



Louisiana PTA Leadership Training

Mandeville on August 16, 2025

Shreveport on August 23, 2025

LouisianaPTA.org/training



Training Schedule

8:30	Registration Opens	10:50	Annual General Membership Meeting
9:00	Welcome from LAPTA & Superintendent	11:00	Workshops: 1) Finances 2) Meetings 3) Givebacks
9:15	Icebreaker Trivia	12:00	Lunch & Learn (Fam Eng Task Force; KIT Kids)
9:25	Big Picture of PTA & PTA Culture	12:45	Who Wants to Be a Millionaire Treasurer
9:40	Discussion: Programs, Committees, & Fundraising	1:00	Awards, Grants, Contests, & Healthy Minds
10:15	Membership Family Feud	1:20	Roundtable Discussions & Networking
10:30	Affiliation Jeopardy		

LouisianaPTA.org Website Overview

Below are the main menu items and the pages under each.

LAPTA:

[Blog](#) – Past Local Leader emails
[Board](#) – LAPTA contact information and bios
[Calendar](#) – LAPTA dates
[Gen Memb Meetings](#) – LAPTA Agendas and Minutes
[History](#) – LAPTA is 103 years old this year!
[Register](#) – Required registration for officers
[Shop PTA](#) – Buy official PTA gear like tablecloths & more

Run Your PTA:

[Affiliation](#) – Details & upload links
[Blog](#) – Past Local Leader emails
[Board Members](#) – Overview for BOD and committee types
[Bylaws](#) – Bylaws Template, instructions, and timelines
[Elections](#) – Details with scripts, forms, and Toolkit
[Fundraising](#) – Fundraising ideas; please share your wins!
[Givebacks](#) – Details, tips, links
[Meetings](#) – Documents and scripts
[President](#) – Toolkit, navigate links, and more
[Vice-President](#) – PTAs set all other duties for their VPs.
[Treasurer](#) – Quick access to forms, training, Toolkit, etc.
[Secretary](#) – Forms, training, Toolkit, etc.
[Students](#) – Reflections Theme entry, Reflections forms
[Toolkits](#) – PDF and Word files for Toolkits
[Reflections](#) – Details, downloads, forms, past winners
[Register](#) – Required registration for officers
[Resources](#) – Helpful apps & info; all Canva templates

Membership:

[Grow Membership](#) – Tools to grow membership

[Submit Dues](#) – Details on Givebacks and links
[Join PTA!](#) – Links to local PTA membership purchasing
[Monthly Challenges](#) – Based on % of goal
[Annual Awards](#) – Awards for Local PTAs from LAPTA
[Start a PTA and Dissolve a PTA](#)
[Member Perks](#) – National PTA perks
[Lagniappe PTSA](#) – Statewide PTSA anyone can join
[Inclusion & DIO](#) – Reach the entire community

Programs:

[Advocate](#) – LegCon, Awards, Elections Guidance
[Awards](#) – Volunteer, Monthly Challenges, Toolkit
[Contests](#) – Safety Poster, Reflections Theme, Reflections
[Family Engagement](#) – Six National Standards
[Grants](#) – LAPTA grants, National PTA grants
[Healthy Minds](#) – Jessica Latin; articles, resources
[Programs](#) – Events that make a difference; NPTA Programs
[Reflections](#) – Arts Program for students
[Special Education](#) – Support for SPED children

Learn:

[LAPTA Training](#) – Required for officers
[National PTA Training](#) – Courses on Thrive.PTA.org
[Resources](#) – Helpful apps & info; all Canva templates
[Toolkits](#) – All toolkits as PDFs and some Word files

Partnerships:

[Friends of LAPTA](#) – Paid sponsors for LAPTA
[Mission Partners of LAPTA](#) – Nonprofit collaborations
[Vendors](#) – Sign up for in-person events

PTA Culture & Successful Leadership

Jennifer Hale, LAPTA VP of Leadership Development
Leader.Develop@LouisianaPTA.org

Big Picture – What is PTA?

LAPTA proudly serves as a member of the Louisiana Department of Education's Parent and Family Engagement Task Force. The LDOE acknowledges the powerful role families play in a child's educational journey. Research consistently shows that when families are engaged, students earn better grades, attend school more consistently, and are more likely to graduate. PTAs are at the heart of this priority. They advocate for every child, fund essential programs, and create a strong network of caring adults committed to helping students thrive. When PTAs are active, students succeed.

Represent the PTA brand with intention and integrity. Create a welcoming PTA culture by focusing on relationships. Look for needs and take the lead in finding solutions. Be intentional about connecting with parents, students, staff, and the community. Greet people at events, introduce yourself, and invite them to join PTA. Share ways they can get involved. When people feel seen, valued, and connected, they're more likely to engage and that's when the magic happens.

Leadership Skills

Leadership skills include intelligence, self-confidence, determination, integrity, motivation, and sociability. Emotional Intelligence includes social awareness, self-awareness, self-regulation, and successful relationship management. Pace yourself, delegate, and avoid burning out. Evaluate your strengths and weaknesses of the following:

- 1) Technical Leaders possess specialized skills and excel in managing day-to-day operations. They are detail-oriented, efficient at completing tasks, and adept at following directions. Their focus is on functionality, problem-solving, and ensuring assignments are completed accurately and on time.
- 2) People Leaders excel in building relationships and nurturing a positive team culture. They understand their team members as individuals, fostering an atmosphere of trust, empathy, and open communication. These leaders are skilled at adapting ideas to meet the needs of others and are attentive to the emotional and social dynamics within a group or organization. They value collaboration and work to ensure that every voice is heard.
- 3) Conceptual Leaders are visionary thinkers who focus on the big picture. They are driven by ideas, purpose, and long-term impact and enjoy working with abstract concepts, crafting strategies for growth, and defining the values, mission, and philosophy of an organization. They are skilled at visualizing systems, setting goals, and designing workflows that support innovation and sustainability.

Conflict Management

Most conflict tends to revolve around **communication breakdowns**. Engage in direct conversations with the involved parties to get to the root of the issue. Pick up the phone. To effectively problem solve, cultivate an open and friendly environment and respect others; clearly define expectations for desired outcomes; offer private correction and public recognition and praise; actively listen to all parties involved; and investigate problematic situations from multiple perspectives. Set boundaries. Don't give them power over your happiness. Don't pick up what they're putting down. Be direct and brief when communicating. Use the new Termination of Membership for truly difficult people and know that it might lead to lawsuits. See the Dignity Index for guidance on how to best handle disagreements and hurt feelings.

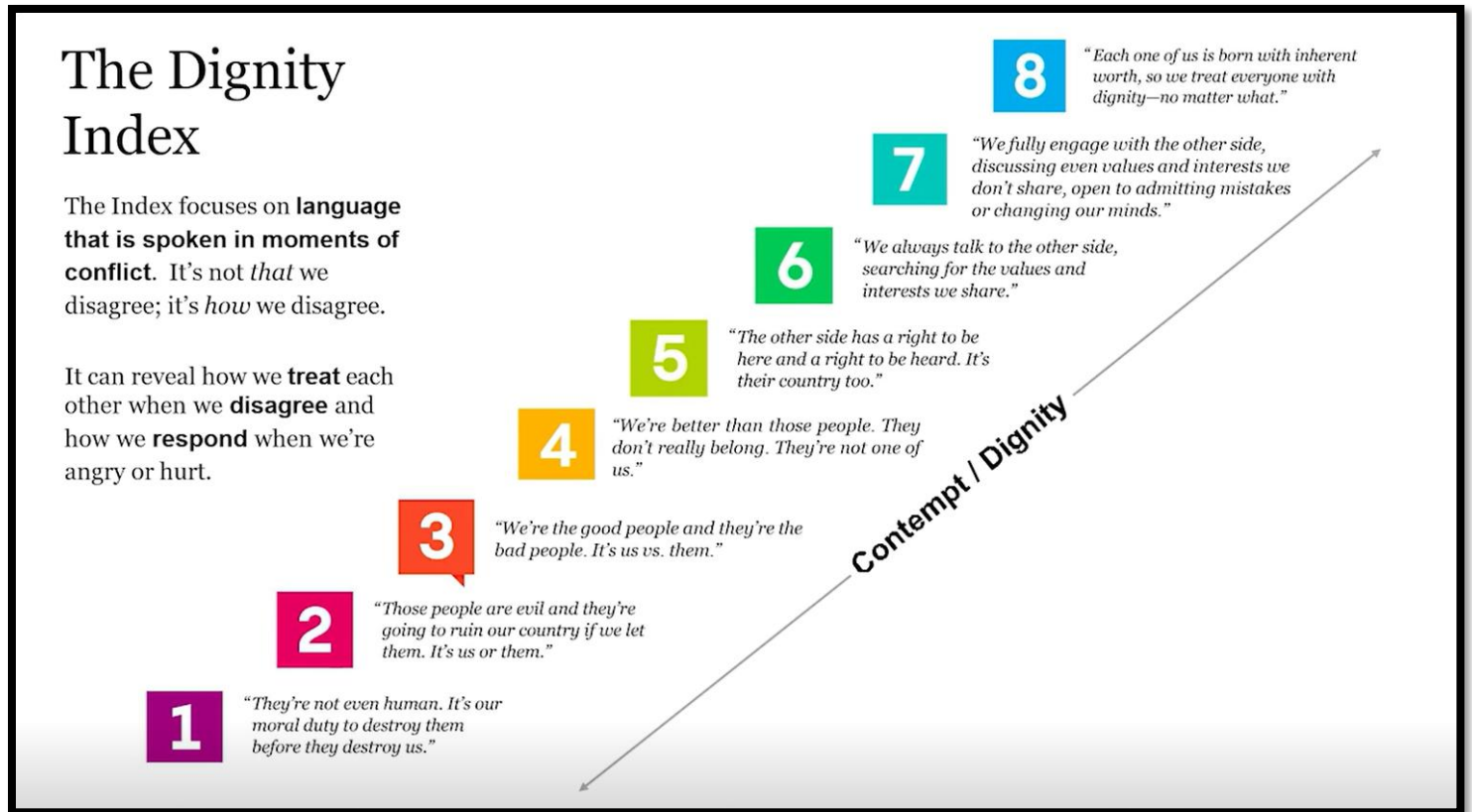
For school level complaints, the PTA does not have the authority to address those. Direct the person to the school district's official policy. Typically, the "chain of command" is 1) teacher, 2) principal, 3) principal's supervisor, 4) superintendent, and 5) school board. Managing conflict effectively can quickly yield positive outcomes.

