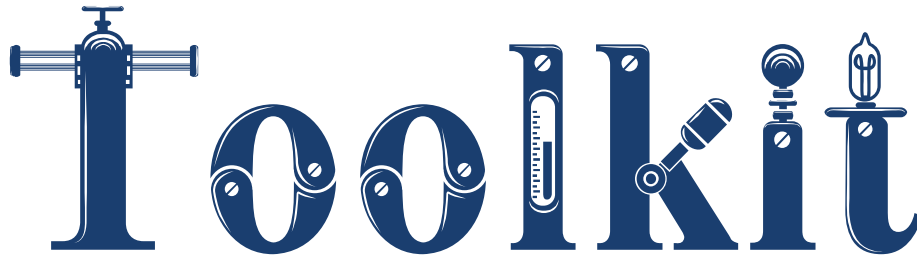


2024–25 PTA Leader



Section 5: Board of Directors



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VOLUNTEER FOR ADVENTURE

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

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

IMPORTANCE OF BOARDSMANSHIP

Serving on the Board of Directors (BOD) goes beyond mere administrative tasks and adhering to position-specific responsibilities. Exceptional Board Members understand that, alongside fulfilling the stipulated requirements within the PTA’s governing documents, certain skills are vital for a smoothly operating Board, including maintaining a unified voice and fostering collaboration. It’s crucial to be mindful of how the decisions and actions of individual Board Members reflect upon the perception of the entire Board within the PTA membership, prospective PTA members, leadership, school staff, and the community. Regardless of differing opinions within Board meetings, the BOD should present a unified front. Failing to do so would undermine support for PTA initiatives and programs, as well as hinder meaningful contributions to the school community.

Collaboration is equally essential and necessitates that each Board Member works in harmony, supporting one another’s efforts. The structure of the Board and its committees, along with parliamentary procedures to ensure equitable participation, fosters a collaborative atmosphere when conducting PTA business. It’s imperative to collectively shoulder the responsibility for all PTA actions, communications, programs, and events to project a favorable image of the PTA. From an external perspective, there should be no discernible distinctions between the responsibilities of Board Members. The PTA’s reputation is reflected upon the entire Board, not on specific individuals. When Board Members effectively carry out their duties and engage in meetings, they contribute to establishing respect and support for the PTA within the school community.

Building positive relationships is pivotal in cultivating a unified voice and collaboration, among other essential skills. Strong, healthy relationships among Board Members are the cornerstone of successful and enjoyable PTA work. These relationships are founded on mutual trust, respect, a sense of accountability, valuing one another, and open communication. Furthermore, it’s important to recognize that the PTA’s relationships with school staff, the district, families, and the wider community are crucial to the PTA’s prosperity. Effective management of these skills, alongside the specific Board responsibilities, guarantees the success of the PTA and produces outstanding PTA leaders.

2024–25 LAPTA CALENDAR (Subject to Change)

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

July 2024

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

August 2024

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

September 2024

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

October 2024

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

November 2024

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

December 2024

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

January 2025

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

February 2025

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

March 2025

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

April 2025

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

May 2025

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

June 2025

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

BRIEF CHECKLIST FOR LOCAL PTA UNITS

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

- We read our Bylaws which are updated every 3 years. The Bylaws' expiration date is _____.
- The Board of Directors (BOD) each created a personal account at PTA.org.
- The BOD reviewed LouisianaPTA.org and submitted their contact information at LouisianaPTA.org/register.
- All Committees submitted a Plan of Work at the beginning of the year to the Executive Committee.
- BOD attended LAPTA Leadership Training. See LouisianaPTA.org/training.

2. PRESIDENT (LouisianaPTA.org/president)

- We created a calendar of events in collaboration with the school's administration.
- Robert's Rules of Order, Newly Revised governs all meetings. General Membership Meetings are held in the months of _____ and BOD meetings are held in _____ as per the Bylaws.
- All meetings have agendas. The secretary records the minutes and presents them at the next meeting.
- Quorum for General Membership Meetings is _____ and for BOD Meetings is _____.
- Motions are recorded and seconded before discussion takes place and end with a vote.
- The Active Affiliation Report due date to LAPTA is _____. See LouisianaPTA.org/affiliation.

