA, and state a position not previously adopted by the LAPTA?

To submit a resolution to LAPTA, use a cover sheet signed by the submitting PTA's President and Secretary. Indicate the date on which the proposal was adopted by the membership of the submitting PTA, state the resolution or legislative position language, include a table of contents for supporting materials, and have a rationale statement (one page or less) summarizing the issue and the need for the requested action. Use background materials to document each "whereas" clause in a resolution or each statement in a legislative position. This material should indicate that the subject was well-researched by the submitting PTA and should be sufficient to give a person with no previous knowledge of the subject enough information to make an intelligent decision. The material must be unbiased, well-balanced, and may include PTA related information, such as statements or policies, copies of document research, pertinent laws, surveys, statistics, or copies of relevant articles from publications. Newspaper articles and editorials alone are not sufficient background material.

A PTA wishing to propose an **emergency resolution or legislative position** must submit the proposal to LAPTA by June 15 in even-numbered years. To be eligible for emergency consideration, the issue must have arisen after the November 15 submission deadline. If approved by the LAPTA Board of Directors, a two-thirds affirmative vote of the delegate body is necessary to consider the emergency item.

USING THE MEDIA

Whether campaigning to raise awareness of an issue, educate about an issue, or advocate for change, the media provides the best opportunity to get the message in front of the most people. Consequently, include a media plan in the advocacy campaign.

Using Different Types of Media

Each media platform has its advantages and disadvantages. Spread media efforts across as many platforms as possible, since they often reach different audiences.

- **Newspapers:** Local newspapers are a great way to get the message in front of the community. Daily papers can be useful through letters to the editor, op-ed pieces, articles by reporters, and meetings with the editorial board. Weekly papers are often locally focused and might run a press release word for word.
- **Radio:** There are very few locally focused radio news stations, but some local stations may have call-in talk shows that can be a good way to get an issue out to the public.
- **Television:** TV news tends to focus more on visual-oriented stories, so think of ways to present the issue visually for TV coverage. Some options might be a walkthrough of a school to illustrate needs. Keep in mind that while a TV reporter may do a 5 or 10 minute interview for a story, they are likely to only use 30 seconds of it in the story. Make sure to bring every question around to the key points.

- **Social Media:** Social media can be a blessing and a curse. It provides an opportunity to reach a broad audience, engage people in advocacy, and energize younger groups that might not see any other media. However, it is also possible to have a strong backlash on social media often from people not in the community and especially if someone with a large following shares a post. Going viral can cut both ways. Make sure the social media messages have a consistent and easy-to-use hashtag and a consistent graphic identity. Be prepared to engage with some replies to posts but remember not to feed the trolls. The mute and block tools are there for a reason, and do not be afraid to use them.

Activities that Generate Media Interest

Media coverage can be a long-term effort. Learn who covers education issues at the local paper, radio station, or TV station. Follow them on social media to see what types of stories they cover and what their editors are printing or airing. When pitching stories, be sure to emphasize the local angle and the importance of the issue to the community. Think about the potential visual aspects of the story as even getting just a picture and caption in the newspaper can help with the advocacy campaign. Inform the media of any events several days in advance through a press release. Some activities that generate media interest are school board or other candidate forums, PTA events that involve kids doing something related to the campaign, picketing with educational handouts, and press conferences ideally about the advocating issue. The best time for press conferences is Tuesday through Thursday between 10 am and 2 pm which allows reporters to get their story ready for evening news programs.

HOW TO WRITE A PRESS RELEASE

Use a press release to contact multiple media outlets. There is a specific format for a press release with numerous examples online for formatting guidance. Refer also to National PTA's online press releases which are good examples of content. At the top left of the page, put the name and contact information for the person reporters should reach out to for further information. At the top right of the page, put "FOR IMMEDIATE RELEASE" (typically in all caps and bold). Below the contact information, place a headline that quickly summarizes what the press release is about, centered on the page, and in bold. Make sure the headline stands out by using action verbs, be specific, and keep it short. If needed, use a subheading in italics below the headline.

Keep in mind that newsrooms get dozens or hundreds of press releases every day, so make sure the headline is compelling. Make sure the most important information is right at the top. The first paragraph should cover who, what, and where. The second paragraph should cover the why. These two paragraphs should cover all crucial information. Beyond the first two paragraphs, add a quote from the PTA president or a PTA family, share non-critical information, and provide a summary of what the PTA is. Try to keep the press release to a single page. At the end of the press release centered on the page, put "###" or "-30-" to signify the end of the release.

SAMPLE THANK YOU LETTER TO A LEGISLATOR

Be sure to thank every legislator (or any other decision maker) after meeting with them. This is an opportunity to reinforce the advocacy message, provide additional information, and answer any questions not answered during the meeting. It can be email but never underestimate the power of a handwritten note. If the meeting was with a staff person rather than the legislator, be sure to mention them by name in the thank you. If the staff person was helpful, courteous, informative, etc., mention that as well as the legislator is likely to mention it to the staffer. A good relationship with a legislator's staff is as important as a good relationship with the legislator, especially since the staff are likely to be the ones setting up meetings, reading emails, and putting calls through to the legislator. Replace the bracketed text below with the proper items.

Dear [Senator/Representative] [Last Name],

Thank you for taking the time to meet with [me/us] on [date] regarding [issue]. As requested, here is the additional information I mentioned in our meeting. [Answers to questions or further information.] I hope we can count on your support for [issue], and I look forward to speaking with you again in the future.

Sincerely,
Signature
[PTA Name, Position]

ADVOCATING WITH YOUR SCHOOL BOARD

When starting an advocacy journey, it is common to feel nervous. The local school board is a common place to start. Local PTAs want school board members to know their PTA leaders and members as a useful and knowledgeable resource when it comes to matters that concern students and their schools. Developing this relationship is done in a variety of ways, such as regular attendance at school board meetings and understanding the role of an elected school board member. Virtual school board meetings make it easier to become familiar with how the school board works and to stay aware of the current issues. When advocating with the school board, remember that public comments might only be allowed during a public comment period at the beginning of the meeting and not while an agenda item is being discussed. Be aware of how the school board handles public comments. Public comments are limited by time, so know how long the school board allows which is usually two or three minutes. Board members listen, but generally do not respond to public comments when they are made although they might ask a question to clarify a comment. To discuss an issue with school board members, it is best to do it one on one.

Using the School Board Public Comment Period Effectively

Because public comment time is limited to a couple of minutes, it is important to use this time wisely. If several points need to be made, it may be helpful to divide those points between different speakers. In those cases, limit the number of speakers in the interest of time and make sure none of the comments overlaps with what others are saying. Here are some other tips on commenting at school board meetings:

- **Prepare and Research:** Review the PTA meeting minutes and the school board meeting minutes and website for information pertinent to the planned comments. Check the PTA's source of information with the school district's source of information. School board policy requires transparency of information and is an excellent resource for financial, academic, operations, human resources, communications, and school board information. Check the district's public participation policy to know when the public may speak during a meeting. It might be once or twice during the meeting and might have an "agenda item-only requirement" for one of the two public comment options.
- **Organize thoughts:** Outline the key points and start by explaining to the board members what the issue or concern is. Allow listeners to focus on the message by knowing ahead of time exactly what will be thanked, what needs clarification, or how the PTA disagrees. Use a person who is comfortable speaking publicly. Write the statement down and then read it directly during the comment time. Having it printed out in a way that makes last-minute changes easy to do. If using a tablet, iPad, or smartphone, be sure it is easily accessible and charged. It is easy to lose one's place when scrolling through a document, so consider saving it as a PDF and use a large font to make it easy to read.
- **Practice:** The speaker should state their name and the associated school. They should read the public comment out loud and practice speaking slowly with emphasis on important aspects of the message. They should not raise their voice, use sarcasm, be dismissive of others, denigrate members of the administration, or speak negatively about the school's principal, administrators, faculty, or staff. (If it is a problem related to a staff member, that issue should be raised in private with the principal of the school, with the assistant superintendent for that area, or the superintendent once all avenues have been tried.) Watch the time. If one or two sentences remain when time is up, ask the board president for another minute to finish.

ADVOCACY AWARD FOR LOCAL PTA UNITS

Application Deadline: March 1, 2024
Winners Announced: April 20, 2024

Apply at: <https://form.jotform.com/221794928286067>
Quantity Offered: 2

Local PTAs can apply for the Outstanding Advocates for Children (OAC) or Be the Voice (BTV) advocacy awards. Submit materials and documentation of the completed advocacy work **online by March 1, 2024**. Winners are announced on April 20, 2024 at the Recognition Ceremony.

Entry information includes Local PTA Name, LUR#, parish, and PTA contact's name, email, phone, and PTA position. Documentation of the advocacy work is uploaded, as well.

To be eligible for Outstanding Advocates for Children (OAC) Award or the Be the Voice (BTV) Award, Local PTA Units complete some of the *Building Awareness Activities* and some *Civic Engagement Activities*. The number of completed activities determines if the PTA is eligible for the 1st Place OAC Award or the 2nd Place BTV Award. The below lists are only suggested activities. There are countless ways a PTA can advocate! **Attach information or documentation of each advocacy activity when applying for the award.**

Building Awareness Activity suggestions are:

- Educate and communicate LAPTA legislative issues through social media, newsletters, programs, and other avenues to PTA members and the community at large.
- Share advocacy updates and information from LAPTA and how to sign up for the LAPTA newsletter.
- Share LAPTA advocacy alerts to membership.
- Host programs or family events. Pick a legislative priority topic and build a community event around that issue. For example, invite guest speakers, discuss topics, and have a related activity.
- Collaborate with other local PTAs.
- If appropriate, seek community partners and other association relationships to elevate your work.

Civic Engagement Activity suggestions are:

- Write letters or postcards to share your concerns or support regarding LAPTA legislative issues.
- Make phone calls to elected officials in response to LAPTA Legislative Alerts.
- Meet with legislator or legislative staffer to discuss LAPTA legislative priorities. Collaboration with other local PTAs is encouraged.
- Give legislators school tours to meet students, parents, counselors, teachers, and administrative staff. Discuss how PTA legislative issues impact your campus and community.
- Attend an event at the Louisiana State Capital.
- Attend other forums pertaining to public education, child health, and child safety that align with PTA's goals.



Submit application online at <https://form.jotform.com/221794928286067> or scan the QR Code by March 1, 2024. Winners will be announced on April 20, 2024.