Plan for Future Leaders

Always look for future leaders. Build the pipeline now. Identify role needs and skill sets. Build a path that starts easily at the base level and works up to bigger roles. Identify people who bubble to the top and then build relationships with them, pointing out their potential. Keep communicating with them because it takes time for people to see how they might fit. Build a respectful and trusting culture that people want to be a part of.

The Dignity Index (www.dignity.us)

The desire to be treated with dignity (*just after the instinct to survive*) is one of the most powerful drivers of human behavior for all people. Honoring the dignity of others creates relationships with strong foundations and is key to successfully working with people of differing dispositions and viewpoints. The Dignity Index focuses on language that is spoken in moments of conflict when people disagree, which can be contemptuous or dignified.



The 10 Elements of Dignity

1. Accepting Dignity – Approach people as an equal. Allow others to be authentic. Interact without prejudice or bias.
2. Inclusion – Make others feel that they belong, whatever the relationship.
3. Safety – Put people at ease physically (feel safe from bodily harm) and psychologically (feel safe from being humiliated).
4. Acknowledgement – Give people your full attention by listening, validating, and responding to their concerns and feelings.
5. Independence – Encourage people to act on their own behalf so that they experience a sense of hope and possibility.
6. Recognition – Validate others for their talents, hard work, thoughtfulness, and help. Be generous with praise and gratitude.
7. Fairness – Treat people justly, with equality, and in an evenhanded way. Treat them without discrimination or injustice.
8. Benefit of the Doubt – Treat people as trustworthy. Start with the premise that others have good motives and integrity.
9. Understanding – Actively listen to what others think to understand them. Let them explain and express their points of view.
10. Accountability – Take responsibility for your actions. Apologize if you hurt someone. Change your hurtful behaviors.

Solve problems by choosing dignity with the following pointers.

1. Be curious, not furious – Approach disagreements with curiosity, using language that invites dialogue.
2. Regulate then debate – When you start to get upset, pause and take a breath before speaking.
3. Listen to understand, not to respond – Really listen to the other person and consider summarizing what you heard.
4. Challenge ideas – Don't attack people. Speak your truth but do it with dignity.
5. Acknowledge knowledge – When someone else makes a logical or interesting point, acknowledge their point.
6. Build up rather than tear down – Explain and build up your idea. Don't attack others' ideas or dehumanize the person.

Programs

LouisianaPTA.org/programs

What Are Programs?

Programs are the good things or events that PTAs do. Is there a need in your school or community that you can fill? PTAs have an opportunity to advocate for children in all kinds of ways, big and small, from the classroom to Capitol Hill, and to create a strong community in the process. These events and activities improve education for all students and help them reach their potential. Programs can be combined with a small fundraiser, a give-away, or a school event to increase attendance. Aim to have at least **three programs for each fundraiser, which is the 3:1 rule.**

National PTA Programs

The programs by National PTA are a great resource for Family Engagement events or student programs, especially for Title I schools. All support documentation is included with how-to videos. There are programs for all ages.

- **Family Reading Experience** supports development of literacy skills and encourages a love of reading. Programs include 1) Book Bingo, 2) Build a Library, 3) Connecting Families with Inclusive Books, 4) Hosting a Visiting Author or Illustrator, 5) Community Book Swap, 6) Community Read, and 7) Virtual Bedtime Story.
- **STEM + Families[®]** delivers hands-on exposure to science, technology, engineering and math to engage families and inspire students to pursue career opportunities in STEM fields. They cover 1) STEM at Home Activities, 2) Science Festivals, 3) Engineering: Propelling Our World, 4) STEM Resources, and 5) About STEM+ Families.
- **PTA Connected** helps children to act safely, responsibly and thoughtfully online. It connects parents with tools, research and support to make the best decisions for their children. They include 1) Be Internet Awesome, 2) Digital Families Community Events, 3) The Smart Talk, and 4) Ready, Tech, Go!, and 5) Build Up and Belong.
- **Healthy Lifestyles** improve the overall health and well-being of families which is a key component to students' abilities to thrive. The three pillars: Healthy Bodies, Healthy Minds, and Healthy Earth. Healthy Bodies includes 1) Family Tasting Nights, 2) Healthy Hydration, 3) PTA Wellness Fairs, and 4) Tobacco Prevention Campaign.
- **Connect for Respect** is an anti-bullying initiative to help create school climates full of safe and supportive peer relationships. One of the most effective ways to prevent bullying behavior is to create a positive school climate where students, families and educators all work collaboratively to build a culture of respect.

Program and Event Ideas

- Used Uniform Sales where everything is \$1 and families donate their old items.
- Donation Closet – school supplies, sanitary products (Grade 2+), deodorant, dental care (donated by dentist)
- Friday Pantry – grab bags of food for students with food insecurity; teachers distribute the food to their students
- Clothes Closet – coats, uniforms, Prom dresses and suits, professional interview outfits
- Family Learning Nights (See NPTA Programs and Grants)
- LAPTA Reflections Arts Program, Reflections Theme Search Contest, Safety Poster Contest
- Read It Again Book Exchange – students bring in books and do a book swap
- Teacher Spirit Cart or Woohoo Wagon of snacks/drinks
- Movie Night – PTA hosts a movie night for the students with snacks, etc.
- PBIS Support – stock the store where kids can turn in their PBIS “bucks” for treats
- S’mores and Hot Cocoa Night
- Back-to-School Car wash
- Grandparents Bingo, Donuts with Grown-Ups, Donuts with Dudes/Dudettes, Pastries with Parents, Breakfast with a Buddy, Ladies Breakfast Club, French Toast with Your Favorites, Pizza with Your Peeps
- Co-host events with feeder schools/PTAs, such as an End-of-Summer Picnic. Share decorating items.
- Talent or Variety Show
- Adopt-a-Student Fairy Godparent – Create a Google doc where parents can sign their kids up who need a Fairy Godparent. Find community donors to give school supplies, clothing, Christmas gift, etc.
- Summer Playground Playdates – schedule weekly playdates at a playground with music, popsicles and water or lemonade for young students and incoming Kindergarteners to get to know each other before school starts

Standing Committee Examples – The Possibilities Are Endless!

Advocacy	Fundraising	Newsletter	Student Involvement
Beautification	Healthy Minds/Lifestyles	Programs	Teacher Appreciation
Communications	Hospitality	Reflections/Arts	Translation
Donation Closet	Inclusion	Room Reps	Used Uniform Sales
Education	Male Engagement	Social Media	Volunteer
Family Engagement	Membership	Spirit Wear/Uniforms	Welcome
Friday Food Pantry	Merchandise	Student Council	

Fundraising

LouisianaPTA.org/funds

Fundraising

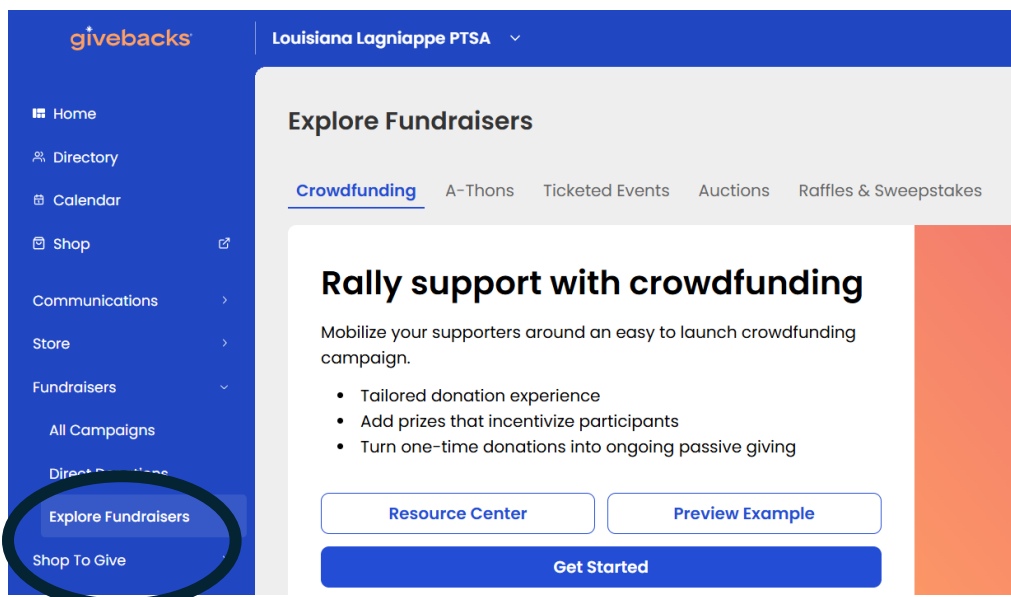
Most PTAs need to raise funds to provide programs and services. However, fundraising efforts should not be the primary emphasis for PTAs. Fundraising should be in response to supporting PTA work. PTAs should engage in **three programs or service projects for each fundraiser activity hosted, 3-to-1 rule**. Evaluate opportunities carefully and consider all legal and community-related implications. When choosing a fundraiser, look at cost and profit margins. Do fundraising events that your community is most likely to support. Consider the dollar amount per purchase that your community will support, such as \$1 or \$100. Consult with your administrators on the number and type of fundraisers with a maximum of two big fundraisers per year. Offer electronic payment options such as Givebacks.com, etc.

