

ACTIVE AFFILIATION REPORT: DUE OCTOBER 27, 2023

LouisianaPTA.org/activeaffiliation

Affiliation@LouisianaPTA.org

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Why are we here? Why do you PTA? To make every child's potential a reality by engaging and empowering families and communities to advocate for all children. PTA Values are 1) Collaboration, 2) Commitment, 3) Respect, 4) Diversity, and 5) Accountability.

What is Active Affiliation? It is the connection or legal relationship between National PTA, LAPTA, and the Local PTA Unit. Local PTAs need to annually submit required paperwork to LAPTA and then LAPTA submits paperwork to National PTA. To have "Active Affiliation" means that the Local Unit is current with its obligations to maintain its IRS status and National PTA affiliation.



The following items are individually uploaded into the corresponding field (do not combine files):

1. **MEMBERSHIP:** Submit member dues of \$3.50/person to LAPTA (\$2.25 to NPTA and \$1.25 to LAPTA) for each member at LouisianaPTA.org/membership; minimum of 30 memberships are required.
2. **LEADER REGISTRATION:** Register all Board members at LouisianaPTA.org/register. For the AA Report, list all elected officers, their position, and if they are registered. Example: Kayla Pagel, President, registered
3. **BYLAWS:** Submit the first page of Bylaws showing the LAPTA approval stamp. Bylaws expire every 3 years. The Bylaws Template at LouisianaPTA.org/bylaws allows certain details to be customized plus further amendments are allowed. See LAPTA Toolkit: Bylaws. Get a copy of your Bylaws at bylaws@LouisianaPTA.org.
4. **TAXES:** Submit proof of 2021 (or 2022) filed and accepted IRS Form 990 tax filing. LAPTA reports to the IRS which PTAs are exempt from federal income tax as 501(c)(3) charitable organizations. Any unit *not* listed is subject to INCOME TAX on all earnings. See LouisianaPTA.org/treasurer or LAPTA Toolkit: Treasurer for details on filing Form 990. 2022 taxes are due to IRS by November 15, 2023 for most PTAs.
5. **BUDGET:** Submit 2 pages: 1) Local Budget Approval Form **and** 2) the approved Annual Budget.
6. **AUDIT REPORT:** Submit the Audit Committee Report for the previous year. The Audit Committee of at least three people who are not bank signers reviews the books and completes the Audit Committee Report. This report is in the LAPTA Toolkit: Treasurer.
7. **ARTICLES OF INCORPORATION:** Submit the updated Articles of Incorporation from geauxbiz.com. The Louisiana Secretary of State requires all nonprofits to annually file the updated officer data and pay the \$15 renewal fee. Save the report to your files. Find out when your Annual Report expires.
8. **INSURANCE:** Submit the insurance declaration page. LAPTA now requires all PTAs to obtain adequate insurance protection against liability and fraudulent monetary loss. Purchase insurance coverage from any company such as Association Insurance Management (AIM), at (800) 876-4044 or AIM-companies.com.
9. **TRAINING:** Submit Proof of Training Certificates for all officers from LAPTA Development Day or at LouisianaPTA.org/training which lists Zoom trainings in September. Other Board members are encouraged to receive training especially since all Board members should understand the other positions and roles.

Retention Phase: If the report is not filed, then the PTA enters into the Retention Phase. 1) Notification: LAPTA gives 30 days to submit the missing items. 2) Restriction: Given a second 30-day period; not eligible for awards, programs, or grants by LAPTA or NPTA. 3) Intervention: After 60 days, the PTA signs a Plan of Action which designates new deadlines. 4) Restructure: LAPTA may choose to restructure the PTA leadership or move into the Dissolution Phase. 5) Dissolution: loss of the 501(c)(3) nonprofit status if Active Affiliation is not acquired for 3 consecutive years; PTA leadership refuses to implement the Plan of Action; or the PTA is not in compliance with PTA's Purposes and Principles. Bank accounts must be closed with any funds donated to a PTA.