ADVOCACY AWARD FOR STUDENTS

Application Deadline: March 1, 2024
Winners Announced: April 20, 2024

Apply at: <https://form.jotform.com/221794914529163>
Quantity Offered: 2

LAPTA accepts applications for the Student Advocacy Award to recognize students who help to truly enhance public education. Students who are involved with civic engagement at an early age are the pillars of Louisiana's future! The Outstanding Advocates for Children (OAC) Award is the 1st Place award, and the Be the Voice (BTV) Award is 2nd Place award. Submit materials and documentation substantiating the completed advocacy work online.

Entry information includes Local PTA Name, LUR#, parish, student's contact information, parent's contact information, and PTA contact's name, email, phone, and PTA position. Documentation of the advocacy work is uploaded, as well.

Suggestions of Civic Engagement Activities are:

- Sponsored voter registration drive.
- Hosted voter education program.
- Hosted a program or campaign about a LAPTA legislative priority issue.
- Met with legislators representing student's school community.
- Created an online candidate questionnaire regarding PTA legislative priorities.
- Other community engagement.



Submit application online at <https://form.jotform.com/221794914529163> or scan the QR Code by March 1, 2024. Winners will be announced on April 20, 2024.

PTA Leader Toolkit

2023 – 24

Section 8: Diversity, Equity, & Inclusion (DEI)

LouisianaPTA.org/dei



LouisianaPTA.org

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INTRODUCTION TO DEI

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. Diversity, equity, and inclusion supports every child with one voice, no matter their race, ethnicity, zip code, income, gender identity, sexual orientation, immigration status, or abilities. LAPTA recognizes that advancing diversity, equity, and inclusion is an integral part of PTA’s work and its vision of making every child’s potential a reality. *LAPTA Toolkit: Diversity, Equity, and Inclusion* is a resource for PTA leaders to develop and advance their diversity, equity, and inclusion plans and programs in their school and community.

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 system, national origin, and political beliefs.

Equity is the fair and impartial treatment, access, opportunity, and advancement for all individuals considering systemic inequalities and outcome disparities within society.

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.

To best serve all students, PTA leaders should become familiar with the demographics of their school and community. This includes enrollment data by gender, ethnicity, disabilities, economic disadvantage, English language learners, migrants, homelessness, and foster care. To access additional specific data, request information from the school or district administration.

PROMOTE DIVERSITY IN THE SCHOOL

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, PTAs are well-equipped to foster the principles of diversity, equity, and inclusion in their schools and community. Diversity is the strength of PTA! Those who are intentional in their DEI efforts are most likely to experience great outcomes that benefit all children and their families rather than just isolated patches of success.

A great place to start DEI work in the school is to establish PTA as a sanctuary for all families to gather information, express opinions, concerns, and needs, and feel heard and embraced. PTA can be a resource empowering those traditionally less likely to be engaged in their children's learning and well-being by organizing parent or guardian training and events and by sharing information on relevant topics. Analyze the level of diversity, equity, and inclusion in the PTA's membership, governance, programs, and advocacy efforts. Identify areas of success and other areas in need of more work. Set goals and action plans to address each of these areas.

Form a DEI Committee with clearly defined charges and goals that are periodically reviewed and updated. 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 the PTA or participate in meetings and events. To achieve successful outreach, learn about other cultures, traditions, challenges, and restrictions of the groups needing outreach.

Address issues that matter the most to those needing engagement. Ensure PTA's advocacy efforts represent all children including those typically marginalized and those whose families may not be equally engaged. PTA's advocacy initiatives must be non-political and non-biased. Create a welcoming environment for conversations considered difficult and with a clear understanding that not all members agree on everything, but they must agree to uphold PTA's mission and values. All must agree on the collective goal to serve and to keep all children safe. Engage in ongoing meaningful conversations with school and district administration, school boards, and other stakeholders that recognize the principles of diversity, equity, and inclusion in all decisions.

In the constant efforts to seek new volunteers, PTA leaders are encouraged to recruit leaders from under-represented groups. Consider the whole person such as individual interests, passions, expertise, color, gender, cultural background, or spoken languages. Recruiting people in areas of PTA work that they are passionate about and interested in is more likely to set them up for success and encourage them to grow as leaders. Recruitment does not end with identifying individuals with leadership qualities. It is important to set them up for success and offer support while providing them with the space needed to put their own personal stamp on their work. Establish fair and equitable practices in all areas of PTA's work, including decision making, nominations, elections, appointments, participation, events, topics, and services. Such practices establish trust and respect for the organization as a whole and its leadership.

Have all PTA meetings and events reflect a welcoming and inclusive environment for all. Most importantly, if leaders are reminded of PTA's mission, vision, and core values as the focus and purpose of all PTA work, they are on the right path to applying the principles of diversity, equity, and inclusion. Refer to *How to Hold an Inclusive PTA Meeting* and *How to Organize an Inclusive PTA Event* later in this section.

HOLD AN INCLUSIVE PTA MEETING

When scheduling PTA meetings and times, consider possible conflicts, religious holidays, and work limitations that might prevent some from attending. Possibly alternate days of the week and times of the day. Meetings could be held at two times in one day, such as 11:00 am and 7:00 pm. Survey the school community to find best ways to reach most families.

Assure your meeting location, restrooms, and other needed facilities are accessible to all attendees. A location easy to find makes for prompt arrivals of attendees. Use signage that is clear and legible to all. If the meeting is outside the school, consider locations that are near public transportation and have ample parking.

When publicizing the meeting, consider digital access limitations when sending out fliers electronically and provide printed notice when needed. Ask teachers to include a reminder on the day of the meeting when children write their homework in their agenda planners. Send it out by email and post on the PTA website, Facebook page, and other social media platforms. Ask room parents to reach out to their rosters. Have handouts with all monthly meeting dates at school and PTA events. Assure digital and paper fliers are sent in all spoken languages in your school. When using any electronic translation such as Google Translate, try to have a native speaker proofread the translated flier for accuracy.

Thoughtfully set up the meeting space. All those who attend should be able to have a good view of speakers, screens, etc. so that all attendees are able to see, hear, and engage with each other. Have all handouts and sign-in sheets near the entrance and easily accessible. Consider seating arrangements that make everyone feel equally engaged and significant rather than classroom style or the PTA Board facing the audience. Board members, when possible, can spread throughout the space to mingle and meet other members. When holding a virtual meeting, confirm microphones are placed in locations able to pick up the voice of anyone speaking so those attending virtually can hear them.

For the meeting environment, leaders need to be open-minded, presentable, and approachable, making others feel comfortable. Always realize the significance and responsibilities of leadership roles and how they can impact perceptions and recruitment of members and future leaders. Consider PTA Board members taking turns greeting attendees as they arrive at meetings. 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. Correct pronunciation of names is more than a common courtesy. It is a significant sign of caring and inclusion. Consider having crayons, coloring books, and activities for children accompanying their family members to quietly entertain themselves. Adhere to the meeting agenda, lay the ground rules at the start of the meeting, and treat all with respect and consistency. Allow opportunities on the agenda for feedback and attendee engagement when appropriate, making it clear to all that their suggestions are welcome. Avoid terms that may offend others. When holding a virtual meeting, assign someone to check and address the chat.

If food or beverages are provided, proper sanitary precautions need to be observed. Be sure to take into consideration dietary and religious restrictions as well as food allergies. Provide clear and accessible packaging information and ingredients for those purposes. Serving tables should be accessible to all attendees.

Finally, collect contact information and follow up regarding topics or issues that need to be addressed later. Unless people feel heard, they are unlikely to return to future meetings. Reach out and thank any newcomers. Remember the first time going to a meeting or doing something outside your comfort zone? Make the effort to engage and follow up to create lasting relationships and future leaders!

ORGANIZE AN INCLUSIVE PTA EVENT

Advertise PTA events through all possible electronic methods, social media, print, mail, and school backpack. Assure event fliers and invitations are translated into all languages spoken in the school community. Avoid communication and participation barriers to ensure that all attendees can participate regardless of their spoken language or physical/mental abilities. Provide clear and transparent explanations of all PTA events and activities, especially to first timers not familiar with the customs of the PTA. The better informed and prepared everyone is, the more comfortable they will feel and the more likely they will return.

Anticipate potential needs that participants might need to attend and take part in the event, such as transportation, directions, time commitment, special accommodations, material, or electronic devices. Support remote platforms providing virtual options such as Zoom and Google Meets when possible. They present great opportunities for families with time restraints and travel or accessibility challenges.

Consider holding certain events at locations other than the school building, taking the event to the people you seek to engage. Alternate locations so everyone can feel important and embraced. Provide calm or quiet spaces if the event has the potential to be loud or filled with excitement. Sensory overload affects many people, young and old. Make sure to advertise that these spaces are available on your communication materials. Consider holding “Sensory Friendly” events like a Bedtime Book Reading family engagement activity or by limiting the number of families who can attend an event and offer more of those events. Utilize icebreakers (see *Icebreakers* later in this section) at the start of events as they present a great tool to put everyone at ease.

Consider inclusive, culturally sensitive, and diverse topics and speakers and invite others to make suggestions for topics they would like to see addressed. Food, beverages, giveaways, and prizes can be utilized as attractive incentives for participation. Families with children are more likely to attend and stay through events that feature fun and engaging activities for children of different ages and abilities.

Your PTA’s DEI Committee can plan a school or district-wide DEI event that promotes diversity and inclusivity through themes, messages, and activities. Celebrate differences! Promote and organize events where all groups can educate others, share information, and advocate for themselves. Connect and collaborate with community-based organizations that share a focus on diversity and inclusion. Engage in active and two-sided dialogue, allowing for opportunities for all stakeholders to express their opinions and needs and those organizing the event, not only speaking, but actively listening and following up.

In addition to families, be sure to invite teachers, school and district administrators, staff, and community partners to PTA events. Building strong connections with all groups assures good relations and positive outcomes for children and families. Organize events that develop positive relationships between teachers and families to help overcome cultural barriers that interfere with active family engagement in children’s education and schools. Plan PTA events that help level the parent/family education field and close the information gap that may hinder family involvement in their child’s education. Events may include family math or science nights, technology, child development topics, and college or career prep and funding, to name a few.