Fundraising Ideas

Ask Membership for Donations
Community/Business Sponsorships
Restaurant Nights
Fun Run or Color Run
Readathon
Chocolate/Popcorn/Catalog Sales
Shake/Smoothie Days
Christmas Store
Penny Wars or Coin Challenge
Jewelry Pop Up Shop (Kendra Scott)
[RaiseCraze.com](#) “Kindness Thing”

[RaiseRight.com Gift Cards](#)
Fashion Show & Brunch
Nothing Bundt Cakes, etc.
Parent Perks like reserved parking,
carline cuts, early event entry
Shoe Drive
Givebacks.com
Festivals
Golf Tournament
Gumbo Cook-Off and Car Show
Merchandise and Uniform Sales

Auction Night
Parents’ Night Out
Discount Card for Local Stores
Plant Sale or Bake Sale
Car Wash
Talent Show
Gift Baskets or Big Item Raffle
Concession Stands
Dances or Evening Social/Movie
Birthday Surprise Yard Signs
Calendar Fundraiser (\$ is the Day #)



Membership

Peggy Mauer, LAPTA Membership Chair

Membership@LouisianaPTA.org, LouisianaPTA.org/membership

Make Membership a Priority

Membership stands as the cornerstone of the PTA. Without members, the PTA doesn't exist. Membership is open to anyone who aligns with the National PTA mission and purposes. PTA has three levels in Louisiana: the Local PTA Unit, Louisiana PTA (LAPTA), and National PTA (NPTA). NPTA is the nation's largest (2+ M) and oldest (128 yrs!) nonprofit volunteer organization advocating for children's well-being. Its core mission is to enhance the lives of all children and teens. National PTA provides local PTAs with many resources, programs, training, contests, awards, and grants.

Please make membership a priority! LAPTA sets the annual goal for all PTAs. The goal is listed at Givebacks.com or at LouisianaPTA.org/membership. Members of the Local PTA Unit are also members of LAPTA and National PTA. Each PTA submits to LAPTA \$4.50/member/year. LAPTA then pays \$3.25 to National PTA and retains \$1.25. Membership is valid from the date of issue and expires on June 30 of each year. Use an online purchasing platform such as Givebacks.com.

Monthly Membership Challenges

LAPTA has a goal of 10,500 members. Each challenge is a percentage of the goal set for the Local PTA by LAPTA. The qualifying PTAs will receive a digital badge, certificate, and are entered into a \$100 drawing PLUS other bonus prizes!

- **August “Get Up & Geaux!” Award** – Reach 25% of your LAPTA goal by August 31 and all officers are registered
- **September to Remember Award** – Reach 50% of your LAPTA goal by September 30
- **October Spooktacular BOOst Award** – Reach 75% of your LAPTA goal by October 31 and submit Affiliation
- **January Goal Getter Award** – Reach 100% of your LAPTA goal by January 31
- **February Above and Beyond Award** – Surpass your LAPTA goal by at least one member by February 28

Annual Membership Awards

- **Goal Getter Award** – Reach at least 100% of the LAPTA membership goal
- **Overachiever Award** – Exceed the LAPTA goal by at least 10%
- **Triple Crown Award** – Reach the LAPTA membership goal for at least three consecutive years
- **All Star Staff Award** – 100% membership of teachers and administrators
- **Every Child, One Voice® Award** – Membership total is at least 100% of student enrollment count

Increasing Membership – Grow Your PTA Family

- Start the year with a Welcome Packet including President's welcome note, events, calendar, programs, how the PTA gives back, previous year's accomplishments, fundraising events, membership sign-up form, and Givebacks link.
- KEEP ASKING your families to join PTA at all school events. Clarify that joining does not mean volunteering.
- Provide teachers with a PTA slide for the parent Open House presentations in the classrooms.
- Keep asking teachers to join at all PTA teacher events. Create a membership door hanger for teachers who join.
- Include a Membership Flyer with a QR code to join online with all purchases/deliveries from PTA.
- Use **Talking Points for Teachers App** to text families. Recipients do not need to download the app to receive texts.
- Ask the principal to do a text message to all parents to join PTA including a link to join online.
- Host a grandparent event and ask them to join. Use easy paper forms. Accept multiple forms of payment.
- Sign up for PTA.org Membership Mania emails. Use [Recruitment Tools](#) from NPTA. Many are available in Spanish.
- Use the car line to your advantage by passing out flyers and introducing PTA to the families.
- Have a visible Membership Thermometer or Goal Chart. Find your goal at LouisianaPTA.org/membership.
- Hold membership drawings and giveaways targeting specific groups, such as students, teachers, and families.
- Students can be members! Get prizes donated from local stores or community members.
- Offer benefits such as Free Dress Day, Front-of-the-Line pass, reserved parking spots, etc.
- Share Year-End Summary of all PTA work at the end of the year and Projected Summary at the start of the year.

“125 Ways to Increase Membership” PDF Summary

- **COMMUNICATIONS:** Distribute a Welcome Packet on Day 1. Use both paper sign up forms and online sign up to accept cash, check, and electronic payments. Have PTA social media accounts. Use your custom PTA logo on everything. Have PTA shirts and nametags for the Board. Include membership flyer in deliveries. Show what PTA does and how the money is spent. Translate PTA materials. Have a bulletin board with membership goals, QR code, flyers, newsletters, calendar, etc. Create a Member Tree display and watch it grow.
- **CAMPAIGNS:** Use an annual theme. Encourage members to bring a friend to PTA meetings. Have a Carline Campaign to distribute flyers and meet people. Ask families for feedback and let them know they were heard. Use “Join PTA” yard signs. Offer parent education workshops on homework tips, teen driving, substance abuse, internet safety, or applying for college. Have a campaign that asks men to join. Host a picnic for new families.
- **SCHOOL:** Always have a greeter to welcome everyone at all events. Always have a membership table. Have a membership collection box in the school office. Have General Membership Meetings before well-attended school events. Have JOIN PTA signs throughout the school with membership forms and QR codes.
- **TEACHERS:** Ask teachers to join by putting sign up forms in their mailboxes. Include what PTA did last year and will do this year. Put a poster in the staff lounge. **PTA: Without the “T,” PTA is PAthetic.** Have the principal ask them to join and include an incentive like free dress day. Host a back-to-school luncheon and ask them to join. Thank them personally. Give them a PTA Membership door hanger. Set a staff or teacher goal. Have a teacher rep on the PTA Board. Ask teachers how PTA can help them and then do it.
- **STUDENTS:** Offer student incentives. Have a student membership recruitment table run by students. Use a Text-to-Join Campaign. Create a social media campaign. Set a student membership goal. Create a commercial using the students. Invite Reflections participants to join. Let students have their voice heard.
- **COMMUNITY:** Attend community events and display PTA posters. Ask businesses to join and if you can leave newsletters in their waiting rooms. Create a PTA membership poster for business members to display. Ask school board members, superintendents, politicians, etc. to join. Solicit sponsorships in exchange for publicity. Partner with other local nonprofits. Know the community’s needs and then meet those needs.

Submit Dues at npo.givebacks.com. See LouisianaPTA.org/givebacks.

Log into npo.givebacks.com. Review LouisianaPTA.org/givebacks for details on Givebacks (GB). ***Only the **President** and **Treasurer** are given access to submit dues in GB.*** Email Affiliation@LouisianaPTA.org for help setting up a new account. If your email is associated with more than one PTA, select the correct Local PTA.