3. TREASURER (LouisianaPTA.org/treasurer)

- We adopted a balanced budget by vote of the General Membership on _____ date.
- Amendments to the budget are approved by a vote of the General Membership.
- We paid our insurance renewal on _____ and have received our insurance certificate.
- Budget Reports and monthly reconciliation reports are presented and filed at all meetings.
- Fundraisers are planned to support our programs, activities, and leadership training.
- All expenses are signed by 2 authorized PTA signatories. Signatories are appointed by motion.
- Monthly bank statements are reviewed and signed by a non-signatory.
- The Audit Report is presented at the first meeting of the year. It is due to LAPTA with the affiliation report.
- The deadline to file the IRS Form 990 is _____ which is 4.5 months after the close of the fiscal year.

4. SECRETARY (LouisianaPTA.org/secretary)

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

5. MEMBERSHIP (LouisianaPTA.org/membership)

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

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

- We include advocacy efforts in our annual plans as this is the core purpose of PTA.
- We include the mission of PTA when we pick the programs and events in our annual plans.
- We follow the 3-to-1 rule of three planned programs for every one fundraising activity.
- We participate in the Reflections Arts Program and recognize our program winners with awards.
- We support student success by promoting the National Standards for Family School Partnerships.
- We seek to partner with our teachers, principal, school board, and community.

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

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

BEING A BOARD OF DIRECTORS' MEMBER

The PTA Board of Directors plays a pivotal role in shaping the operational framework for everyone involved. This group comprises dedicated volunteers who are active members of the PTA and have either been elected or appointed to lead committees. Their collaborative efforts center on defining objectives for the Local PTA Unit and devising strategies to achieve these aims. Successful teamwork hinges on fostering mutual respect, empathy, dedication, and a comprehensive understanding of individual roles and responsibilities.

PTA Board Members are required to embrace and uphold the mission, objectives, values, and policies of both the National PTA and LAPTA. Within 30 days of the commencement of their service term, they must become paid members of their Local PTA Unit. Their involvement is purely voluntary, with no financial compensation, except for reasonable expense reimbursements in accordance with PTA policies and budget. Furthermore, these members are obliged to annually affirm their commitment to the Confidentiality, Ethics, and Conflict of Interest Policy. Each BOD member is limited to holding a maximum of two roles. Elected officers may only hold one elected position. The Board of Directors consists of the elected officers, 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 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 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 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 BOD, and maintaining confidentiality.
- **The duty of obedience** requires adherence to the law, and the PTA's mission and governing documents, including 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 members of the Board are expected to arrive well-prepared for a productive Board meeting. Beyond having their respective position reports ready for sharing, each Board Member carries additional responsibilities during the meeting. They should come ready to actively engage in the discussions and carefully review any materials distributed before the meeting, including the agenda, minutes, and financial reports. In the proceedings, the Board adheres to parliamentary procedures, ensuring that every member has a fair and constructive platform to voice their opinions. Participation in these gatherings entails both speaking and listening attentively.

It is important to note that Board meetings are exclusive, closed sessions. Any discussions or viewpoints exchanged during these meetings are to be held in strict confidence. Upholding this confidentiality not only fosters trust among Board Members but also maintains the sanctity of these meetings as a secure space for sharing diverse perspectives, essential for making well-informed decisions. Only members of the Board are permitted to attend these meetings. However, if anyone seeks to address the Board of Directors, they can request permission from the President for a courtesy seat. Such individuals may observe the proceedings, pose questions, present reports, or provide information, but once their engagement is complete, they must exit the meeting. Non-Board Members do not have the privilege of participating in discussions 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. The Bylaws contain further details.

LEADERSHIP TRAITS

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

- **Self-Awareness:** The ability to acknowledge one's strengths and weaknesses.
- **Vision:** Demonstrate a deep understanding of future goals and the roadmap to achieve them.
- **Relationship Building:** Cultivate trust, mutual respect, and an appreciation for diversity.
- **Critical Thinking:** Gather relevant information, identify problems, and implement effective solutions.
- **Time & Resource Management:** Skillfully prioritize tasks and resources to achieve objectives efficiently.
- **Motivation:** Inspires and fosters enthusiasm and interest among team members.
- **Empathy:** Sensitive to the emotional cues, needs, and concerns of others, both spoken and unspoken.
- **Creativity:** Innovatively generate ideas, alternatives, and novel approaches to problem-solving.
- **Communication:** Actively listen and convey information concisely and accurately.
- **Collaboration:** Work harmoniously as a team and prioritize the collective over the individual.
- **Delegation:** Share responsibilities, provide guidance and follow-up, and nurture leadership in others.
- **Continuous Learning:** A commitment to personal growth and acquisition of new skills and knowledge.
- **Integrity:** Uphold ethical standards and do what is right, even when unobserved.
- **Initiative:** Take proactive steps without external prompting, consistently deliver outstanding performance.