ICEBREAKERS

An easy way to promote inclusion at PTA meetings is to encourage members to interact with each other. Including an icebreaker at PTA meetings is a fun way to get people acquainted and to feel included. It's a great way to start meetings, encouraging engagement and meaningful introductions before diving into business. To pick an icebreaker, ask what the *main goal* is with the ice breaker. Determine if the goal is to help people get to know each other better, to inspire some fun competition, or to have people learn something new. Consider how the ice breaker is *inclusive*. Keep in mind that participants might have different abilities, interests, and beliefs. Make sure it is accessible and does not exclude anyone from actively participating. Think about how the ice breaker is *interactive*. Ice breakers are a great way to help people mingle and step out of their comfort zone. Plan an ice breaker that helps participants spark new connections and relationships. Here are some suggestions:

What Do You Love: Each person states one thing that is non-PTA related that they love. Then others who also love the same thing raise their hands or otherwise gesture.

Culture Club: Participants break into small groups and pick three areas of their families' cultural values from a list that includes traditional food, typical dress, acceptable/unacceptable appearance, history, traditions, holidays, and a source of pride or taboo topics. Each person shares their answers.

Meet Someone New: Each person shares what month they were born and finds someone born the same month that they don't know well. What's one other thing they have in common?

Name Tag: Use this as an initial get-acquainted exercise. As each participant enters the meeting room, they can sign their name as usual, but then give them 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 and then talk about how they got their name or the history behind it. Perhaps they are named after someone specific or maybe their last name means something in an ancestral language.

Just By Looking at Me: This activity allows participants to disclose some personal information that others may not know. The goal is to demonstrate that there is much more to a person than meets the eye. Form a circle with chairs if able. Pass around the following script on paper: "My name is ___ and I am from ___. One thing you cannot tell just by looking at me is ___." Demonstrate the prompt first by modeling the exercise. Ask participants to take turns reading the above statement after filling in the blanks about themselves.

Trivia Game is a way to spark fun competition between participants while also providing an opportunity to learn something new. Create a list of 15-20 interesting and fun facts related to a theme. Choose the format to host your trivia game such as an online trivia platform for a gameshow effect or take a more traditional approach by using paper or whiteboards. Both options could work in a virtual or in-person setting.

Guess Who helps to get to know people in the room through interesting facts without having participants introduce themselves. Have each participant write one or two facts about themselves, either on a piece of paper or have them submit anonymously via email or a google form prior to the meeting. Someone reads the first fact and then participants guess whose interesting fact is being read aloud. Once the correct person is identified, they can elaborate on their fact and then read the next one. Repeat process until all facts are read.

DEI RESOURCES

The world of Diversity, Equity, and Inclusion is vast and ever-changing. National PTA has excellent materials and resources for your use. Find these resources and more at [PTA.org/home/run-your-pta/Diversity-Equity-Inclusion](https://pta.org/home/run-your-pta/Diversity-Equity-Inclusion) where all documents are also available in Spanish.

Commitment to DEI:

[PTA.org/docs/default-source/default-document-library/dei-brief-final-072720.pdf](https://pta.org/docs/default-source/default-document-library/dei-brief-final-072720.pdf)

Local Leader DEI Guidance:

[PTA.org/docs/default-source/files/runyourpta/2020/diversity/dei-guide-for-pta-local-leaders.pdf](https://pta.org/docs/default-source/files/runyourpta/2020/diversity/dei-guide-for-pta-local-leaders.pdf)

How to Welcome Diverse Perspectives Into Your PTA:

[PTA.org/docs/default-source/default-document-library/diversity-outreach-2-pager_v3.pdf](https://pta.org/docs/default-source/default-document-library/diversity-outreach-2-pager_v3.pdf)

DEI Frequently Asked Questions:

[PTA.org/home/run-your-pta/Diversity-Equity-Inclusion/leadership-tips-and-tools/Diversity-and-Inclusion-Initiatives-Frequently-Asked-Questions](https://pta.org/home/run-your-pta/Diversity-Equity-Inclusion/leadership-tips-and-tools/Diversity-and-Inclusion-Initiatives-Frequently-Asked-Questions)

DEI Community Profile Template:

[PTA.org/docs/default-source/default-document-library/dei-community-profile-template-final.pdf](https://pta.org/docs/default-source/default-document-library/dei-community-profile-template-final.pdf)

Enhancing DEI Facilitator's Guide:

[PTA.org/docs/default-source/default-document-library/enhancing-dei-facilitator's-guide-final.pdf](https://pta.org/docs/default-source/default-document-library/enhancing-dei-facilitator's-guide-final.pdf)

DEI Action Plan Template:

[PTA.org/docs/default-source/default-document-library/dei-action-plan-template-final.pdf](https://pta.org/docs/default-source/default-document-library/dei-action-plan-template-final.pdf)

Inclusive Holiday Planning:

[PTA.org/docs/default-source/files/runyourpta/diversity/inclusive-holiday-programming.pdf](https://pta.org/docs/default-source/files/runyourpta/diversity/inclusive-holiday-programming.pdf)

Inclusive Communication During the Holidays:

[PTA.org/docs/default-source/files/runyourpta/diversity/inclusive-communication-during-the-holidays.pdf](https://pta.org/docs/default-source/files/runyourpta/diversity/inclusive-communication-during-the-holidays.pdf)

Inclusive Curriculum in K-12 Schools:

[PTA.org/docs/default-source/files/advocacy/position-statements/inclusive-curriculum-in-k-12-schools-ps.pdf](https://pta.org/docs/default-source/files/advocacy/position-statements/inclusive-curriculum-in-k-12-schools-ps.pdf)

LGBTQ Glossary:

[PTA.org/docs/default-source/files/runyourpta/2020/diversity/lgbtq-glossary.pdf](https://pta.org/docs/default-source/files/runyourpta/2020/diversity/lgbtq-glossary.pdf)

How to Talk About Race and Justice in America:

[PTA.org/docs/default-source/default-document-library/how-to-talk-about-race-justice-in-americaaa2a48f1aa3e63899f67ff00009b2bd9.pdf](https://pta.org/docs/default-source/default-document-library/how-to-talk-about-race-justice-in-americaaa2a48f1aa3e63899f67ff00009b2bd9.pdf)

PTA Leader Toolkit

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Section 9: Elections & Nominating Committee



LouisianaPTA.org

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PTA is a ^{**VERB!**} ~~noun~~.

Louisiana Parent Teacher Association

NOMINATING COMMITTEE

The Nominating Committee is a special committee that is responsible for presenting the best qualified nominees for office. A successful election is important for a smooth transition from year to year. All members are invited and encouraged to get involved in this important process and not just those on the current Board of Directors. Any member who has paid the current year's dues to the unit is eligible to be on the Nominating Committee. All members should have an opportunity to nominate or be nominated for the committee. If not elected to the committee, others may serve in an advisory capacity. Committee members should be fair, ethical, impartial, tactful, discrete, and must keep all deliberations confidential even after elections are held. The current PTA President and the principal **may not** serve on the committee.

The committee is elected by the General Membership, as described in Article X, Section 5 of the LAPTA Local Unit Bylaws Template, May 2022 revision, which also states the uneven number of people to be elected. The Secretary reads those portions of the Bylaws pertaining to the nomination and election of officers to the entire membership before the election of the committee. Form the committee at a General Membership meeting before the meeting that will have elections. This would be the first or second General Membership meeting of the year.

The Nominating Committee meets immediately to select the Committee Chair. Schedule the date, time, and location for meetings. The committee should have the Bylaws, Standing Rules, board list, membership roster, and job descriptions. Committee meetings are open to committee members only. If a member of the committee is running for an office, they may not be a part of the discussion of the office for which they are running. The committee shall review all sections of the Bylaws relating to the duties of the Nominating Committee including the month of the election meeting. This is done 30-45 days before elections. They solicit suggestions for nominees from the membership, current Board members, and staff. Consider the candidate's qualifications and choose the best person for each position. Individuals currently serving in a position are not automatically allowed to keep that position.

The committee may contact prospective candidates during the committee meeting to explain the duties. Prospective candidates for officer positions should be somewhat knowledgeable about PTA, willing to attend training, enthusiastic for the PTA vision, mission, and purposes, and willing to commit the time necessary for the position. Treat all candidates in a fair and consistent manner. If the committee cannot secure a nominee for a position, it remains open and the President calls for nominations for that position from the floor at the election meeting. *****This is an update by LAPTA: candidates do not have to be a current member of the PTA when they are nominated but are still required to be a paid member of the PTA during their term in office.**

Make committee decisions by ballot and majority vote. Select one nominee for each officer position and be prepared to state qualifications of nominees. Prepare a written report signed by all committee members who agree with the report. A sample report is at the end of this section. Reconvene the committee if a slated candidate withdraws.

The committee shall present the report to the Board of Directors for information only. The Committee Chair may present the report to the current PTA President as a courtesy, prior to presentation to the Board. Publish the Nominating Committee Report **at least 20 days** before the election meeting to the General Membership.

On elections day, the Nominating Committee's report is usually read by the Committee Chair during the meeting. The Nominating Committee is dissolved once the report is read. The report is passed to the President, who opens the floor for nominations from the floor and conducts the elections. Only a member who has not signed the report can nominate from the floor.

ELECTIONS

Before the election's General Membership meeting, review Article VI, Section 4, and Article XI, Section 4, of the Bylaws (May 2022 rev.), which describes when and how the unit elects. Publicize the slate of officers at least 20 days before the election meeting. Always have the current membership roster on hand because only current members may vote. After the Nominating Committee presents its report to the General Membership, the presiding officer conducts the election even if they are a nominee. The presiding officer presents each nominee individually and calls for additional nominations from the floor. Nominations do not require a second, only the nominee's consent.

Non-Contested Election: If there are no additional nominees, it is a non-contested election, and the vote may be by voice. However, if a member requests a vote by ballot for any office, the request must be recognized and voted upon by the membership without debate.

Contested Elections: If there are additional nominees, they should be introduced and given two minutes to speak. This is considered a contested election and the vote must be by ballot with only current members voting. Have paper on hand to distribute. It is permissible to use both voice and ballot voting for one election where offices with only one candidate use a voice vote and offices with more than one candidate use ballot vote.

Voters and Ballots: It is necessary to verify who is a PTA member prior to conducting a contested election by using the membership roster. The presiding officer appoints a Teller Committee. No nominee should serve as a Teller. The presiding officer counts the members eligible to vote in the election. The tellers distribute, collect, and count ballots and provide a signed report to the presiding officer. A nominee may designate a person to observe the ballot count. For each contested office, the Teller Committee Report should include the number of members eligible to vote, the number of votes cast, number of illegal ballots, number needed to elect, list of candidates, and number of votes each candidate received. See the Teller Report Form at the end of this section.