1. **If you use GB** to collect dues from your members, on the GB dashboard, select Memberships>Remit State Dues. There is a yellow highlighted bar near the top that will say how much dues is owed to LAPTA. Click the Send ACH Payment button, enter the bank account information, and click Save. The dues will be transferred plus \$2 fee to LAPTA. The bar is blue when no money is owed to LAPTA. The itemized past payments will be listed on the page.
2. **If you do not use GB** to directly collect dues from members, there are 2 ways to import membership info.
 - a. On the GB dashboard on the left side menu, select Memberships>Members. In the upper right corner, select the ●●● 3-dot menu and select Import Members. Download the GB Template spreadsheet. **DO NOT CHANGE** the header labels. The Member Type must **exactly** match those listed under your Membership Products. The default types are Student, Faculty/Staff, Grandparent, Parent/Guardian, Business, and Other. You can add more custom types. Every email must be unique. Student memberships do not require an email. Under Step 2, check the 2 boxes, add your initials, and click *Add CSV* to upload your spreadsheet. To view all memberships, Select Memberships>Members.
 - b. On the GB dashboard on the left side menu, select Memberships>Members. In the upper right corner, select the ●●● 3-dot menu and select *Add Cash/Check Member*. Select the type, enter the other information, and click Save. The membership will now be visible under Memberships>Members. If you cannot select the Membership Type, then you need to make the products visible in your store first. Go to Memberships>Membership Products. Click the ●●● 3-dot menu to the right of each product type and select *Edit Product Visibility* for each item. Check the 2 boxes and save. You can add custom memberships by clicking the blue New Membership Products button in the top right corner.
3. On the GB dashboard on the left side menu, select Memberships>Remit State Dues. There is a yellow highlighted bar near the top that will say how much dues is owed to LAPTA. Click the *Send ACH Payment* button, enter the bank account information, and click Save. The dues will be transferred plus \$2 fee to LAPTA. The yellow bar will now be blue designating that no money is owed to LAPTA, and the itemized payment will be listed on the page. LAPTA will need to enter a *Received By* date to update the payment status to *Received*. This will be done by the 5th day of each month.

Affiliation Report Due October 31

Philip Davis, LAPTA VP of Affiliation
Affiliation@LouisianaPTA.org
LouisianaPTA.org/affiliation

All nonprofits have obligations with the IRS, NPTA, and LAPTA. LAPTA works to keep the local PTA's from losing their nonprofit status. Without the nonprofit status, PTAs would owe income tax to the IRS on all of the PTA's income. To file the Affiliation report, log into the PTA's [npa.Givbacks.com](https://npa.givbacks.com) account. On the left menu, select Compliance>Submit Forms to view the seven forms. Click the blue *Submit Form* button for each form and enter the information.

1. **Membership & Officer Requirements:** Enter the current number of memberships, student population, and teacher and admin total. Confirm that officers are registered on Givebacks and have completed 4 credits of training.
2. **IRS Tax Form 990:** Submit proof of 2023 or 24 filed and accepted IRS Form 990. LAPTA reports to the IRS which PTAs are exempt from federal income tax. See LouisianaPTA.org/treasurer. Filings are due to IRS by November 15.
3. **Bylaws:** Submit the Bylaws file. Bylaws expire every 3 years. Read your Bylaws, especially Termination of Membership, term for officers, Board and General Membership Meeting requirements, and Standing and Special Committees. The template, directions, and sample timeline are at LouisianaPTA.org/bylaws.
4. **Budget Report:** Submit the approved Annual Budget and enter other details. The budget needs to include *Start Up Funds* with amounts listed as an expense and income for a net \$0 effect on the budget.
5. **Audit Report:** Enter the Audit Committee Report findings for each line which is in the Treasurer Toolkit.
6. **LA Secretary of State Annual Filing:** Submit the updated Annual Report from LA Secretary of State (geauxbiz.com) which requires all nonprofits to file annually and pay the \$10 renewal fee (plus a \$5 credit card fee or checks are free). Confirm that the report says you are "In Good Standing." Know when your Annual Report expires.
7. **Insurance:** Submit the insurance declaration page and enter the policy expiration date. LAPTA requires all PTAs to obtain adequate insurance protection from any insurance company, such as Association Insurance Management (AIM) at AIM-companies.com or RV Nuccio at rvnuccio.com.

Retention Phase

If the Affiliation Report is not submitted, then the PTA enters the Retention Phase.

1. **Notification:** LAPTA gives 30 days to submit the missing items and a new deadline.
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 incomplete for three consecutive years, if PTA leadership refuses to implement the Plan of Action, or if the PTA opposes the Purposes and Principles of PTA.

The screenshot shows the Givebacks website interface for Louisiana Lagniappe PTSA. The main content area is titled "Submit Forms" and displays a table of "2025 - 2026 Required Forms". The table has columns for Name, Due Date, and Status. Each row includes a "Submit Form" button. A yellow arrow points to the "Submit Forms" option in the left-hand navigation menu.

Name	Due Date	Status
Membership Dues and Officer Requirements	10/31/25	Submit Form
IRS Form 990 Filing	10/31/25	Submit Form
Bylaws	10/31/25	Submit Form
Budget Report	10/31/25	Submit Form
Audit Report	10/31/25	Submit Form
Secretary of State Annual Filing	10/31/25	Submit Form
Insurance	10/31/25	Submit Form

Contests, Grants, & Awards

Misty Richmond, LAPTA Contests Chair, Contests@LouisianaPTA.org
Jennifer Hale, LAPTA Reflections Chair, Reflections@LouisianaPTA.org

LAPTA Contests (LouisianaPTA.org/contests)

- **Red Ribbon Week Poster Contest** – Louisiana Seymore D’Fair Foundation celebrates the Kiki Red Ribbon Week School Celebration every year from October 23 – 31 with the theme “Don’t Be a Bird Brain! Avoid Drugs!” For the contest, students draw a drug-free poster on white paper. Submit up to 3 winners per Grade Division to LAPTA at LouisianaPTA.org/posters by November 1, 2025. Winners announced November 10.
- **Reflections Arts Program** – This 50+ year old program helps students develop artistic literacy and increase confidence. The different **Art Categories** are Dance Choreography, Film Production, Literature, Music Composition, Photography, and Visual Arts. PTAs decide which categories are available. Each category has specific guidelines that must be followed. The annual theme is “**I Belong.**” Submit three entries per Art Category per Grade Division to LAPTA by January 18, 2026.
- **Reflections Theme Search** – National PTA has students create the theme for Reflections Arts Program in two years. All the PTA does is share the Reflections Theme Search Flyer with their students. LAPTA gets the submissions directly. Five are chosen to advance to National PTA. National PTA gives the final winner \$100! Deadline is November 16, 2025. Winners announced December 1. Entry link at LouisianaPTA.org/theme.

LAPTA Grants (LouisianaPTA.org/grants)

- **\$750 LAPTA Literacy Grants** (4) – for PTAs to host literacy programs at their schools. For possible programs, see PTA.org/Programs. Deadline is November 23, 2025. Winners announced December 1, 2025.
- **\$750 Healthy Minds Grants** (4) – for PTAs to host mental health activities, events, and programs. See programs from National PTA at PTA.org/HealthyMinds. Deadline is March 31, 2026. Winners announced April 14, 2026.
- **\$500 Day of Service Grants** (4) – for PTAs to reach beyond the school and into the community. How can you continue the legacy of PTA? Deadline is March 31, 2026. Winners announced April 14, 2026.
- **\$500 Creative Teacher Grants** (4) – for classroom teachers to fund creative, innovative, and fun programs or projects for students. Deadline is March 31, 2026. Winners announced April 14, 2026.

National PTA Grants (pta.org/Grants) offers many grants to supplement PTAs hosting events and programs. Application is very easy, opening on August 20 and closing quickly. See their award applications, especially the School of Excellence Award (LouisianaPTA.org/programs) which closes on October 15.

LAPTA Awards (LouisianaPTA.org/awards) Due March 31

1. **Joseph F. Seeley Volunteer of the Year Award** (1) – PLEASE recognize and thank that special person.
2. **Advocacy Award for PTA Unit** (2) recognizes PTA advocacy efforts. Every PTA advocates!
3. **Advocacy Award for Students** (2) recognizes a student’s advocacy efforts.
4. **Membership Awards** (LouisianaPTA.org/membership) – Monthly Membership Challenges and Annual Awards

Summary of Dates for Contests, Grants, and Awards

November 1, 2025	Red Ribbon Week Safety Posters due
November 10, 2025	Red Ribbon Week Safety Poster Winners announced
November 16, 2025	Reflections Theme entries due
November 23, 2025	Literacy Grant application deadline
December 1, 2025	Reflections Theme Winners and Literacy Grant Winners announced
January 18, 2026	Reflections Arts Program entries due
March 2, 2026	Reflections Arts Program Winners announced
March 31, 2026	Healthy Minds Grant, Day of Service Grant, Creative Teacher Grant, Volunteer of the Year Award, and Advocacy Award applications deadline
April 14, 2026	Healthy Minds Grant, Day of Service Grant, Creative Teacher Grant, Volunteer of the Year Award, Advocacy Award, and Annual Membership Award winners announced

Reflections Arts Program

Jennifer Hale, LAPTA Reflections Chair

Reflections@LouisianaPTA.org

LouisianaPTA.org/reflections, LouisianaPTA.org/students

Reflections Arts Program by National PTA

The Reflections Program provides opportunities for access to the arts, which boosts student confidence and success in the arts and in life. This 50+ year old program helps students explore their thoughts, feelings, and ideas, develop artistic literacy, increase confidence, and find a love for learning. This really is a fun PTA activity to offer to your students! Caddo can encourage its students to enter this AND the big local competitions. If you do not offer Reflections, students may participate with Lagniappe PTSA with \$5 dues (LagniappePTSA.org).