QUORUM

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

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.

- All Board Members must be a paid PTA member during the school year for which they serve.
- 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. The Standing Rules are done by the current Board.
- Follow LAPTA and National PTA on social media.
- Familiarize yourself with the entire website at LouisianaPTA.org.
- Create a profile on the National PTA website at PTA.org. Having an account gives access to the PTA Local Leader Kit and an incredible amount of resources.
- Sign the Confidentiality, Ethics, and Conflict of Interest Policy annually.



Duties at a Glance

- 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 and Standing Rules.
- Review the requirements for the LAPTA Active Affiliation Report at LouisianaPTA.org/affiliation.
- 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.
- 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 all funds to the Treasurer pertaining to the office.
- Keep a procedure binder to pass on to succeeding officers. Transfer to succeeding officers quickly.
- Protect members' privacy by not distributing membership lists to outside interests.
- Answer correspondence promptly.
- Stay informed by reading the publications of the PTA.

EXECUTIVE COMMITTEE

The Executive Committee comprises the PTA's elected officers, and their primary role is to support the President in achieving the PTA's objectives. The specific responsibilities of these officers are outlined in the Bylaws.

1. The **President** oversees the PTA's operations and works in collaboration with the other members of the Executive Committee, Board of Directors, and General Membership.
2. The **Vice-Presidents** assist the President and may be tasked with managing specific programs, such as Membership, Legislation, or the Reflections Program. They can act as substitutes for the President only when authorized by the President or by the Board of Directors in cases where the President is unable to preside.
3. The **Treasurer** serves as the custodian of PTA funds, receiving and disbursing money as specified in the Bylaws or as authorized by the PTA. See the LAPTA Toolkit's Treasurer section for details.
4. The **Secretary** maintains accurate records of PTA proceedings and serves as the guardian of PTA records. For a comprehensive understanding of the Secretary's responsibilities, consult the LAPTA Toolkit's Secretary section.



COMMITTEES

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

It's essential to note that committees possess authority only as explicitly granted to them. They are not independent entities but integral components of the PTA, functioning within the parameters established by the PTA's Bylaws, policies, and procedures. All undertakings and endeavors must receive prior approval from the Executive Committee. Committees work effectively on many tasks. 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.

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.

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

The Advocacy Committee serves PTA members by providing them with information on current legislative matters, promoting active engagement in local, state, and national government affairs. It also advocates for the PTA's stance on proposed laws that impact the well-being and education of children, collaborating with legislators at all levels, and partnering with like-minded organizations. See LouisianaPTA.org/advocate.

The Budget Committee is responsible for formulating the PTA's budget, with the Treasurer serving as the chair. Additional members, as per the Bylaws, are appointed. This committee conducts a comprehensive review of the previous year's budget and the Treasurer's reports to assess its alignment with the unit's needs. The Treasurer presents the budget to the BOD for suggestions and edits, and then the General Membership for approval. Any future amendments must be approved at a General Membership Meeting with an affirmative two-thirds vote.

The Bylaws Committee is responsible for examining and updating the LAPTA Bylaws Template, making note of the most recent LAPTA approval date stamped on the cover page. It is mandatory to review, revise, and submit the Bylaws to LAPTA for approval every three years. See details at LouisianaPTA.org/Bylaws.

The Communications Committee plays a crucial role in keeping PTA members and school families informed about PTA initiatives and ways they can get involved. It raises public awareness, fosters understanding, and garners recognition and support for PTA's goals and programs. Discover valuable tips and best practices for effectively conveying messages by visiting PTA.org/local-leader-kit/communications.

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

Diversity, Inclusion, and Outreach (DIO) Committee works to build an organization that recognizes diversity and values differences and similarities among people through its actions and accountability. PTAs authentically represent their communities when they respect differences, acknowledge shared commonalities, and develop meaningful priorities based on that knowledge. Visit PTA.org/home/run-your-pta/Diversity-Equity-Inclusion.