Illegal ballots include two ballots folded together, a ballot including the names of too many candidates, or an unintelligible ballot. If the meaning of an unintelligible ballot is doubtful but the ballot would not affect the results of the election, the ballot shall be ignored. If the ballot affects the outcome, it is shown to the chair who should ask the membership for a ruling. The chair of the Teller Committee reads the report for each contested office and gives the report to the presiding officer. The presiding officer rereads the report and announces the results for each office. The secretary enters the Teller Committee Report including counts and totals in the minutes.

If no candidate receives a majority of the votes cast for the office, then it is necessary to re-ballot. The voting members must first be recounted. If a member eligible to vote was not present when the original ballot was cast but arrives in time for another vote, the member is entitled to vote. Following the announcement of the vote, the chair of the tellers moves that the ballots be destroyed.

Assuming Office: Those elected assume office as specified in the Bylaws. An officer serves until a successor is elected. If a vacancy occurs after the election, the vacancy is filled after the newly elected officers assume office, according to the method of filling vacancies prescribed in the Bylaws under Article VI, Section 7 (May 2022 rev.).

ELECTION TIMELINE SUMMARY

The following outlines the deadlines and steps for a proper election based on standard parliamentary procedure. Refer to the Bylaws for further guidance at Article VI, Officers and Their Election. The Bylaws need to be current and formatted in the Louisiana Local Unit Bylaws, May 2022 Bylaws template style.

1. Pick the election date which needs to be during a General Membership meeting at the end of the year.
2. At the first or second General Membership meeting of the year, form the Nominating Committee and make a motion to approve the nominees.
3. **30-45 days before elections** (minimum of 30 days): Make a public call for officer candidates. The Nominating Committee interviews all candidates.
4. **20 days before elections:**
 - a) Publicize the General Membership meeting and election date.
 - b) Publish the Slate of Officers chosen by the Nominating Committee.
 - c) Publicly ask for any other self-nominations or nominations from the floor which must be received no later than 5 days before elections.
5. **4 days before elections:** Publish the final slate of officers with any additional self-nominations or nominations from the floor. Publish a reminder for when elections will be held.
6. **Election Day:** Hold elections.
7. **Within 5 days after elections:**
 - a) Publish the results.
 - b) Email the results with names and contact information to LAPTA at office@LouisianaPTA.org.

Here is a **sample** timeline if elections were held on May 1.

- 1) August or December General Membership: Form the Nominating Committee.
- 2) March 15: Public call for officer candidates.
- 3) March 15 – April 10: Nominating Committee interviews candidates.
- 4) April 11: Publish General Membership meeting and election date, Nominating Committee's Slate of Officers, and ask for any self-nominations or nominations from the floor.
- 5) April 25: Last day for self-nominations or nominations from the floor.
- 6) April 26: Publish the final slate of officers with any self-nominations or nominations from the floor. Publish a reminder for when elections will be held.
- 7) May 1: Hold elections.
- 8) May 1-5: Publish results from elections. Email results & contact information to LAPTA at office@LouisianaPTA.org.

Enter your dates here:

- 1) _____ Date of earlier General Membership Meeting when Nominating Committee is formed.
- 2) _____ Date 30-45 days before elections for public call for officer candidates. Interviews begin.
- 3) _____ Date 20 days before elections to publicize meeting, election, slate of officers, & self-nominations.
- 4) _____ Date 4 days before elections to publish final slate of all nominees and meeting reminder.
- 5) _____ Date of elections.
- 6) _____ Date within 5 days after elections to publish results and email results and contact info to LAPTA.

SCRIPT FOR NON-CONTESTED ELECTION

President: “The next order of business is the election of officers. The Secretary will read Sections 4 and 5 of Article VI of the Bylaws pertaining to elections.”

Secretary: Stands and reads the Bylaws section.

President: “The Nominating Committee Chair will read the report of the Nominating Committee.”

Nominating Committee Chair: “Mr./Madam President, the Nominating Committee recommends the following slate of officers: for President, [name]; for Vice-President, [name]; for Treasurer, [name]; and for Secretary, [name].” *(The chair hands the written report to the President which is at the end of this section.)*

President:

“For President, [name] has been nominated by the Nominating Committee. Are there further nominations for President from the floor? *(pause)* Hearing none, nominations are closed.”

For Vice-President, [name] has been nominated by the Nominating Committee. Are there further nominations for Vice-President from the floor? *(pause)* Hearing none, nominations are closed.”

For Treasurer, [name] has been nominated by the Nominating Committee. Are there further nominations for Treasurer from the floor? *(pause)* Hearing none, nominations are closed.”

For Secretary, [name] has been nominated by the Nominating Committee. Are there further nominations for Secretary from the floor? *(pause)* Hearing none, nominations are closed.”

“The Bylaws state a voice vote is acceptable when there is but one nominee for an office. All those in favor of the slate of officers as presented, say *aye*. *(pause)* All those opposed, say *nay*. *(pause)* The ayes have it and the slate as presented is elected. Congratulations.”

SCRIPT FOR CONTESTED ELECTION

President: “The next order of business is the election of officers. The Secretary will read Sections 4 and 5 of Article VI of the Bylaws pertaining to elections.”

Secretary: Stands and reads the Bylaws section.

President: “The Nominating Committee Chair will read the report of the Nominating Committee.”

Nominating Committee Chair: “Mr./Madam President, the Nominating Committee recommends the following slate of officers: for President, [name]; for Vice-President, [name]; for Treasurer, [name]; and for Secretary, [name].” (*The chair hands the written report to the President.*)

President: “For President, [name] has been nominated by the Nominating Committee. Are there further nominations for President from the floor? (*pause*)

Member: “Mr./Madam President, I nominate [new name] for President.”

President: “[New name] has been nominated for President. Are there further nominations for President? (*pause*) Hearing none, nominations are closed.”

The president continues this procedure for each office.

President: “As President, I appoint [four people] as tellers for the Teller Committee. Will [specific Teller’s name] serve as chair?” (*pause*) *Teller Committee Report Form is at the end of this section.*

“The voting members will rise and count off. A teller will hand you a ballot as you count off. Please take your seat immediately after saying your number and receiving your ballot. Beginning with the member in the front row to my far left, please say ‘one’ and then be seated.”

“There are [number] voting members present. The candidates for President are [name 1] and [name 2]. Using the ballot provided, write your choice for election, and then individually fold your ballot once. Do not combine or fold any votes together.” (*Allow two or three minutes for voting.*)

President: “Have all voted who wish to vote? Will the tellers please collect the ballots?”

Tellers leave to count ballots. The President proceeds with other business until the tellers are ready to report.

President: “The tellers are ready to report.”

Teller Committee Chair: “The Teller Committee reports that the number of members eligible to vote is _____. The number of votes cast is _____. The number of illegal votes cast is _____. The number of votes needed for election is _____. (Candidate Name 1) received (#)_____ votes. (Candidate Name 2) received (#)_____ votes.

President: “[Name of winner], having received a majority of the votes cast, is elected President. Congratulations.” *Continue to the next officer position.*

NOMINATING COMMITTEE REPORT

The Nominating Committee of the _____ PTA/PTSA submits the following slate of officers for the year _____:

For President: _____

For Co-President: _____

For Vice-President: _____

For Second Vice-President: _____

For Treasurer: _____

For Secretary: _____

For [Other]: _____

For [Other]: _____

In the event the committee cannot secure a nominee for a position, it remains "open."

Members of the Nominating Committee:

_____ Name	_____ Signature	_____ Date
---------------	--------------------	---------------

_____ Name	_____ Signature	_____ Date
---------------	--------------------	---------------

_____ Name	_____ Signature	_____ Date
---------------	--------------------	---------------

_____ Name	_____ Signature	_____ Date
---------------	--------------------	---------------

*Nominating Committee members sign the report if they **agree** with the nominations. Members not in agreement with the recommended slate of officers do not sign the report and are eligible to make nominations from the floor.*

Retain this official report as part of the Secretary's minutes.

TELLER COMMITTEE REPORT

Name of PTA/PTSA: _____

For the Office of _____

_____ Number of members eligible to vote

_____ Number of votes cast

_____ Number of illegal votes cast

_____ Number of votes needed for election

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Candidate Name: _____ received _____ votes.

Teller Chair shall make a motion to destroy all ballots after reading the Teller Committee Report.

Members of the Teller Committee:

_____	_____	_____
Name	Signature	Date

_____	_____	_____
Name	Signature	Date

_____	_____	_____
Name	Signature	Date

_____	_____	_____
Name	Signature	Date

Retain this official report as part of the Secretary's minutes.

PTA Leader Toolkit

2023 – 24

Section 10: Bylaws, Standing Rules, & Articles of Incorporation

LouisianaPTA.org/bylaws



LouisianaPTA.org

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ARTICLES OF INCORPORATION

Louisiana law requires that all non-profits 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 website at geauxbiz.com to renew, set up annual email reminders, update the officers, and pay a \$15 renewal fee. The Articles of Incorporation shall be kept permanently on file and are part of the annual Active Affiliation Report that is submitted to LAPTA. See LouisianaPTA.org/activeaffiliation.

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.



COMMERCIAL DIVISION
 225.925.4704
 Fax Numbers
 225.932.5317 (Admin. Services)
 225.932.5314 (Corporations)
 225.932.5318 (UCC)

Name	Type	City	Status
LOUISIANA PARENT-TEACHER ASSOCIATION	Non-Profit Corporation	MANDEVILLE	Active

Previous Names

Business: LOUISIANA PARENT-TEACHER ASSOCIATION
Charter Number: 00702580N
Registration Date: 5/9/1930
Domicile Address
 1131 NORTH CAUSEWAY BLVD
 SUITE 306
 MANDEVILLE, LA 70471
Mailing Address
 P O BOX 4420
 COVINGTON, LA 70434

Status
Status: Active
Annual Report Status: In Good Standing
File Date: 5/9/1930
Last Report Filed: 4/21/2022
Type: Non-Profit Corporation

Registered Agent(s)

Agent: KAYLA PAGEL
Address 1: 1131 N CAUSEWAY BLVD
Address 2: SUITE 306
City, State, Zip: MANDEVILLE, LA 70471
Appointment Date: 8/19/2021

Officer(s) Additional Officers: No

Officer: KAYLA PAGEL
Title: President
Address 1: 1131 N CAUSEWAY BLVD
Address 2: SUITE 306
City, State, Zip: MANDEVILLE, LA 70471

Officer: BETH MAILLHO
Title: Secretary/Treasurer
Address 1: 1131 N. CAUSEWAY BLVD
Address 2: SUITE 306
City, State, Zip: MANDEVILLE, LA 70471

Amendments on File (4)

Description	Date
Amendment	12/3/1971
Revoked	8/18/1998
Reinstatement	5/23/2003
Appointing, Change, or Resign of Officer	6/26/2017

APPROVAL OF BYLAWS AND AMENDMENTS

Bylaws are the fundamental governing rules of a PTA. They contain the basic rules related to conducting the unit's business and governing its affairs. The Bylaws define the primary characteristics of the organization, prescribe how the association functions, and include all rules considered important to the rights and responsibilities of membership.