- **Art Categories:** 1) Dance Choreography, 2) Film Production, 3) Literature, 4) Music Composition, 5) Photography, and 6) Visual Arts. PTAs decide which categories they will offer. Each category has specific guidelines and rules.
- **Grade Divisions:** Primary (Pre-K–Grade 2), Intermediate (Grades 3–5), Middle School (Grades 6–8), and High School (Grades 9–12), plus two **Accessible Arts Divisions** for students with 504/ADA/IDEA: Elementary Accessible Arts (Pre-K - Gr 5) or Secondary Accessible Arts (Gr 6 – 12). Every PTA has at least 2 Grade Divisions.
- **The annual theme** is “I Belong.” All entries are created with this theme in mind.

How to Host Reflections

1. **Register** with LAPTA at LouisianaPTA.org/reflections.
2. **Training:** Watch the LAPTA training videos posted online and participate in the LAPTA Zoom Meetings.
3. **Customize** the Reflections Flyer with your art categories, contact information, and deadline.
4. **Promote:** Share the program with all families and teachers, especially the gifted, music, art, special ed, and literature teachers. Give them early notice if they would like to incorporate it into their curriculum. Recruit other volunteers to help organize the program. Students will need access to the Student Entry Form, Guidelines for the art categories, and the Media/Press Release for St. Tammany students. Complete the top portion of the Student Entry Form before distributing it. You can share downloads for students at LouisianaPTA.org/students.
5. **Receive Entries:** You decide how students submit their work to the PTA. Students can enter multiple categories. You can use Google Forms for electronic submissions and share LouisianaPTA.org/students to download forms.
6. **Judging:** The deadline to submit your winners to LAPTA is January 18, 2026. Set your deadline several weeks earlier to give ample time for judging. Start looking for judges now. They should have experience with their art category. All judging is done blind and should not be done by PTA parents. The judge’s rubric and score card is a fillable PDF form or use Google Forms. You can decide how many winners you have, but only three per Art Category per Grade Division may advance to LAPTA.
7. **Portal:** The PTA may advance 3 winners per Art Category per Grade Division to LAPTA by January 18, 2026 through the online portal. The art entry and Student Entry Form are submitted electronically for each student. A PTA may enter in every Grade Division that its school includes, plus the Accessible Arts Division(s).
8. **LAPTA Winners:** LAPTA announces its winners on March 2, 2026. The LAPTA 1st Place National Entry Winners advance to National PTA competition who announces their winners on May 1, 2026. All LAPTA student winners receive an engraved medal, certificate, and a gift!

Reflections Theme Search

Students contribute ideas for the next Reflections Program Theme in two years. The PTA simply distributes the Reflections Theme Search Flyer to students either by paper or digitally. LAPTA receives submissions directly and selects up to five to advance to National PTA contest. Deadline is November 16, 2025. The LAPTA announces its winners who advance to the National PTA contest on December 1. The final National PTA winner receives \$100 from National PTA!



The flyer features the National PTA logo and the word 'REFLECTIONS' in large, bold, red letters. Below this, it says 'CALL FOR NEW THEME!' in blue. The main text reads: 'The new theme is needed for 2027-2028! Help us pick the theme idea that will spark fun and creativity for the National PTA Reflections Program. Deadline: November 16, 2025'. To the right, there are icons for Dance, Film, Literature, Music, Photography, and Visual Arts. Below these icons, it says 'Enter your idea at LouisianaPTA.org/theme or scan me!' with a QR code.

Advocacy

Naomi Narcisse, Advocacy & Federal Legislative Chair
Advocacy@LouisianaPTA.org, LouisianaPTA.org/advocate

What Is Advocacy?

PTA Advocacy is speaking up for children in schools, communities, government bodies, and other organizations that make decisions that affect children. Advocacy is working to make things better; speaking to someone in power to fill a need; raising funds to support needs; talking to a teacher about a problem and forming a solution; and simply, working to achieve a change. LAPTA does advocacy work at the federal level and state levels. While National PTA determines the resolutions and stances at the federal level, LAPTA decides what issues to support at the state level.

When dealing with a local issue and before taking a big action, poll your membership to find out where they stand on issues to correctly speak for the voice of membership. The LAPTA Advocacy Toolkit contains details on how to best advocate. It explains how to strategically attack an issue, recruit supporters, build coalitions of like-minded groups, structure the arguments, and communicate effectively.

National PTA Legislative Conference (LegCon)

National PTA's annual public policy agenda guides the federal advocacy work. Local PTAs may not contradict National PTA resolutions or position statements. See pta.org/home/advocacy/federal-legislation/Key-legislation. The Annual National PTA **Legislative Conference** (LegCon) is held in Washington, D.C. PTA Leaders meet with their state's congressional delegation to promote certain "Asks" by NPTA. The 2024 Asks were to promote digital safety of children and youth online; strengthen Family-School Partnerships and invest in meaningful family engagement; fully fund essential programs supporting children, families, and schools; and support children impacted by trauma, substance use, and mental health challenges. The goal is to influence how congressional delegates vote on bills and resolutions. LAPTA will attend the next LegCon on March 2–4, 2026.

Mission Partners (LouisianaPTA.org/missionpartners)

Mission Partners are nonprofits or other groups that join forces with LAPTA to support our overlapping missions. Their main focus usually is to somehow improve the lives of children. The types of groups are endless but might include a teachers or librarian group, foster care state entity, a mental health group, and so many more. LAPTA is always looking for more Mission Partners! Our current Mission Partners are The Kids Mental Health Foundation, Seymore D'Fair Education Foundation and Prevention Coalition, Voter Voice, Children & Youth Prevention Coalition of St. Tammany, and Louisiana Partnerships for Children & Families.

Healthy Minds & Healthy Lifestyles

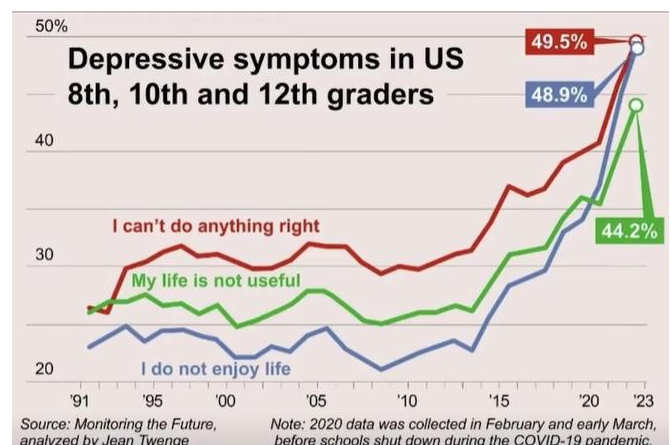
OPEN, LAPTA Healthy Minds Champion

HealthyMinds@LouisianaPTA.org, LouisianaPTA.org/healthyminds

Facebook – Search "Louisiana PTA Healthy Minds"

Mental Health Statistics

- Rates of major depression is increasing in the US youth: 1 in 5 children struggle with mental health challenges.
- Over 60% of youth with major depression do not receive any mental health treatment.
- Louisiana is ranked 48th in the US with 16.6% of youth ages 12-17 experiencing at least one major depressive episode in the last year according to the Mental Health in America Report in 2023.



Healthy Minds Program (PTA.org/HealthyMinds)

National PTA developed the Healthy Lifestyles Program which includes 1) Healthy Bodies, 2) Healthy Minds, and 3) Healthy Earth. The PTA can help families understand that children must be physically, mentally, and emotionally healthy to thrive. Connect what happens in families' homes to what happens within the school building. PTA can support school leadership with school-based mental health support by teaching positive social and emotional skills to students. Be sure to include diversity, equity, and inclusion considerations with all mental health efforts.

- **Listen** – Learn the mental health needs of your community and identify gaps in existing services and supports.
- **Partner** – Form a Healthy Minds Team. Discuss how PTA can enhance school-based mental health support.
- **Share** – Promote and distribute National PTA's Healthy Minds family tools and resources.
- **Build** – Host a "PTA Healthy Minds Sessions" to allow families to learn together and discuss important topics.

Visit [PTA.org/HealthyMinds](https://www.pta.org/HealthyMinds). Scroll down to Healthy Minds Resources and click on "**For PTA Leaders.**" Host in-person or at home events that can be in real time or self-paced. Current sessions include PTA Healthy Minds 101, Building SEL Skills at Home, and Building Resilience. See LouisianaPTA.org/grants for LAPTA Healthy Minds Grant and PTA.org/grants for National PTA grants.

Resources at PTA.org/healthyminds for Families and PTA Leaders

Follow the hyperlinks available in the PDF file at LouisianaPTA.org/training or LouisianaPTA.org/healthyminds.