Education Committee focuses on the enrichment 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](https://pta.org/home/family-resources) and [PTA.org/home/run-your-pta/how-we-pta/access-to-opportunities](https://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 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. 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 while reflecting the PTA's high principals. See [PTA.org/local-leader-kit/fundraising/mission-driven-fundraising](https://pta.org/local-leader-kit/fundraising/mission-driven-fundraising).

Healthy Lifestyles Committee educates parents about the physical, mental, and emotional health needs of children. It is the shared responsibility of families, schools, and communities to develop the "whole child." Visit [PTA.org/home/programs/Healthy-Lifestyles](https://pta.org/home/programs/Healthy-Lifestyles), [PTA.org/home/run-your-pta/how-we-pta/social-and-emotional-well-being](https://pta.org/home/run-your-pta/how-we-pta/social-and-emotional-well-being), and [PTA.org/home/run-your-pta/how-we-pta/addressing-food-insecurity](https://pta.org/home/run-your-pta/how-we-pta/addressing-food-insecurity) for info on food insecurity.

Student Involvement & Leadership Committee gives the students 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](https://pta.org/home/run-your-pta/ptsa-resources).

Hospitality Committee develops a spirit of friendliness among members and others who may attend meetings. It assists in discovering special talents and interests among members, organizes special events, and fosters a feeling of belonging among members. See [PTA.org/local-leader-kit/leadership/lead-the-pta-way](https://pta.org/local-leader-kit/leadership/lead-the-pta-way).

Male Engagement Committee focuses on the importance of father figures in the success of children. Increased male involvement causes student grades and test scores to improve, attendance to increase, and more student involvement in school activities. See [Supporting-multicultural-membership-growth/Male-Engagement](#) and the "[ABCs of Male Involvement Handout](#)."

Membership Committee builds an active membership and conducts the year-long membership campaign. A growing and engaged membership is the foundation for achieving the PTA's mission. 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.

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 two years, she will be empowering families with resources and tools to help them make mental health a daily priority. 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 for students and their families. National PTA provides free, in-depth programs for PTAs to implement. See [PTA.org/home/programs](https://pta.org/home/programs) and [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 have parents and teachers cooperate in the education of children and youth.

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

VIRTUAL MEETINGS

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

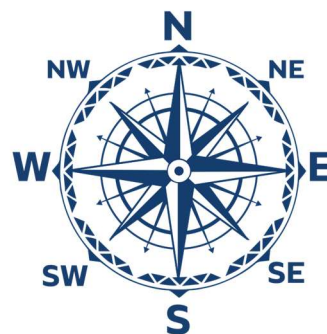
SETTING GOALS

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, and 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.

PROCEDURE BINDER

A Procedure Binder holds a central role within PTA operations, yet it often remains underutilized. LAPTA strongly encourages all officers and chairs to maintain a meticulously detailed Procedure Binder. The binder serves as a valuable tool to identify tasks, outline a clear course of action, and offer quick insights into the history and responsibilities of each position. It belongs to the PTA and not to the individual utilizing it. Each binder can serve for multiple years and should be regularly updated. It should include calendars, LAPTA dates, Bylaws, Standing Rules, LAPTA Toolkits, monthly budgets, Board roster, Expense and Deposit Forms, financial reports, agendas, minutes, and details specific to the Board position.



EMAIL PROTOCOL

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

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

Keep messages short when possible. Proofread the email and check for tone and for wording that can be interpreted in a divisive way. Respond to email as soon as possible but not later than 3 days. Email should be courteous, concise, clear, kind, and spelled checked. When sending emails to a large list of people, use an email service such as MailChimp which is free and use the BCC feature. This way the recipients do not see everyone else's email address and it is convenient and organized.

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 review of the PTA'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 need an approved plan of work as they operate throughout the school year.

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

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

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

Boards succeed when they have a planned rotation. Rotation of new members 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, interview potential nominees, and a planned working procedure.

LEADERSHIP DEVELOPMENT AND TRAINING (REQUIRED)

All elected officers for Local PTA Units need to annually complete 4 credits of PTA training. Proof of training is required for Active Affiliation which is detailed at LouisianaPTA.org/affiliation. All Board Members are encouraged to receive training. Board Members should understand the other positions and roles within the Board. Proof of Training Certificate is available at LouisianaPTA.org/training. Sources for training are:

- **LAPTA Leadership Development Days:** LAPTA offers in-person training and development in southern and northern Louisiana in August. Local units will receive registration information from LAPTA. Make sure all officers register every year with LAPTA as soon as they are elected at LouisianaPTA.org/register.
- **LAPTA Zoom Training Meetings** are held in September. The recordings are posted at LouisianaPTA.org/training.
- **LAPTA Individualized Training:** LAPTA also offers one-on-one training as needed. Contact LAPTA President at President@LouisianaPTA.org to schedule a meeting.