The Bylaws are a template created by LAPTA that includes required language which cannot be changed by the local PTA. The customizable areas are changeable by the local PTA to best meet their needs. Download the Bylaws template at LouisianaPTA.org/bylaws. Amendments to the customizable areas may occur at any time. They require approval by the General Membership at a meeting with 20 days' notice and a final approval by LAPTA.

LAPTA requires all local units to submit updated Bylaws **every three years**. All approved, official Bylaws have an "LAPTA Approval Date" on page one. The Board needs to know when the Bylaws expire and timely update the Bylaws. To update or amend the Bylaws:

1. Form a Bylaws Committee of at least three members which must be approved by the General Membership by making a motion. The committee shall include experienced and knowledgeable PTA members. The President should have a copy of the current approved Bylaws or request a copy from LAPTA at Bylaws@LouisianaPTA.org.
2. Obtain the official fill-in-the-blank LAPTA Bylaws template online at LouisianaPTA.org/bylaws or email Bylaws@LouisianaPTA.org. The Bylaws Committee meets to complete the proposed Bylaws. Provide the Bylaws Committee with the old Bylaws for reference. 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 number(s) in the Bylaws. The PTA can email the proposed Bylaws to LAPTA to check for any problems at Bylaws@LouisianaPTA.org.
3. Notify the General Membership in writing at least 20 days prior of the next General Membership meeting where the vote will occur to update the Bylaws.
4. Present the General Membership with the proposed Bylaws or amendments before voting. Approval requires a two-thirds vote of the members present. Quorum must be met.
5. Complete the Bylaws and Amendments Approval Form found at the end of this section or at LouisianaPTA.org/bylaws.
6. Email both the approved Bylaws (or amendment) and the Bylaws Approval Form to Bylaws@LouisianaPTA.org for final LAPTA approval. The Bylaws do not go into effect until LAPTA stamps and dates them and then emails the final copy back to the PTA.

Give LAPTA 30 days to review and approve the Bylaws or amendments. If there are questions, LAPTA will contact the President. Once approved, they will be stamped "APPROVED," signed, and dated. The stamped, signed, and dated copy is the official copy of the Bylaws and are current for three years. The Bylaws and amendments become effective once LAPTA emails back the final approval to the President's email. Save the digital file in the PTA records and share with the Board.

BYLAWS APPROVAL TIMELINE SUMMARY

The following outlines the deadlines and steps to properly update the Bylaws based on standard parliamentary procedure. Refer to LouisianaPTA.org/bylaws for further guidance. The Bylaws need to be formatted in the Louisiana Local Unit Bylaws, May 2022 Bylaws template style.

1. Pick the date for the General Membership meeting that will vote on the Bylaws, noting that two General Membership meetings are needed to complete the process.
2. At the first General Membership meeting, appoint the Bylaws Committee of at least three people by making a motion.
3. The Bylaws Committee meets to complete the proposed LAPTA Bylaws template.
4. At least 20 days before the second General Membership meeting, publicly give notice of the meeting and post the Bylaws for review by the membership.
5. At the second General Membership meeting, ensure that the quorum is met. Present the Bylaws. Have time for any questions or changes. Make a motion to accept the Bylaws. A two-thirds vote of approval by the members present is required. Complete the Bylaws Approval Form.
6. Email the Bylaws Approval Form and the Bylaws to LAPTA at Bylaws@LouisianaPTA.org. LAPTA will review the Bylaws, give them the final stamp of approval and date of acceptance, and then email the stamped copy back to the PTA.

Here is a **sample** timeline if the Bylaws were to be presented and approved at a General Membership meeting held on December 15.

August 28: The first General Membership Meeting appoints the Bylaws Committee by making a motion.

September - November: Bylaws Committee meets as needed to complete the Bylaws template found at LouisianaPTA.org/bylaws. 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 questions or discussions. Make a motion to accept the Bylaws. A two-thirds vote is required. Complete the Bylaws Approval Form.

December 16: Email the approved Bylaws and the Bylaws Approval Form to Bylaws@LouisianaPTA.org.

January 5: LAPTA reviews the Bylaws, stamps and dates them, and emails the final approved Bylaws to the PTA.

Enter your dates here:

_____ Date of 1st General Membership 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 2nd General Membership meeting when the meeting date is publicized and the Bylaws are posted for review by the membership.

_____ Date of 2nd 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.

_____ Date 30 days after emailing LAPTA which is the deadline for LAPTA to email the final approved Bylaws back to the PTA.

BYLAWS AND AMENDMENTS APPROVAL FORM

Local PTA units are required to update and submit their Bylaws to LAPTA every three years. The Bylaws Approval Form and the LAPTA Bylaws template are required. Visit LouisianaPTA.org/bylaws for details. Bylaws not in compliance will be returned to the PTA. Email the completed Bylaws Approval Form and LAPTA Bylaws template or the amendments to Bylaws@LouisianaPTA.org. Please allow 30 days for LAPTA to approve the Bylaws or amendments. Once completed, LAPTA will email the approved Bylaws or amendments to the President's email.

Local PTA Unit Name Parish LUR#

President's Email President's Phone

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

Choose one.

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

Choose all that apply.

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

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

President's Signature Date Secretary's Signature Date

President's Name Secretary's Name

Email the completed Bylaws Approval Form and Bylaws template (if applicable) to Bylaws@LouisianaPTA.org.

Contact Bylaws@LouisianaPTA.org with any questions.

INSTRUCTIONS FOR BYLAWS TEMPLATE

LAPTA fill-in-the-blank Bylaws template simplifies the process and expedites approval. Text not in bold is required and cannot be altered. Changes can only be made to sections of the Bylaws that have **bolded** areas. Additional changes to these sections must be listed in an addendum and comply with LAPTA rules.

Page 1: PTA Unit Information

Line 2: PTA Unit's Name
Line 4: Local Unit Registration Number (LUR#)
Line 5: Federal Employer Identification Number (EIN)
Line 7: School that the PTA supports
Lines 9 -11: School address
Line 13: Parish that the PTA Unit is in

Page 2: Article I: Name

Line 35: PTA Unit name and city

Page 6: Article V: Membership and Dues

Line 214: Fill in the dues amount for each membership type with the number of memberships allowed. For example, \$8 for a single, \$5/student, \$15/couple (2 members), \$50/corporate (5 memberships).

Page 6: Article VI: Officers and Their Election

Line 228: Write the number of vice-president(s)
Line 229: Write the number of secretary(ies)
Line 231: Write any additional officers in the addendum.
Line 234: Write the month(s) elections will be held; must be during a General Membership Meeting.
Line 243: Write the date the elected officers will assume their positions, usually July 1 – June 30.
Line 244: Write the length of the elected officer's terms.
Line 245: Write the maximum number of additional terms elected officers are allowed to serve.

Page 9: Article VIII: Executive Committee, Section 4B. Meetings

Line 362: Write the number of days' notice provided for a special meeting of the committee.

Page 10: Article IX: Board of Directors, Section 5B. Meetings

Line 409: Write the number of days' notice provided for a special meeting of the board.

Page 11: Article X: Committees, Section 5. Nominating Committee

Line 453: Write the number of members for the Nominating Committee (no less than three and an odd number).
Line 458: Write the month/months the Nominating Committee reports to the General Membership meeting in which elections will be held.

Page 12: Article XI: General Membership Meetings

Line 473: Section 1. Meeting Dates. Write the months the unit will hold General Membership meetings. Be sure to include the month/months the election is held.
Line 480. Section 3. Quorum. Write a quorum of at least twice the number of officers listed in Article VI: Officers and Their Elections, Section 3 and any additional officers listed by the unit in the addendum, plus one. This prevents the perception that officers could conduct PTA business by themselves.
Line 482. Elections Meeting. Fill in the month/months the elections will be held which must be when the General Membership meeting is held.

Page 13: Addendum. List any additional changes to the Bylaws. The page number plus article and section number are required when listing the changes. An example: **Page 12, Article XI, Section 4. Elections meeting. Current wording:** The annual elections meeting shall be held in the month of April.
The proposed change will be to: The annual elections meeting shall be held in the month of May.

Questions? Email Bylaws@LouisianaPTA.org.

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 administration 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.

Local PTA Units should have their own personal Standing Rules. Standing Rules are the rules the PTA adopts to administer PTA work under the provisions of the Bylaws. Standing Rules must conform to and may not conflict with the Bylaws. They are generally not adopted when a PTA is newly organized but are developed and adopted as needs arise. The following guidelines are suggestions and should be attached to the Standing Rules for ongoing reference and instruction.

Standing Rules are more flexible than Bylaws. They do not contain parliamentary procedure and are adopted and amended. Standing Rules are kept with the Bylaws in the officers' procedure binders and are passed on to incoming officers. All Board members and committee chairs should have a copy of the Standing Rules. The Bylaws and Standing Rules need to be studied by incoming officers and reviewed frequently for understanding and training to ensure they are still accurate and applicable. The secretary has a copy of the Standing Rules available at all PTA meetings.

Each set of Standing Rules is unique. No two are alike because no two PTAs are alike. Developing Standing Rules is not difficult. They may be adopted individually in a General Membership meeting as the need arises.

To adopt a set of Standing Rules, appoint a committee of at least three experienced, knowledgeable members of the PTA to prepare them. Using the Bylaws as a starting point, the committee should consider each provision and then formulate instructions for applying it. Use the minutes of Board and General Membership meetings and the experience of committee members as additional resources. After the committee prepares the Standing Rules, they are presented to the Board for review and then to the General Membership for approval by a majority vote.

Standing Rules may contain as much information and detail as needed for the functioning of the PTA. The more details included, the easier the job will be for future board members. Standing Rules should include any specific, detailed duties and responsibilities for individual officers, Executive Committee, Board, and committee chairs. 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.