- [Healthy Minds Overview](#)
- [Family Discussion Guide](#)
- [Grief & Loss](#)
- [What Your Family Can Do to Build Healthy Minds](#)
- [Building Healthy Minds](#)
- [Building Resilience](#)
- [How to Get Help to Build Healthy Minds](#)
- [Anxiety](#)
- [Social Emotional and Service Learning](#)
- [Depression](#)
- [Loneliness & Isolation](#)
- [Family Action Plan](#)

SPED Student Support

Tara Kennedy, LAPTA Special Education Chair
SPED@LouisianaPTA.org, LouisianaPTA.org/sped

Special Education and Special Populations

Some students face unique challenges and benefit from additional support and consideration in school settings. These students may have disabilities, sensory sensitivities, language barriers, economic hardship, unstable housing, or be in foster care. The goal is to create an inclusive environment where all students can thrive through thoughtful accommodations and support. Simple adjustments can make a big difference, helping more families feel welcome and engaged. Providing accessibility and inclusion doesn't take anything away from others. Families navigating special education often seek meaningful connections and want to be involved and contribute. Supporting students with special needs aligns perfectly with the PTA's mission. Parents with experience in the IEP process can be valuable resources for those just starting the journey. PTA offers a welcoming space for families, especially those who may feel isolated, and fosters connection, support, and understanding. Please reach out. It can make all the difference.

Make Changes & Take Action

- Modify Events to make all PTA events inclusive, such as providing sunglasses for light sensitivities.
- Organize an Awareness Day. Students wear a certain color to show support. Have activities to teach sensitivity.
- Host a fundraiser to purchase items for sensory room or universally designed equipment.
- Have a SPED Committee to offer accommodation suggestions and build an inclusive community.
- Have a Buddy Bench to support friendship needs.

President and VP

Beth Maillho, LAPTA President, (985) 778-5799

President@LouisianaPTA.org

LouisianaPTA.org/president

Sign Ups & Downloads

Register at LouisianaPTA.org/register. Download the current toolkits at LouisianaPTA.org/toolkits. Create an account at PTA.org which has lots of information, programs, grants, and e-learning (Thrive.PTA.org). Affiliation Report is due October 31. See LouisianaPTA.org/affiliation. Get a binder to organize your files. Online file sharing is a bonus.

PTA Basics

All officers must be members of their Local PTA Units, which includes membership in LAPTA and NPTA. The Board of Directors consists of the Executive Committee (elected officers), principal, committee chairs, and other positions like Parliamentarian and Historian. EIN is your Employee Identification Number issued by the IRS. LUR is your Local Unit Registration Number issued by National PTA. You must adhere to your Bylaws and keep them up to date. See LouisianaPTA.org/bylaws. The PTA's money must be separate from the school, and used to support the mission and goals of PTA. Use the filter, "What's best for the children?" Most school boards do not allow their employees to handle PTA money. Use **Talking Points for Teachers App** to text families and for automatic translation services. Recipients do not need to download the app.

President's Role

The President is the PTA's leader, manager, mediator, team member, role model, facilitator, and advocate. VPs' role is to support the President with any other duties set by the PTA which frequently includes membership. Be an effective leader by involving others, building consensus, fostering cooperation, showing respect, appreciating volunteers, delegating to others, asking for help, and seeking future leaders. Schedule the monthly Board of Directors Meetings and the General Membership Meetings well in advance. Read your Bylaws to see when meetings are to be held and to know the meeting quorums in Articles VIII and X. Pick programs and fundraisers that have the support of the Board.

Build a Relationship with the Principal

Principals want the PTA's work to be aligned with the school's goals which benefit the students and school. Meet with them frequently. Communicate often. Always respect the relationship with the principal as they provide the forum for PTAs to operate. Know what they want from you before acting. They do not control PTA funds and cannot sign PTA checks. The budget as approved by the General Membership declares where the money will go. The principal is a Board Member who has one vote on the Board. They do not dictate how the PTA spends its money and cannot receive PTA funds for unspecified purposes.

Financial Basics for Nonprofits

- The annual budget must be approved at a General Membership Meeting.
- Use an online accounting system to track finances every year, such as MoneyMinder or Wave Apps.
- Document all expenses with an Expense Form with a receipt and kept in the Treasurer's digital or physical binder.
- All checks require two signatures. Debit card purchases need two signatures on the Expense Form (not allowed in Caddo).
- Blank checks and checks payable to cash are not allowed unless you are getting petty cash at the bank.
- Reconcile bank accounts monthly. Review and signed bank statements by a nonauthorized person.
- Have a Budget Report at all meetings. See the Treasurer's Toolkit to understand all policies and procedures.

Promote Your PTA

Use the PTA logo on everything. Give credit to your PTA for hosting programs. Spell out Parent Teacher Association sometimes, especially for PTSAs. Make it easy for people to join PTA. Offer online purchasing on Givebacks.com or another platform. Communicate consistently and intentionally with your families and use social media wisely. Welcome everyone. Always be looking for the next leaders and ask people to join. Send thank you notes and recognize volunteers publicly.

Hold Effective Meetings (LouisianaPTA.org/meetings)

Use Roberts Rules of Order at RobertsRules.org. See robertsrules.com/frequently-asked-questions. Always have an agenda and current financial reports. Know your quorum. Start and end on time. Keep meetings as short as possible with long discussions occurring outside of the meeting. Add icebreakers to help people get acquainted. Hold General Membership Meetings before or during highly attended school events or in conjunction with a PTA program.

- In Board Meetings of about 12 or fewer attendees and in committee meetings, the President may make motions, vote, and debate. If the meeting has more than 12 people, the chair needs to be impartial and may not make motions, debate, or vote (except with a ballot vote or if their vote will affect the result.)
- Use **Unanimous Consent** to reduce the time needed to pass a motion if a matter is minor or opposition is unlikely. “By unanimous consent, I’d like to make a motion that [details]. Do I have a second? Is there any objection?” If all members remain silent, the chair says, “Hearing none, the motion passed by Unanimous Consent.” If a member disagrees, they say, “Objection.” The chair then allows for discussion and takes a vote in the usual way.
- Only members may participate in making motions, engaging in debates, and voting. Let attendees know the rules.
- If discussions become contentious, establish debate guidelines. Maintain your composure. Do not respond by shouting.
- If there are whispers, remain silent to regain the audience’s attention.
- If confronted with challenges to integrity, avoid defensiveness. Maintain a good sense of humor.

Common Challenges and Their Remedies

- **Communication:** Communication is key. Using Talking Points for Teachers App for mass texts. At the first BOD meeting of the year, lay the foundation for a fun, happy PTA by saying, “If you feel excluded or get your feelings hurt, there is probably a misunderstanding somewhere. Everyone is always included. Please give the others the benefit of the doubt if your feelings are ever hurt. Talk to them about it. You can trust my motives that we are on the same team.” Communicate directly and often with your principal, Board, and families. See more details under *Successful Leadership*.
- **Finding Volunteers:** Ask teachers which parents are helpful. Have a grandparent event and ask them to join PTA and to volunteer. Form relationships with parents. Talk to people at the school events and let people know you can’t do it alone. Give people options on how and when they can help. Acknowledge and thank every volunteer! Get the community involved. Share the school’s policy on volunteering – where, when, and how.
- **Increasing Membership:** Ask, ask, ask; you’ve got to ask more than once; share all that the PTA did the previous year and what PTA will do this year IF you have their support. Compare the cost of membership to a coffee or two. Can they offer up a coffee for the benefit of all the students? Louisiana Lagniappe PTSA uses the phrase “Join for less than the cost of beignets with café au lait!” Ask like-minded groups in the community. PTAs can pay dues for people, such as offering to pay dues if someone volunteers at an event.
- **Affiliation:** Use Givebacks.com to upload files. Don’t wait until the last minute. Ask LAPTA for help. Have others assist.
- **Burnout:** Pace yourself. Family comes first. Take Sundays off. Keep it fun. Many of us are givers and people-pleasers to our own detriment. Know when to step back. Take care of yourself. Your PTA work needs to be supported by the Board.
- **Difficult People:** Set boundaries. Don’t give them power over your happiness. Don’t pick up what they’re putting down. Be direct and brief when communicating. Use the new Termination of Membership for truly difficult people and know that it might lead to lawsuits. Consult your insurance company for proper coverage.

Fostering the Culture of PTA

Make school fun and engaging for everyone with some of the following ideas. Get create and have fun!

- Celebrate the joys of learning with a fun Popsicle Day using the cheap kind of popsicles.
- Include students by inviting them to attend PTA meetings. Give them a voice in activities and decision making.
- Welcome all parents by asking them to come as they are to join the PTA in building a stronger school community.
- Share all school events and assist parents with staying in the loop by using social media wisely.
- Support school groups by offering mini grants to fund their club or organization. Empower their creativity and leadership!
- Include the following on all flyers, emails or social media posts:
 - 🗨 Join the Movement! Be part of a PTA that’s fun, inclusive, and student-centered.
 - ✉ Contact: [Email and Phone]
 - 🔗 Follow Us: [Social Media info, Website]

Treasurer – Money Talks

Amy Brunet, LAPTA Treasurer

Treasurer@LouisianaPTA.org, LouisianaPTA.org/treasurer

Visit LouisianaPTA.org/treasurer. Register at LouisianaPTA.org/register. Download **LAPTA Toolkit: Treasurer**. Create an account at PTA.org. Get a binder to organize your files which can be digital. Online file sharing is a bonus.

All money must be authorized, documented, tracked, and verified.

- **Authorization** comes from the General Membership’s approval of the annual budget at the first meeting of the year.
- **Documentation** involves receipts for expenses and deposits organized in a digital or physical binder.
- **Tracking** is through a ledger or accounting software that can generate reports such as MoneyMinder.com, free Wave Apps, or QuickBooks.
- **Verification** is through the annual IRS tax filing, Audit Report, and the Active Affiliation Report to LAPTA.