FINANCE FOR BOARD MEMBERS

The Internal Revenue Service (IRS) requires nonprofits to uphold a “fiduciary duty.” Fiduciary is defined as a person to whom property or power is entrusted for the benefit of another. Board Members have three fundamental fiduciary duties:

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

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. 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. An approved budget is always required for expenditures to be made and fundraisers to be conducted.

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 just 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 sign and keep a copy of the completed Deposit Form. The Treasurer may be one of the two counters.

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

Each bank statement is reviewed and signed by a person not authorized on the bank account. The Treasurer presents the bank statements for review at Board meetings.

A financial audit 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 may not be the incoming Treasurer, an authorized signer, nor related by blood or marriage or reside in the same household as an authorized signer.

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.

COMMUNICATIONS AND SOCIAL MEDIA

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

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

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

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

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

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

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

Privacy and Permission: PTAs should refrain from posting photographs or images of volunteers, families, children, etc., on social media without obtaining their explicit consent. Secure written consent forms at events or at the start of the school year, granting the rights to use and share pictures. Prioritize and exercise caution with child and family privacy. Avoid discussing situations on social media that could identify individuals. When sharing content from other sources, assume it is copyrighted and provide proper source citation or link to the original material. Ask the insurance company about additional coverage for Media Liability to address online liability issues.

- Adhere to PTA policies regarding noncommercial, nonpartisan, and nonsectarian content.
- Use the PTA logo in all communications and state when someone is speaking on behalf of the PTA.
- Create visually interesting communications with careful use of photographs, bullets, quotes, and graphics.
- Posts should be PTA-related such as flyers, events, grants, PTA and school deadlines, and other information valuable to PTA members. Keep the message brief and to the point with current information.
- Have at least two administrators for each. Have 2 or 3 people proofread before posting.
- Do not include photographs of or specific information about adults or students without written permission.
- Abide by copyright laws and republish articles and art in an ethical manner.

CONFIDENTIALITY, ETHICS, AND CONFLICT OF INTEREST POLICY

Members of the Board of Directors serve in a **fiduciary capacity** and owe a **duty of care**, a **duty of obedience**, and a **duty of loyalty** to the PTA. Board Members shall conduct themselves with **integrity** and **honesty** and act in the **best interests** of the PTA. Disclosure by a Board Member of any potential or actual conflict of interest is required by the standard of good faith and for the benefit of the PTA and protection of everyone.

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. Board Members shall not use PTA's name, influence, or resources for their benefit or gain when running for any publicly elected office or while serving as an elected official.
 - e. Board Members shall not directly or indirectly use their current PTA name or position for or against any specific candidate for elected public office, as that would be contrary to federal tax laws and PTA policies.
 - f. **At a Board Meeting, the conflict of interest is declared and debated.** During discussion and deliberation, the person temporarily leaves the meeting. The Board Member with the conflict may not use their personal influence of position to impact the outcome of a vote. The Board discusses the conflict and then makes a motion to allow the Board Member to continue on the Board or to be removed from the Board. The person returns after the vote is complete and informed of the results. **The minutes of the meeting shall note any declared conflict of interest, the motion made to accept or remove the person from their position on the Board, and the resulting vote. Removal of a Board Member is effective immediately. They shall turn over to a member of the Executive Committee all records, books, PTA account access, and any other PTA materials pertaining to their position.**

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

ACTIVE AFFILIATION REPORT ***VERY IMPORTANT***

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



DUE OCTOBER 31, 2024

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

1. MEMBERSHIP: Submit proof of paid dues which are paid to LAPTA at LouisianaPTA.org/membership.
2. LEADER REGISTRATION: Register all Board Members at LouisianaPTA.org/register. Officers are required.
3. BYLAWS: Submit the first page of the Bylaws with the LAPTA approval stamp.
4. TAXES: Submit proof of 2022 or 2023 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.
9. TRAINING: Submit proof of training for officers from LAPTA training or see LouisianaPTA.org/training.

RETENTION PLAN

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

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

Visit LouisianaPTA.org/affiliation for details.