See a sample Standing Rules at LouisianaPTA.org/bylaws. Detailed information about the following additional topics and more could be included in the Standing Rules:

- Titles and specific duties of the Vice-Presidents
- Orientation of new Board Members
- Procedure binders
- Meetings
- Details for standing and special committees, which might include finance, membership, public relations, newsletter, volunteers, programs, legislation, Reflections, budget, teacher appreciation, hospitality, etc.
- Committee's duties, who serves on them, and how committee members are determined
- Needs assessment
- Student involvement
- Fiscal policies and procedures, including location of bank and updating signatories and debit cards
- Nominating Committee instructions
- Installation of new officers
- Requirements for special recognitions and awards
- Equipment the PTA owns and where it is located
- LAPTA meetings and who attends

PTA Leader Toolkit 2023 – 24

Section 11: Awards, Grants, & Contests

LouisianaPTA.org/awards
LouisianaPTA.org/grants
LouisianaPTA.org/contests



LouisianaPTA.org

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AWARDS, GRANTS, & CONTESTS SUMMARY

Membership Awards:

August Early Bird Award
September Head Start Award
October Fall Into PTA Award
November Geaux PTA Award
December Lagniappe Award
January Welcome Back Award
February Founders' Day Award
March Madness Award
Membership Super Grower Award
Membership Marvel Award
Golden Apple Award
Platinum One Voice for Every Child Award
Gold One Voice for Every Child Award
Silver One Voice for Every Child Award

Advocacy Awards:

Outstanding Advocates for Children for a PTA Unit
Outstanding Advocates for Children for a Student
Be the Voice for a PTA Unit
Be the Voice for a Student

Other Awards:

Volunteer of the Year Award
Outstanding Newsletter Award
Mentor-A-PTA Award

Contests and Reflections:

Red Ribbon Poster Contest
Reflections Theme Contest
Reflections Program with many awards

Grants from LAPTA:

\$750 Literacy Grants
\$750 Healthy Minds Grants
\$500 Day of Service Grants
\$500 Creative Teacher Grants

LAPTA MONTHLY MEMBERSHIP CHALLENGES

LAPTA has a goal of 13,013 members for our 101st year in 2023-24. LAPTA needs the support of the Local PTA Units to help reach that goal! To be eligible for awards, all PTAs must have Active Affiliation status. The qualifying PTA units will receive recognition and automatically be entered into a **monthly drawing for \$100!**

August Early Bird Award

Submit 25 members by August 31 plus all Officers are registered at LouisianaPTA.org/register.

September Head Start Award

Jump start the PTA with 50% or more of the previous year's PTA membership total by September 30.

October Fall Into PTA Award

Before you trick or treat, submit 31 new memberships by October 31.

November Geaux PTA Award

File Active Affiliation Report and get more than 75% of previous year's PTA membership by Nov. 30.

December Lagniappe Award

Achieve 100% of previous year's membership and completed Active Affiliation Packet by December 31.

January Welcome Back Award

Keep up the momentum going with 10 new members by January 31.

February Founders' Day Award

In honor of PTA Founders' Day on February 17, add 17 new members by February 28.

March Madness Award

Make it a sweet sixteen by submitting dues for 16 new members by March 31.

LAPTA ANNUAL MEMBERSHIP AWARDS

LAPTA has a goal of 13,013 members for our 101st year in 2023-24 and we need our Local PTA Units to help reach that goal! Qualification for awards is done without application. LAPTA uses the information on the Local PTA Unit Membership Reports emailed to submit@LouisianaPTA.org by April 1, 2023. The annual membership awards will be announced at the General Membership Meeting on April 20, 2023. All PTAs who qualify for the Platinum One Voice for Every Child Award enters into a drawing where **two PTAs will win \$500!**

Super Grower

PTA with the greatest increase from previous year.

Membership Marvel Award

Increase membership by 10% over the previous year average or reach your goal from LAPTA.

Golden Apple Award

100% membership of teachers and administrators.

Platinum One Voice for Every Child Award

Recruit members equal to 100% of student enrollment; All winners enter a drawing for two PTAs to **win \$500!**

Gold One Voice for Every Child Award

Recruit members equal to 75% of student enrollment.

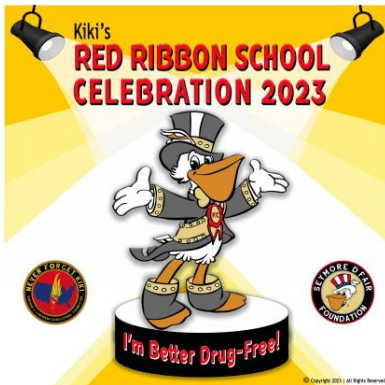
Silver One Voice for Every Child Award

Recruit members equal to 50% of student enrollment.

KIKI's RED RIBBON DRUG-FREE POSTER CONTEST

Deadline to submit to LAPTA: October 20, 2023
LAPTA Winners Announced: October 30, 2023

Submit Entries: form.jotform.com/221746113272146
Quantity Offered: 9 (Three/category)



The Louisiana Seymour D'Fair Foundation celebrates their Kiki Red Ribbon Week School Celebration 2023 with the theme **"I'm Better Drug-Free."** Enrique "Kiki" Camarena was a Drug Enforcement Administration Agent who was tortured and killed in Mexico in 1985. In honor of Kiki's memory and his battle against illegal drugs, friends and neighbors began to wear red badges of satin. Parents then began to form coalitions using Camarena as their model while embracing his belief that one person can make a difference. Today, the Red Ribbon serves as a catalyst to mobilize communities to educate youth and encourage participation in drug prevention activities. See <https://www.youtube.com/watch?v=jSzaUkwumZ0>.

Check out SeymoreFoundation.org for support information to implement the program at your school. For this contest students create a drawing on regular 8½ X 11 white paper that illustrates the "I'm Better Drug-Free" theme. Local PTA Units can pick three winners per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-6) and Special Artist Category (students of all ages with an ADA Section 504). The deadline to submit posters to LAPTA is October 20, 2023. LAPTA winners will be announced October 30, 2023.

There are several ways this can be organized. The PTA could choose to have the teachers do the contest in their classrooms, an art teacher could organize it, or it could be done at home by the students. Provide copy paper for students or they could even draw on the back of the flyer.

How to Submit Local PTA Winners to LAPTA

1. The PTA picks three winners per Grade Category to submit to LAPTA for consideration. Ensure that all winners have signed a Media Release Form with the school. Take a picture of the winning posters in good lighting from directly above the picture. Be careful to include all edges and corners of the drawing in the picture.
2. Go to <https://form.jotform.com/221746113272146> or scan the QR Code. Complete the form and upload the image by October 20, 2023. Information you will need is PTA name, Grade Category, student name, grade, and parent contact information. Upload images of each winning drawing.

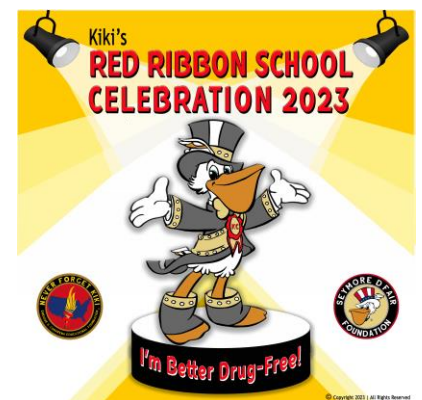


SAMPLE PTA DRUG-FREE POSTER CONTEST FLYER

DEADLINE: Tuesday, October 17, 2023

The Louisiana Seymour D'Fair Foundation celebrates their Kiki Red Ribbon Week School Celebration 2023 with the theme **"I'm Better Drug-Free."** Check out SeymoreFoundation.org for more information. Students are to create a drawing that supports the theme on regular 8½ X 11 white paper. What are some ways students can contribute to their community by being drug-free?

[Include how the contest will be organized.] There will be three Awards of Merit winners for each grade and three Awards of Excellence winners [per Grade Category] that will advance to the Louisiana PTA for further judging. The deadline to submit Safety Posters to [details] is **[Date], 2023**. Winners will be announced Friday, October 20, 2023, and move up to Louisiana PTA for further judging. Louisiana PTA will announce its winners on Monday, October 30, 2023.



2025 – 26 REFLECTIONS THEME SEARCH

Deadline: November 17, 2023
Winners Announced: November 30, 2023

Submit Entries: form.jotform.com/221745830340147

The search is on for a future Reflections theme! National PTA’s Reflections art program has helped students explore their own thoughts, feelings, and ideas, develop artistic literacy, increase confidence, and find a love for learning that will help them become more successful in school and in life. Each year, over 300,000 students in Pre-K through Grade 12 create original works of art in response to a student-selected theme. With this theme, students will create works of art in six categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, and Visual Arts.

Help us pick the theme that will spark fun and creativity for a future National PTA Reflections program! The student who submits the final winning entry for National PTA will receive a \$100 prize. We’re looking for the most original theme ideas. This means past themes and duplicate submissions will not be considered. The past list of themes can be found at the bottom of the submission form page linked below.

The Reflections Theme for this year is “I Am Hopeful Because…” by Alice Meko of Hampton Cove Elementary School in Alabama.



To participate, students go to <https://form.jotform.com/221745830340147> or scan the QR Code to submit their entry directly with Louisiana PTA. They should check out the past winning themes at the bottom of the entry portal to make sure they do not duplicate past themes.

Download this image and share on social media or as a flyer to students!

The flyer features the National PTA Reflections logo at the top, which includes a stylized profile of a head with a large 'R' and the text 'NATIONAL PTA REFLECTIONS'. Below the logo, the text reads 'CALL FOR ENTRIES!' in blue, followed by 'The new theme is needed for 2025-2026!' in orange and green. It then says 'Help us pick the theme idea that will spark fun and creativity for the National PTA Reflections Program.' in green. The deadline 'Deadline: November 17, 2023' is in red. On the right side, there are six icons representing the art categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, and Visual Arts. Below these icons, it says 'Enter your idea at:' followed by the URL 'https://form.jotform.com/221745830340147' and 'Scan me!' with a QR code. At the bottom right, the website 'LouisianaPTA.org/reflections' is listed in orange.

REFLECTIONS PROGRAM

Winners Due to LAPTA: January 22, 2024

LAPTA Winners Announced: March 1, 2024

National PTA has a long-standing commitment to arts education. The Reflections program provides opportunities for recognition and access to the arts, which boosts student confidence and success in the arts and in life. Each year, over 300,000 students in Pre-K through Grade 12 create original works of art. This 50+ year old program helps them explore their own thoughts, feelings, and ideas, develop artistic literacy, increase confidence, and find a love for learning that will help them become more successful. The Reflections theme is ***I am Hopeful Because...***

Local PTA Units first register their unit at LouisianaPTA.org/reflections. The PTA unit then chooses which art categories their students will compete in. Students submit their completed works in one or all of the available categories: Dance Choreography, Film Production, Literature, Music Composition, Photography, Visual Arts.