Getting Started

Update bank signers to have at least three authorized signers. You cannot sign a check payable to yourself. All checks need two signatures. The school principal can be authorized on the account, but they cannot sign checks. Transfer all Givebacks or CheddarUp accounts to a current officer each year which requires their personal information (SSN). **Order debit cards** for the bank signers (not allowed in Caddo) by authorizing this in the minutes from a BOD meeting. The PTA name and the person’s name both need to be on the debit card. **Chair the Budget Committee** and create the budget. Present the budget at the first General Membership Meeting. A motion needs to be made to accept the proposed budget and authorize spending. **Assist the Audit Committee** (they cannot be authorized bank signers) with any questions as they conduct the Audit Report on the previous year.

Monthly Duties: Use an on-line accounting software and track income and expenses. Attend all PTA meetings and present the Budget Report and monthly Reconciliation Report. Review all Expense and Deposit Forms for the month to get any missing information or receipts ASAP. Have monthly bank statement reviewed and signed by a non-signer. Submit dues of \$4.50 per person per year to LAPTA at LouisianaPTA.org/membership. PTAs may offer to pay membership dues for people.

Treasurer’s Binder (This can be digital. See fillable PDF forms online.)

- Accounts, debit cards, & passwords summary sheet; Board roster
- Expense Forms and receipts
- Deposit Forms and receipts (Mobile deposits are acceptable.)
- Monthly bank statements and reconciliation reports
- Annual budget, budget reports, agendas, and minutes
- Charter info: IRS tax filings, Bylaws, Standing Rules, LAPTA Toolkit, Articles of Incorporation Annual Report, Audit Reports, insurance policy, etc.

Financial Management Principles

- Only and all PTA money may be deposited directly into the PTA’s bank account.
- There is no authorization to spend money until there is an approved budget, except for the previous budget’s “Start-Up Funds.” This line item has the amount as expense and deposit for a net \$0 on the budget.
- Never sign a blank check or make a check out to “cash” unless you need to get petty cash from the bank.
- Always have two people sign every expense.
- Never pay with cash. If you receive a cash payment, issue a cash receipt.
- Insurance for the PTA is required, especially for those who handle money.
- Demand receipts within 1 week of any PTA payments. Do not wait to gather receipts.

Budget

The budget estimates the PTA's expenses and deposits for the fiscal year which is July 1 through June 30. Fundraising is used to support the programs and services of the PTA. Only raise what is needed. The Budget Committee, chaired by the Treasurer, creates the budget. It includes line items for each category or event with amounts for income, expense, and net total. It is better to overestimate income because potential spending is authorized. The budget must include **Start Up Funds**, which is simply a placeholder for the amount a PTA may spend before approval of the annual budget. Individualize hospitality events, such as Staff Welcome Luncheon, Christmas Luncheon, and Teacher Appreciation Week Luncheon. The Comparison Budget Report is the monthly report that compares the actual amounts to the budget amounts with the net total and is provided at all PTA meetings so that the PTA does not exceed the budget. Budgets may be amended if approved by the General Membership.

Banking & E-Commerce Policy (The full policy is in the Treasurer's Toolkit.)

- All PTAs must have their own checking account under their EIN (Employee Identification Number) with at least three authorized signers. Savings accounts are allowed.
- Debit cards are allowed for authorized signers only (not in Caddo). Two signatures are required on the Expense Form. Credit cards are **not** allowed. Recurring bills may be autopaid with a debit card.
- Online and point of sale payment collection systems are allowed.
- Venmo and Zelle are **not** allowed. They leave the PTA vulnerable to fraud. PayPal is technically allowed, but there are better alternatives like Stripe on Givebacks.com, CheddarUp.com, PTBoard.com, or SquareUp.com.
- All expenses require a completed Expense Form. All deposits need a completed Deposit Form.
- Deposits are counted by two people and should be made promptly.
- Checks may be deposited electronically. Note confirmation number and date. Destroy the check after it clears.
- Transfer money from online accounts at least monthly.
- Mail bank statements to the PTA's permanent address, which is the school's address. Paperless or electronic bank statements are allowed. Have a non-bank signer review and sign every bank statement.
- Follow up with all NSF checks for repayment plus bank fees.

MoneyMinder.com, WaveApps.com, Givebacks, CheddarUp, or PTBoard

LAPTA encourages the use of online platforms to collect membership dues and to track finances. Givebacks.com works as an online store and a simple website. There is no monthly fee but there are payment fees that can be paid by the buyer. LAPTA requires PTAs to use Givebacks to submit dues to LAPTA and to submit the affiliation report. LAPTA recommends PTAs use it as a store and to directly collect dues. MoneyMinder.com (\$299/year) is accounting software for non-profits. It tracks expenses and deposits, has easy budget set-up, runs reports, and maintains history over the years. Wave Apps is a free alternative to MoneyMinder.

Federal & State Taxes

Federal tax filing is due 4 ½ months after the fiscal year ends, which is November 15. Nonprofits file a Form 990 with IRS. Form 990-N is for gross income less than \$50,000. Form 990-EZ is for gross income \$50,000 - \$200,000. Form 990 is for gross income over \$200,000. When calculating gross income, EXCLUDE member dues paid to LAPTA. For example, if you had \$1200 total membership dues income and paid \$540 to LAPTA for 120 members, you would net \$640 and would only report \$640 to the IRS for dues. All money given to the PTA is a tax-deductible donation. Include "Thank you for your tax-deductible donation." PTAs pay sales tax on all purchases. (Schools do not pay sales tax.)

Year-End Duties

- Have the Passwords & Accounts Summary Sheet accurate and up to date.
- All Expense & Deposit Forms are documented, complete, and entered into ledger and binder.
- Have all bank statements, monthly reconciliation reports, budget reports, agendas, minutes, and annual budget.
- Include previous Audit Report, EIN, Articles of Incorporation, IRS tax filings, and insurance policy.
- Review records retention policy and keep required documents.
- Meet with the incoming Treasurer and President. Turn over check book, debit cards, binder, past records, etc.
- Transfer any accounts to the incoming officers, such as Givebacks and CheddarUp, which need a SSN.

Secretary – Let’s Take a Minute

Jessica Resendiz, LAPTA Secretary
Secretary@LouisianaPTA.org, LouisianaPTA.org/secretary

Where to Start

Register at LouisianaPTA.org/register. Visit LouisianaPTA.org/secretary. Download **LAPTA Toolkit: Secretary**.

The Secretary is a member of the Executive Committee & the Board of Directors. The Secretary’s basic duties are outlined in the PTA’s Bylaws and further explained in the LAPTA Toolkit: Secretary. The duties include attending and recording the minutes for all meetings; distributing meeting minutes to the members that correlate to the meeting type; creating the agenda for all meetings if requested by the President; having records from previous meetings ready for review; organizing and storing all records in either digital or paper format; and maintaining the membership roster.

When taking the minutes, follow the format of the agenda. It can be in outline or narrative format. Take handwritten notes in a bound journal with numbered pages -or- type the minutes during the meeting. If there is a discussion over an issue, only record what the final decision is. Always record in 3rd person. Ask for clarification during the meeting if you miss something. View a recorded LAPTA Board of Directors Meeting at LouisianaPTA.org/secretary to practice.

Terms

- **Bylaws** are the governing rules of the PTA. The Local PTA Unit Bylaws Template is at LouisianaPTA.org/bylaws. They expire every 3 years with the expiration date on page one. Email bylaws@LouisianaPTA.org for a copy.
- **Quorum** is the minimum number of members necessary for a PTA to conduct business. The quorum for the Executive Committee (elected officers) and Board of Directors Meetings is a majority of its members. The quorum for General Membership Meetings is listed in Article X, Section 2 of the Bylaws.
- **Board of Directors** is the main governing body of the PTA. It consists of the elected officers (Executive Committee) & Committee Chairs (or heads) which are listed in the Bylaws and (potential) Standing Rules.
- **Parliamentary Procedure** is a set of rules for conducting orderly and fair meetings. PTAs use the book Robert’s Rules of Order, Newly Revised which details parliamentary procedure, or [robertsrules.com](https://www.robertsrules.com). Look at the [FAQs](#).
- **Minutes** are the official record of all meetings, are kept forever, and become the PTA’s history. They’re available for all PTA members. It is the record of what was done and not everything that was said. Personal opinions & discussions are not recorded. They are written efficiently and concisely and should be typed.
- **Motions** are statements that describe a proposed action or decision that is made by the PTA.

Contents of the Minutes

The minutes generally follow the layout of the agenda. Here is a brief, typical overview.

- **Heading:** Include the meeting type (Executive Comm, Board, or General Membership), PTA name, date, and location.
- **Call to Order:** The meeting was called to order by [name] at [time].
- **Opening (Optional):** Note what was done and by whom.
- **Attendance:** List attendee names or attach sign-in sheet. State if a quorum was or was not established.
- **Secretary’s Report:** “Minutes from previous meeting were [read/distributed/emailed] and [approved or approved as corrected]” or “The reading of the minutes was waived and approved as distributed.”
- **Treasurer’s Report:** The XYZ Bank Account has \$99,999. CheddarUp.com has \$209. *(You can round to whole dollars.)*
- **President’s Report:** details
- **Principal’s Report:** details
- **Committee Reports:** details for each committee
- **Old Business** (optional): details
- **New Business** (optional): details
- **Announcements:** details
- **Adjournment:** Note the time the meeting ended.