PARTNERING WITH ADMINISTRATORS

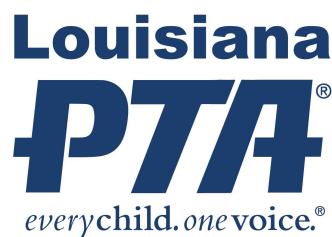
Engage purposefully and build a strong partnership with the school's principal by doing the following.

- **Collaborate on Planning:** Work together to establish administrative goals and to explore how the PTA can actively involve families in providing support.
- **Tap into Available Resources:** Discuss how LAPTA and National PTA programs and resources can enrich and reinforce student learning. You can find these resources at [PTA.org/programs](https://pta.org/programs).
- **Maintain Professional Communication:** Maintain a respectful and professional dialogue with the school's leadership even in cases of disagreement.
- **Emphasize Independence:** Help school administration recognize that the Local PTA Unit operates autonomously as a child advocacy group while being a part of and benefiting from a larger, experienced National association.
- **Establish Regular Contact:** Consider scheduling regular monthly meetings over coffee or lunch with the principal or arranging periodic phone calls. Extend invitations to the superintendent to attend Board meetings and maintain effective and routine communication.
- **Increase Visibility:** Encourage the principal to provide reports during PTA meetings, contribute articles to the PTA newsletter, or write posts for the PTA blog. Organize inclusive events like "Chat with the Principal" or "Coffee with the Superintendent."
- **Promote Family Engagement:** Share the National PTA Standards for Family-School Partnerships materials and collaborate on enhancing family engagement to improve student success. Consider participation in the National PTA Schools of Excellence program.
- **Support Budget Participation:** Empower parents with the information they need to effectively advocate during the school's budgeting process. Assist parents in advocating for the education budget.
- **Maintain Alignment:** After phone calls and meetings, ensure follow up by summarizing discussions and confirming any action steps to be taken by the PTA or administration.
- **Request Participation in Teacher Meetings:** Request the opportunity to address teacher meetings, emphasizing the PTA's role as an educational partner and a vital link between home and school.

Don't:

- **Be adversarial.** Find common ground. Model civil discourse, even if they are difficult to deal with.
- **Comingle funds.** Mixing private and public funds is forbidden and illegal.
- **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 runs the PTA meeting, in compliance with PTA Bylaws and using Robert's Rules of Order.
- **Get in trouble with the IRS.** Know the IRS rules. PTA's funds are not school funds. Only use the PTA's EIN.
- **Open the PTA to theft.** No administrator wants to deal with the negative publicity surrounding a PTA's poor money management. Ensure financial reports and audits occur regularly. Follow all money handling rules.
- **Entangle administration in personality issues.** Sometimes personal issues interfere with PTA function. 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.

See more operating guidance and best practices at LouisianaPTA.org/guidance.



PARTNERING WITH TEACHERS

The success of the PTA hinges on the strong partnership between the PTA and the school's educators. Engage purposefully with the teachers by using the following guidelines.

- **Collaborate on Planning:** Working together builds strong relationships. Involve parents and the community in supporting teachers.
- **Invite Teacher Engagement:** Encourage teachers to attend meetings and share their insights. Explore ways to involve teachers who may not be able to attend in-person meetings. Create a campaign that emphasizes the value of PTA for teachers and encourages them to become members.
- **Identify Volunteer Opportunities:** Collaborate with teachers to identify volunteer opportunities related to classroom and extracurricular activities. Recruit volunteers to assist with these opportunities.
- **Show Respect:** Express your appreciation for teachers and let them know that the PTA values their contributions. Build a positive working relationship between home and school to improve students' success.
- **Solicit Feedback:** Seek input from teachers regarding the impact of PTA initiatives and the success of PTA programs. Encourage teachers to provide suggestions for improvement through surveys and other channels.
- **Foster a Sense of Community:** Organize informal social gatherings, fun nights, family sporting events, and outings to promote and increase relationships beyond the classroom.
- **Express Appreciation:** Thank teachers for their support of the PTA and their dedication to children's well-being. Plan meaningful activities during Teacher Appreciation Week and acknowledge their hard work.
- **Demonstrate Cooperation:** Recognize that the PTA-teacher relationship is a partnership aimed at supporting teachers. Approach all interactions with teachers in a spirit of cooperation and collaboration.

Don't:

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

See more operating guidance and best practices at LouisianaPTA.org/guidance.