Students must participate in their Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12), or Special Artist (students of all ages with an ADA Section 504). Students with the ADA Section 504 may enter in the Special Artist Division or the grade division most closely aligned to their functional abilities.

The Local PTA Unit submits their winners to LAPTA by January 22, 2024. Please set your deadlines earlier to give yourself enough time to pick your winners. All winners are submitted through an online portal. Local Units must be Actively Affiliated with LAPTA by October 27, 2023, for their students to participate.



Reflections Guidelines and Deadlines

- Local PTA Units first pre-register at surveymonkey.com/r/23-24RefRegistration to provide National PTA information on the number of Local PTA Units planning to participate.
- Go to LouisianaPTA.org/reflections** for all details, support documentation, and links. The PTA **must also register with Louisiana PTA** at form.jotform.com/231397127809160 or scan the QR Code.
- The Student Entry Portal link will be shared in the fall. This is the platform LAPTA uses to accept entries.
- Zoom training and written guidance will be provided by LAPTA.
- LAPTA accepts entries in all six Arts Categories. The Local PTA Unit can decide which Arts Categories their students can enter.
- Eligible Local PTA Units can submit three entries from each Arts Category per Grade Category to LAPTA for judging at the state level. If your school has more than one Grade Category, you may submit three entries for each Grade Category. The Grade Categories are Primary (Pre-K to Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12), and Special Artist (all students with an ADA Section 504).
- ENTRY DEADLINE to LAPTA is January 22, 2024**, through the online Student Entry Portal.
- There will be six LAPTA state winners per Grade Category per Arts Category announced on **March 1, 2024**. We will celebrate our winners in person at the LAPTA Recognition Ceremony n April 20, 2024!
- All information and forms are available at <https://LouisianaPTA.org/reflections>.
- Questions? Please contact us at arts.education@LouisianaPTA.org.



LAPTA OUTSTANDING PTA NEWSLETTER AWARD

Application Deadline: March 1, 2024
Winners Announced: April 20, 2024

Apply at form.jotform.com/221745628447059
Quantity Offered: 3

Louisiana PTA encourages all units to communicate with their members and community in some form whether it be a printed newsletter, electronic newsletter, or email blast. A newsletter is a great way to exchange news and ideas to bring PTA members closer to each other, to the school, and to all levels of PTA. Communicating information is a vital part of our personal and professional lives, and newsletters play a major role in that process.

Newsletters should be distributed to the entire school population by electronic communication, mail, or sent home with students. PTA membership should never determine if someone receives a newsletter. The name of the communication must identify that it is published by the PTA. The nameplate helps identify the newsletter, communicate its purpose, and invite recipients to read it. Keep the newsletter interesting, accurate, timely, and easy to read. Get an editor who is organized and diligent with excellent writing skills. There is no better way to get a parent to read a newsletter than by including their child's name in it.

Judge's Rubric (130 Possible Points)

- **General Design (25 points possible):** Frequency (5 pts); simple, easy to read, clear copy, well-spaced (5 pts); accurate and timely (5 pts); interesting to students and parents (5 pts); attractive layout and space utilized for PTA needs (5 pts)
- **Regular Articles (50 points possible):** President's monthly message (10 pts); Principal's monthly message (5 pts); monthly calendar of events (5 pts); other PTA news like programs, progress or reports of current PTA events and officers (10 pts); school news like messages from Superintendent, School Board members, and counselors, and events such as athletics, clubs, meetings, and assemblies (10 pts); National and Louisiana PTA news (10 pts)
- **Special Feature Articles (40 points possible):** Classroom or school projects (5 pts); educational workshops for Parents/Students (5 pts); parent education articles (5 pts); special events/workshops (5 pts); student/teacher recognition (5 pts); volunteer recognition (5 pts); State/National PTA Convention (5 pts); news from other advocacy groups and individuals (5 pts)
- **Extra Credit (15 points possible):** Student photos or drawings (5 pts); table of contents (5 pts); positive features not covered in above areas (5 pts)

To Apply for the Award

1. Collect all publications from July 1, 2023, through March 1, 2024, in chronological order and combine them into one PDF. A minimum of three publications is required. Only PTA newsletters or emails may be entered. See the Judge's Rubric for content ideas.
2. Go to <https://form.jotform.com/221745628447059> or scan the QR code. Complete the information and upload the document to the LAPTA Outstanding PTA Newsletter Award Application by March 1, 2024. The information needed is PTA Name, LUR#, school name and address, contact's email and phone, editor's name, and total publications between July 1, 2023, and March 1, 2024. Winners will be announced on April 20, 2024.



LAPTA ADVOCACY AWARD FOR LOCAL PTA UNITS

Application Deadline: March 1, 2024
Winners Announced: April 20, 2024

Apply at: <https://form.jotform.com/221794928286067>
Quantity Offered: 2

Local PTAs can apply for the Outstanding Advocates for Children (OAC) or Be the Voice (BTV) advocacy awards. Submit materials and documentation of the completed advocacy work **online by March 1, 2024**. Winners are announced on April 20, 2024 at the Recognition Ceremony.

Entry information includes Local PTA Name, LUR#, parish, and PTA contact's name, email, phone, and PTA position. Documentation of the advocacy work is uploaded, as well.

To be eligible for Outstanding Advocates for Children (OAC) Award or the Be the Voice (BTV) Award, Local PTA Units complete some of the *Building Awareness Activities* and some *Civic Engagement Activities*. The number of completed activities determines if the PTA is eligible for the 1st Place OAC Award or the 2nd Place BTV Award. The below lists are only suggested activities. There are countless ways a PTA can advocate! **Attach information or documentation of each advocacy activity when applying for the award.**

Building Awareness Activity suggestions are:

- Educate and communicate LAPTA legislative issues through social media, newsletters, programs, and other avenues to PTA members and the community at large.
- Share advocacy updates and information from LAPTA and how to sign up for the LAPTA newsletter.
- Share LAPTA advocacy alerts to membership.
- Host programs or family events. Pick a legislative priority topic and build a community event around that issue. For example, invite guest speakers, discuss topics, and have a related activity.
- Collaborate with other local PTAs.
- If appropriate, seek community partners and other association relationships to elevate your work.

Civic Engagement Activity suggestions are:

- Write letters or postcards to share your concerns or support regarding LAPTA legislative issues.
- Make phone calls to elected officials in response to LAPTA Legislative Alerts.
- Meet with legislator or legislative staffer to discuss LAPTA legislative priorities. Collaboration with other local PTAs is encouraged.
- Give legislators school tours to meet students, parents, counselors, teachers, and administrative staff. Discuss how PTA legislative issues impact your campus and community.
- Attend an event at the Louisiana State Capital.
- Attend other forums pertaining to public education, child health, and child safety that align with PTA's goals.



Submit application online at <https://form.jotform.com/221794928286067> or scan the QR Code by **March 1, 2024**. Winners will be announced on **April 20, 2024**.



LAPTA ADVOCACY AWARD FOR STUDENTS

Application Deadline: March 1, 2024
Winners Announced: April 20, 2024

Apply at: <https://form.jotform.com/221794914529163>
Quantity Offered: 2

LAPTA accepts applications for the Student Advocacy Award to recognize students who help to truly enhance public education. Students who are involved with civic engagement at an early age are the pillars of Louisiana's future! The Outstanding Advocates for Children (OAC) Award is the 1st Place award, and the Be the Voice (BTV) Award is 2nd Place award. Submit materials and documentation substantiating the completed advocacy work online.

Entry information includes Local PTA Name, LUR#, parish, student's contact information, parent's contact information, and PTA contact's name, email, phone, and PTA position. Documentation of the advocacy work is uploaded, as well.

Suggestions of Civic Engagement Activities are:

- Sponsored voter registration drive.
- Hosted voter education program.
- Hosted a program or campaign about a LAPTA legislative priority issue.
- Met with legislators representing student's school community.
- Created an online candidate questionnaire regarding PTA legislative priorities.
- Other community engagement.



Submit application online at <https://form.jotform.com/221794914529163> or scan the QR Code by March 1, 2024. Winners will be announced on April 20, 2024.



LAPTA VOLUNTEER OF THE YEAR AWARD

Application Deadline: March 22, 2024
Winner Announced: April 20, 2024

Apply at: <https://form.jotform.com/221787194277165>
Quantity Offered: 1

The volunteers across the state of Louisiana are truly the heart of the association. Recognize and thank that special person who goes above and beyond for all children, the one who acts as a tireless advocate for children's education, health, and well-being by honoring them with a Volunteer of the Year Award. This award recognizes one PTA volunteer who made a positive impact on the school and its children. This special person does not need to be the person who logs the most volunteer hours or is a PTA Executive Board member. Letters of recommendation are not required but will be accepted and considered if submitted.

Recognize the very best! Think of the people the PTA might like to honor with a Volunteer of the Year Award, people who care about children and have spent their lives caring about and devoted to the service of children and youth:

- A PTA leader, past or present
- The quiet, reliable, unassuming volunteer
- An outstanding teacher, perhaps one who is retiring this year
- A senior citizen who serves as a volunteer in the school
- A school crossing guard who ensures the children get to school safely for years
- A police officer or juvenile protection worker
- A legislator who has worked for laws benefiting children

Questions:

1. What makes the accomplishments of this nominee more significant than all other volunteers?
2. Describe the nominee's innovative or unique approach in performing volunteer service.
3. Describe how the nominee mobilized other volunteers or generated increased resources.
4. Describe the nominee's ongoing involvement rather than one-time activity.
5. Upload a picture of the nominee and the optional letters of recommendation.

Other needed information is PTA name and LUR#, PTA contact, nominee's contact information, and a picture of the nominee while volunteering, advocating, or doing PTA work.



Applications must be submitted online at <https://form.jotform.com/221787194277165> or scan the QR Code **by March 22, 2024. Winners will be announced on April 20, 2024.**



MENTOR-A-PTA AWARD

Application Deadline: March 22, 2024
Winners Announced: April 20, 2024

Apply at form.jotform.com/221777772070056
Quantity Offered: 2

LAPTA offers a Mentor-a-PTA Program where a strong, healthy PTA mentors a smaller, protected, or new PTA unit (Mentee) who needs a helping hand. They might share how to implement PTA values and goals through PTA best practices, guidance, and possible financial contributions. As we are all part of Louisiana, the success of one is the success of all. LAPTA encourages our Mentor PTAs to support the other PTAs that are not as strong or are in need. A Mentee PTA might like to sit in on a Board meeting or review agendas, Welcome Packet, membership forms, school flyers, and more.