Draft Minutes vs. Approved Minutes

- The minutes should be typed within 5 days of the meeting. Number the pages. Include all reports. Have the President preview the minutes. These are called the “**Draft Minutes**.”
- At the next meeting, the Secretary distributes and/or reads the Draft Minutes. (The reading of the minutes may be waived by a majority vote without debate.) The Secretary asks for any corrections which are made in red ink by drawing a line through the error with the correction written above or in the margin. Minutes may be corrected whenever the error is noticed regardless of the time that has lapsed. To correct minutes after they have been approved requires a 2/3 affirmative vote. The Secretary then states that the minutes are “approved as read” or are “approved as corrected,” and signs the minutes. A motion is not needed to approve the minutes. The secretary signs their name & dates the minutes in both the draft & approved minutes. The minutes then become the official **Approved Minutes**.

Recording a Motion

The process of making motions ensures that all decisions are fairly discussed & voted on. Record the name of the person who made the motion, whether it was seconded, the exact motion verbatim, how the vote was taken (verbal or ballot), and if the motion passed or failed. If a motion is withdrawn, it is as though it never happened and is not included in the minutes. If a motion is not seconded, then it cannot continue to be discussed and it dies. Only record the final version of a motion. There is a Motion Form in the Secretary Toolkit. Use this format including the indentation, bold text, and skipping a line before and after the motion:

A MOTION WAS MADE by Clotile Boudreaux and seconded to waive the reading of the minutes by unanimous decision. There were no objections. **MOTION PASSED.**

A MOTION WAS MADE by Mignon Bergeron and seconded to host a Read-It-Again Library event by the ABC PTA. A verbal vote was taken. **MOTION PASSED.**

A MOTION WAS MADE by Evangeline Hebert and seconded to purchase a vehicle for the principal. The ballot vote was taken with 1 yes and 12 nos. **MOTION FAILED.**

A MOTION WAS MADE by Octavia Dubois and seconded to create the Nominating Committee with Person 1, Person 2, and Person 3. A verbal vote was taken. **MOTION PASSED.**

A MOTION WAS MADE by Chantelle Champagne and seconded to have Massage Envy provide free massages during Teacher Appreciation Week using unanimous consent. There were no objections. **MOTION PASSED.**

A MOTION WAS MADE by Etienne Theriot to accept the proposed annual budget from the Budget Committee. A verbal vote was taken. **MOTION PASSED.** *(A second is not needed if a motion is coming from a committee.)*

A MOTION WAS MADE by Magnolia Chiasson and seconded to adjourn the meeting early before all items on the agenda were covered. A verbal vote was taken. **MOTION FAILED.** *(The only time a motion is needed to adjourn a meeting early is if all items on the agenda are not covered.)*



Louisiana PTA Annual General Membership Meeting Agenda

Caddo Magnet High School

August 23, 2025

- **Call to Order and Mission Statement:** Beth Maillho, LAPTA President
- **Credentials and Attendance Report:** Jennifer Hale, LAPTA VP of Leadership Development; Quorum
- **Treasurer's Report** by Ashley Snell, LAPTA Treasurer
- **VP of Affiliation Report** by Philip Davis, LAPTA VP of Affiliation
- **Membership Report** by Peggy Mauer, LAPTA Membership Chair
- **President's Report** by Beth Maillho, LAPTA President; Motion for 1-yr terms
- **Committee Reports**
- **Next Annual General Membership Meeting:** August 15, 2026 in Mandeville at PTA Leadership Training
- **Adjournment**

Louisiana PTA Annual General Membership Meeting Minutes

Fontainebleau High in Mandeville

August 17, 2024

- **Call to Order** at 12:08 pm by Beth Maillho. The PTA Mission Statement was read aloud.
- **Attendance:** There were 76 members in attendance. A quorum was present.
- **Secretary Report:** Amanda Brady was appointed as the *Secretary pro tem* by Beth Maillho. The minutes from the last meeting were previously approved by the Minutes Committee.
- **Affiliation Report** presented by Philip Davis: 2023 Affiliation Totals: 51 PTAs were 100% affiliated, 6 PTAs were more than 50%, 19 PTAs were less than 50% affiliated.
- **Membership Report** presented by Peggy Mauer: 10,664 members in 2023; The 2024 goal is 10,500 members.
- **Treasurer's Report** presented by Ashley Snell: \$5,924 in Hancock Whitney, \$4,609 in CheddarUp, \$161, 059 in Raymond James Investment account.
- **President's Report** presented by Beth Maillho: The Annual LAPTA Meeting will be in August alternating each year between the north and south Training Days. The next annual meeting will be held on August 23, 2025 in Shreveport, LA. Philip Davis was elected as the new VP of Affiliation. Awards for LAPTA contests will be delivered to students in April or May at their schools rather than at one big annual event.

A MOTION WAS MADE by Philip Davis and seconded to create the Minutes Committee and appoint Rosa Toliver, Shannon Ledoux, and Tonya Deville as committee members to approve the minutes prior to the next annual meeting. A verbal vote was taken. **MOTION PASSED.**

- **Adjournment** – Meeting adjourned at 12:14pm by Beth Maillho.

Proposed LAPTA Bylaws Amendments Overview

Current	Proposed
<p>1 Section 1. Officers. The officers of the LAPTA shall be one President, one Vice-President of Affiliation, one Treasurer, and one or two Secretaries.</p>	
<p>2 Section 2. Election Groups. Officers shall be elected at a General Membership Meeting in April or May. Elections are divided into two groups. Group One, elected in odd years, is the Treasurer and the Secretary. Group Two, elected in even years, is the President and the Vice-President of Affiliation.</p>	<p>Section 2. Elections. Officers shall be elected in April or May. The Nominating Committee (see Article IX) shall publish its slate 20 days before elections. Nominees from the floor shall submit their intent to run to the President at least 15 days before elections. The final list of all nominees shall be published four days before elections. Contested positions with more than one candidate shall be elected by a ballot vote at a General Membership Meeting. Uncontested positions with only one candidate shall be considered elected by unanimous consent acclamation at a Board of Directors Meeting.</p>
<p>3 Article VIII. Section 1. Composition and Eligibility. The Board of Directors (BOD) Members shall be the Executive Committee and the Standing Committee Chairs. Each BOD member shall be a member of a Local PTA Unit in Louisiana, serve in no more than two capacities, and may not serve on the BOD while employed by or under contract to LAPTA unless approved by the BOD. BOD Members serve on a voluntary basis and are not eligible to receive compensation for their services.</p>	
<p>4 Article IX. Section 3. Point 1. Nominating Committee of three members and two alternates from the General Membership is appointed by the BOD for contested elections. No candidate running for LAPTA office may serve on the committee. The committee appoints its chair and has charge of elections. For a contested position, the vote is by ballot. A majority vote constitutes an election. For an uncontested position, the President may declare the nominee elected.</p>	<p>The Nominating Committee of three members from the General Membership is appointed by the BOD who selects the chair. It notifies Local Units of open offices, solicits recommendations, and selects one nominee for each position. The report is sent to the President and Secretary 20 days before elections and publicized to the Local PTA Units. Nominees from the floor must submit their intent to run to the President at least 15 days before elections with the final list of all nominees published four days before elections.</p>
<p>5 Article IX. Section 3. Point 2. Elections Committee of three members and two alternates from the General Membership is appointed by the BOD for contested elections. No candidate running for LAPTA office may serve on the committee. The committee appoints its chair and has charge of elections. For a contested position, the vote is by ballot. A majority vote constitutes an election. For an uncontested position, the President may declare the nominee elected.</p>	<p>The Elections Committee of three members from the General Membership is appointed by the chair at a General Membership Meeting only for contested officer positions. No candidate running for LAPTA office may serve on the committee. The committee appoints its chair and has charge of elections. The vote shall be by ballot. The candidate with the most votes is the winner.</p>
<p>6 Article X. Section 1. Governance and Notice. The annual LAPTA General Membership Meeting shall be held in August or September in conjunction with Leadership Training. The dates and locations are determined by the BOD. LAPTA shall be the governing body of the meeting which may be in-person, virtual, or a hybrid format. Notice of the meeting is sent to each Local PTA Unit President with 30-day notice.</p> <p>Section 5. Deferment. The LAPTA BOD may defer the annual LAPTA General Membership Meeting due to an emergency, disaster, or financial constraint by an affirmative two-thirds vote of the BOD. The annual meeting shall convene as soon as possible and may be in-person or use a virtual or hybrid meeting platform with 15-day notice.</p>	<p>Section 1. Governance and Notice. The Annual General Membership Meeting of LAPTA shall be held in August or September, with a minimum of 20 days' notice provided to all Local PTA Units. A Special General Membership Meeting may be convened either by the LAPTA President or upon written request of at least three members of LAPTA BOD, with a minimum of 5 days' notice given to Local PTA Units. LAPTA shall govern all General Membership Meetings. The LAPTA Board of Directors may postpone a scheduled meeting by a two-thirds affirmative vote.</p>