Be a Mentor or Mentee

If your PTA would like to be paired up with another PTA as either the Mentor or the Mentee, please email Kayla Pagel at President@LouisianaPTA.org. There is no deadline for this.

How can you reach out to others in your community and state? The focus of this program is to mentor through guidance, planning ideas, monthly check-in, and leadership support. Mentors are upbeat, positive advocates who provide tools and direction to the Mentee PTA. If there is a financial contribution, then it must be approved by the General Membership and included in the annual budget. Give the members ownership in the philanthropic work of the PTA. Other non-financial support does not need approval, but always let the membership know the good work done behind the scenes.

Award Application



The Mentor-a-PTA Award recognizes philanthropic work from one PTA to another PTA. To nominate a PTA for the Mentor-a-PTA Award, apply online at <https://form.jotform.com/221777772070056> or scan the QR Code. The information needed is the PTA name and city, contact person's name, phone, and email, and a **good description of the philanthropic work** done by the nominated PTA.



NATIONAL PTA GRANTS

National PTA offers over 500 grant opportunities annually. Share with LAPTA any grants that the PTA receives so that the accomplishments can be celebrated! If you don't receive a grant the first time, apply again. Visit PTA.org, go under the *Run Your PTA* menu, and select *Award & Grant opportunities* for more information.

LOUISIANA PTA GRANTS

Louisiana PTA financially supports Local PTA Units that work tirelessly to help establish strong family-school partnerships in their community. LAPTA gives up to \$12,000 in grants to help engage families, support student success, improve the health and safety of students and families, increase arts education, and more. In addition to evaluating the merits of each application, we may also consider geographic need and other criteria to ensure a robust and diverse pool of grantees. To apply, complete the appropriate application later in this section.

TOP GRANT WRITING TIPS

For many organizations, grant writing is the most important component of their fundraising strategy. When trying to secure funding for a nonprofit, it is important to learn how to write a strong, successful proposal. The best grant proposals are clear, organized documents that illustrate why the PTA should receive funds from the grantor.

First and foremost, know the audience by getting to know the institution offering the grant. Consider its goals, values, and objectives. Understanding these elements helps to demonstrate how and why the PTA is a good fit. Research the eligibility expectations for each specific grantor and meet the minimum requirements. Compile a list of testimonials, recommendations, data sets, and success stories to include with the application. Every grantor is different, but they all want to know their money is being used wisely.



- **Know What Grants Exist and When to Apply.** Sign up for National PTA's newsletters at PTA.org/SignUp and bookmark the grants page at PTA.org/Grants.



- **Tell a Compelling Story.** Make sure all answers work together to highlight the PTA's strengths and mission or the reason why the PTA exists.



- **Share How the Grant Would Impact the School Community.** Identify an existing need in the school community and explain how the grant will address that need.



- **Show Enthusiasm.** Say how the grant will provide an exciting opportunity for the school and PTA.



- **Answer All Parts of the Question.** Include concrete, detailed examples and explanations that expressly answer the questions asked.



- **Promote Family Engagement.** Demonstrate how this grant will help to build stronger families in the community and encourage all families to attend the event.



- **Get a Second Set of Eyes.** Ask someone to proofread the proposal for spelling, grammar, and clarity before submitting the application.

Peek, Sean. "[How to Write a Grant Application for Your Organization.](#)" *USChamber.com*, February 5, 2021.

\$750 LAPTA LITERACY GRANT APPLICATION

Application Deadline: November 17, 2023
Winners Announced: December 1, 2023

Apply at form.jotform.com/221748002230038
Quantity Offered: 4 (One/category)

The LAPTA \$750 Literacy Grant 750 helps Local PTA Units host literacy programs or purchase literary items for the school library or a teacher's classroom library. Literacy skills in Louisiana are unacceptably low, and LAPTA and National PTA are making literacy opportunities a priority for our children. For program suggestions, see [PTA.org/home/programs/family-reading](https://pta.org/home/programs/family-reading). One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12). The following information is what is needed to apply.

Entry information includes Local PTA Name, LUR#, parish, mailing address, the Grade Category, and PTA contact's name, email, phone, and PTA position.

Requirements

- All grant funds must support age-appropriate programs for literacy skills.
- The program ideally should serve a majority of the school population.
- The funds will be used by May 24, 2024.
- Documentation of the spent funds must be emailed to submit@LouisianaPTA.org by May 24, 2024.

Questions

1. Describe how the PTA plans to spend the funds to increase literacy for their students. Include the purchased items, goals, supplies, volunteers needed, and any other details.
2. What are the top three literacy challenges for the children in the community?
3. If the school has a library, what is the name of the school librarian?
4. How will the program be publicized to parents, families, and the community before and after the event?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by May 24, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility for future grants.



Applications must be submitted online at <https://form.jotform.com/221748002230038> or scan the QR Code.



\$750 LAPTA HEALTHY MINDS GRANT APPLICATION

Application Deadline: March 27, 2024
Winners Announced: May 1, 2024

Apply at form.jotform.com/221748198534162
Quantity Offered: 4 (One/category)

The LAPTA Healthy Minds Grants encourage Local PTA Units to host mental health activities, events, or programs at their supported schools. It is important to support the mental health of all children before, during and after challenges arise and to support parents' and caregivers' mental health, too! National PTA developed the PTA Healthy Minds Program to empower families to make mental health an everyday priority.

National PTA has a new Mental Health Pilot Program and Louisiana was one of only a few to implement it! Jessica Latin was named as the Louisiana Healthy Minds State Champion. She is a licensed professional counselor and serves as the secretary for the Judson Warriors PTA in Shreveport, LA. Throughout the next few years, she will be empowering families with resources and tools to help them make mental health a daily priority! Follow her and learn more at PTA.org/HealthyMinds, search "Louisiana PTA Healthy Minds" on Facebook, or email Jessica at healthyminds@LouisianaPTA.org.

One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12).

Entry information includes Local PTA Name, LUR#, parish, mailing address, the Grade Category, and PTA contact's name, email, phone, and PTA position.

Requirements

- All grant funds must support an age-appropriate mental health activity, event, or program.
- The program should ideally serve a majority of the school population.
- The program will occur by December 31, 2024.
- Documentation of the implemented program must be emailed to submit@LouisianaPTA.org by May 24, 2024.

Questions

1. What is the name of the school counselor or Mental Health Provider?
2. What are the top three challenges for the MHP?
3. Describe the mental health program, event, or activity the PTA wants to host for their students. Include the goals, supplies, volunteers needed, and any other details.
4. What are the top three mental health challenges for children in the community?
5. How will the program be publicized to parents, families, and the community before and after the event?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by December 31, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.



Applications must be submitted online at <https://form.jotform.com/221748198534162> or scan the QR Code.

\$500 LAPTA DAY OF SERVICE GRANT APPLICATION

Application Deadline: March 1, 2024
Winners Announced: April 20, 2024

Apply at form.jotform.com/221748846538166
Quantity Offered: 4 (One/category)

The four LAPTA Day of Service Grants encourage Local PTA Units to reach beyond the school and into the community to make a difference. Where is there a need? Who needs the PTA? February 17 is the National PTA Founders' Day. How can you continue the rich legacy of National PTA? Perhaps you could partner with other aligned non-profits or agencies who serve populations like foster kids, food insecurity programs, the elderly, a community library, or an animal shelter. One grant will be awarded per Grade Category: Primary (Pre-K - Grade 2), Intermediate (Grades 3-5), Middle School (Grades 6-8), High School (Grades 9-12). The following information is what is needed to apply online.

Entry information includes Local PTA Name, LUR#, parish, mailing address, the Grade Category, and PTA contact's name, email, phone, and PTA position. Documentation of the advocacy work is uploaded, as well.

Requirements

- All grant funds must support a community outreach program.
- The school families must support the program.
- The program will occur by December 31, 2024.
- Documentation of the implemented program must be emailed to submit@LouisianaPTA.org by December 31, 2024.

Questions

1. What are the top three community goals for the school's administration?
2. Describe the community outreach or day of service program the PTA wants to host. Include the location, goals of the event(s), supplies, volunteers needed, and any other details.
3. What are the top three challenges for the group, nonprofit, or agency that you are trying to support?
4. How will the program be publicized to parents, families, and the community before and after the event?

The above PTA fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by December 31, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.



Applications must be submitted online at <https://form.jotform.com/232048704031142> or scan the QR Code.



\$500 LAPTA CREATIVE TEACHER GRANT APPLICATION

Application Deadline: April 1, 2024
Winners Announced: April 20, 2024

Apply at form.jotform.com/221796420623152
Quantity Offered: 2

LAPTA offers Creative Teacher Grants to classroom teachers to fund creative, innovative, and fun programs or projects for students. Grants may fund instructional and classroom materials, videos, parent involvement programs, or any activity or material which supports student enjoyment, wonder, and engagement. The hope is that this grant will result in fun and enriching projects or opportunities for the students that would not otherwise have been possible.

The proposal shall be clear and logical and include a specific objective; a creative or innovative approach; clear description of instructional procedures, methods, or treatments; and emphasis on student enjoyment, wonder, and excitement. The teacher or group of teachers must be current PTA members at their school. Funds must be used by December 31, 2024.

The information needed for the online application is contact information, applicants who are current PTA members at their school, and name of proposed project, including:

1. What will the project accomplish?
2. Which and how many students will the project serve?
3. How will the project specifically benefit the students?
4. What is fun, creative, and innovative about the project?
5. What are the complete details of the project?
6. How will the project be publicized to parents, families, and the community before and after the project?
7. Further support documentation or video uploads may be included to improve the application.

The applicant fully understands that if it receives this grant, the money shall not be used for other programs or activities except for those listed on this application form. A written evaluation of the efforts is due to submit@LouisianaPTA.org by December 31, 2024, unless an extension has been granted by the LAPTA President. The evaluation must contain all details pertaining to the use of the funds received under this grant including receipts of expenditures and any other supporting documentation. Failure to provide documentation requested as it pertains to this application may result in forfeiture of any or all grant funds and ineligibility of future grants.



Applications must be submitted online at <https://form.jotform.com/221796420623152> or scan the QR Code.

